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Shadowing—GUIDANCE THAT WORKS



Todd Lapidus & Jim Mikula

Shadowing

GUIDANCE THAT WORKS®

Todd Lapidus & Jim Mikula

“Shadowing is the most common and most misused training method alive in the hotel and catering industry. Todd Lapidus and Jim Mikula's excellent book is a very timely and fine training aid.”

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Century Hotels

“This book is so appropriate for training new associates. Over the past 25+ years in my career, I have experienced everything from being a tutor to feeling used. Thank you for sharing this information with me and giving me insight in preparing for my next ‘Shadow.’”

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Shadowing

GUIDANCE
THAT WORKS

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PREFACE

Many businesses use shadowing (sometimes called mirroring or ‘the buddy system’) as a primary tool for training new front line service staff. In shadowing, a new employee (the shadow) is sent to observe and partner with a seasoned staff member (the guide) to learn how to do the job. Depending on the job’s complexity, shadowing may last from one day to two weeks, sometimes even longer.

During shadowing, the new employee sees how the job really gets done. S/he learns how to handle diverse customer interactions while adhering to company standards and policies. However during this time, s/he can also pick up a guide’s ‘bad’ as well as ‘good’ habits, which may then be passed on like a virus from one generation of employees to the next.

CHARACTERS

Jill

Experienced, hardworking and successful, she dislikes the burden of training new hires.

Donna

A well-meaning new hire assigned to 'buddy up' with Jill.

Alan

Jill's supervisor.

Karen

The first new hire that uses a Shadowing Plan with Jill.

Bobby

A friend.

Chapter 1

HERE WE GO AGAIN

Up early, Jill worked out on the treadmill and went over her personal plan for career advancement. She saw some of her goals coming true this year.

She arrived at work on time, feeling fit. After quick and friendly hellos to her team members, she organized her workspace. Just then Alan, her boss, walked by with someone new. From the look of apprehension and overload on this new person's face, Jill realized that she was a new hire. While busying herself Jill thought, *"Don't stop here, please just don't stop here."*

Sure enough, Alan stopped in front of Jill. *"Jill, this is Donna who has just joined us. She's been through orientation and practiced in the training room. Show her*

the ropes and the way it's done out here with our customers, will you? Donna, this is Jill, she's the best. Watch what she does and you'll do just fine." Alan smiled and waved as he walked away. Jill thought to herself, *"Here we go again."*

She smiled weakly and said with a sigh, *"Hi, Donna. Welcome. Stand over here and watch what I do. If you have any questions, just wait until there are no customers around and I'll try to answer them."* Jill's neck started hurting; her shoulders that had been loose from her workout began to tighten. Now, instead of feeling good, she suddenly felt tired.

This scene takes place in the business world thousands of times every day. Committed, energetic, hardworking, and experienced professionals become tired and unenthusiastic coaches of new hires when hearing those simple words, *"Show them the ropes and the way it's done out here with our customers, will you?"*

This book is about why a process that looks fairly straightforward and painless turns frustrating and ineffective, and what you can do about it. Let's join Jill after work that night. Instead of going home, she went out for a cup of coffee to shake off the negative effects of a day of shadowing.

Chapter 2

WHAT'S WRONG HERE

"Hey, Jill," called Bobby as Jill walked into the coffee shop. Jill looked blankly and mumbled, *"Hey, Bobby."*

"Whoa. What's up with you? This morning you were full of energy and life. What happened?"

"Well, they gave me a new employee to train. You know, stand on your shoulder, breathe on you, get in the way, and look dumb."

"You got a bad one, huh?"

"No, I don't think it's her. She's probably OK. But she makes me feel and look dumb. What do you think

my customers are thinking with this extra person hanging around?"

"Is that the problem; you think it looks dumb?"

"Well, it does look dumb, but that's not the problem."

"Let me get this straight; it's not the new employee and it's not looking dumb that's got you feeling dumb? Is that it?"

"Yes, that's it. I just don't like being shadowed."

Bobby was quiet for a while and then said: *"Why not? Your boss must think you're really good or"*

"Look, don't hand me that line. I hear it every time I get stuck with someone."

"Jill, just forget it. Let's get something to eat."

"I care too much about my work and what I do to just forget it. I did a poor job helping Donna and it's eating at me."

Bobby thought about Jill's words for a moment and then looked at her with a friend's concern.

"So let's figure out why you are bummed out by such a little thing."

"How I do my work is not a little thing!"

"OK, I didn't mean it like that. How could you be a better guide for Donna?"

Jill shifted her gaze a little then looked straight into Bobby's eyes and said: *"I don't know. What do you think?"*

"I don't know either, Jill. But tell me, what's the biggest problem you have with Donna? Personality? You don't like her makeup? Or did she say something that made you mad?"

"It's none of those things. She seems OK."

Chapter 3

THE FIRST TRIPWIRE

After thinking a moment, Bobby asked another question, *“So, Jill, your feeling about shadowing has little or nothing to do with the person you are guiding?”*

“That’s right. I feel this way every time I’m asked to let someone shadow me, unless I already know that person.”

“Ah!” exclaimed Bobby with a big smile.

Jill looked and waited, but Bobby just sat grinning.

“Bobby what’s the ‘Ah!’?”

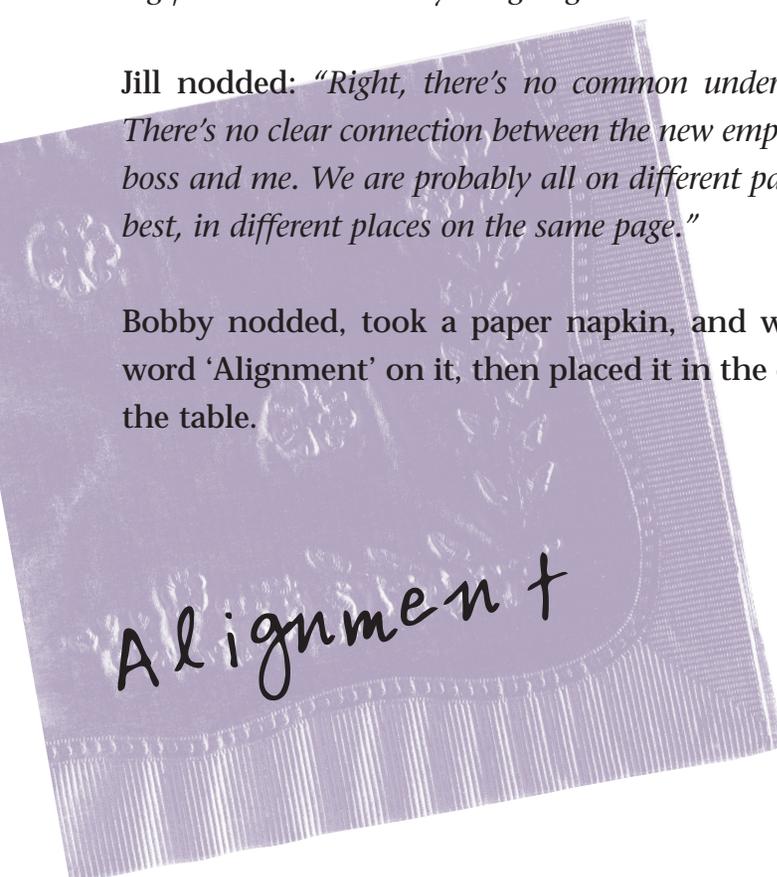
“Jill, think it through yourself. What do you have with someone you know that you don’t have with a stranger?”

“I know where they are coming from. I talk with them easier because we have some common experience, even if it’s not at work. There’s a place to start that’s human, that makes sense.”

“Exactly. So the first thing that’s missing in how shadowing is currently done at your company is a human connection, a common understanding of where the shadows are coming from and where they are going.”

Jill nodded: “Right, there’s no common understanding. There’s no clear connection between the new employee, my boss and me. We are probably all on different pages or, at best, in different places on the same page.”

Bobby nodded, took a paper napkin, and wrote the word ‘Alignment’ on it, then placed it in the center of the table.



Alignment

On the surface, the goals of shadowing seem obvious.

The guide just wants to get the shadow up to speed as quickly as possible without rocking the boat. The shadow wants to learn fast, fit in, and start working.

The supervisor/manager wants the guide to be a good teacher and role model for the shadow.

But does the guide know how to be a good teacher? Are the modeled service behaviors the proper ones? Or are inappropriate habits spreading like a virus because the guide is unaware of what the shadow is picking up?

This lack of certainty functions like the game of ‘telephone-telephone,’ in which one player whispers a message to the next player and so forth around a circle. Inevitably, when the message comes out the other side, it is garbled and a distant knockoff of the original. Often the message that finally comes out is so far off the mark that it is humorous.

The first few days on a new job are critical for picking up service behaviors. New behaviors, good and bad, can quickly become habits that are hard to break.

As Jill discovered, establishing the human connection when working one-on-one is a good starting point in getting aligned with a shadow. An understanding between the guide and the shadow is only part of the picture. They also need a shared goal or target, and that target needs to fit with their manager's expectations.



Chapter 4

THE SECOND TRIPWIRE

Jill got excited with the discovery of the first tripwire. It made sense. But thinking about it, she saw that there was more to the problem of shadowing than just alignment.

“Bobby, I’m certain that ‘Alignment’ is part of it, but I know it’s not everything. When Donna was introduced to me, the first thing that jumped into my mind was where was I going to find the time to get all my work done and help Donna learn, too.”

Bobby took a second napkin and wrote ‘Time.’

Jill went on: *“Bobby, I remember Anne, who I thought could be really good. She never made it past the first 90*

days. When I saw her the day she left, she told me that nobody ever had time for her questions. She knew we were busy. Anne thought she was not valued as a member of the team because nobody ever made enough time to speak with her about her questions, even during the first few days on the job.”

Time

Jill already works a full eight-hour day and, with the unpredictability of customers, does not necessarily have time to devote meaningful attention to Donna’s shadowing. Even with the best of intentions, she knows she must abide by her company’s culture that customers come first. She takes pride in her regular duties, and the task of training a new hire dilutes her customer service focus. This creates confusion and tension for both her and Donna.

Jill looked at the two napkins. ‘Alignment’ and ‘Time’ seemed apt descriptions of the problem. She also wondered if there was more to it. After a while she said, “You know, tomorrow I’m really going to pay attention and see what else is tripping me up.”

“Good for you.”

“Thanks, Bobby. Why are you smiling?”

“Because you don’t look tired anymore.”

Shadowing

Chapter 5

TWO MORE MISSING PIECES

The next day at work, Jill was more like her normal, energetic self. Donna showed up just as Jill finished arranging her workspace. Jill was sure that she could keep her intention to watch for ways to improve shadowing.

It didn't take long for Jill to discover the third tripwire. She greeted Donna but didn't know what else to say about how they should spend the day together. Five minutes into the day and a new discovery was staring Jill right in the eye.

Without a plan for the day, how could she or Donna use their time together wisely? What did Donna expect? What did her boss expect Donna to work

on today? How would Jill know if she was staying on track?

What was the plan?

The boss's statement, "*Watch what Jill does; she's the best,*" seemed too vague and not very helpful.

Jill remembered that somewhere there was a checklist for opening and closing and some memos on policy changes. Should she give these to Donna? She thought about it and after putting herself in Donna's place decided not to. Then she thought about alignment, the first tripwire she and Bobby discovered last night. She wasn't sure she understood everything about alignment, but she remembered that making a real human connection was an important part of the mix.

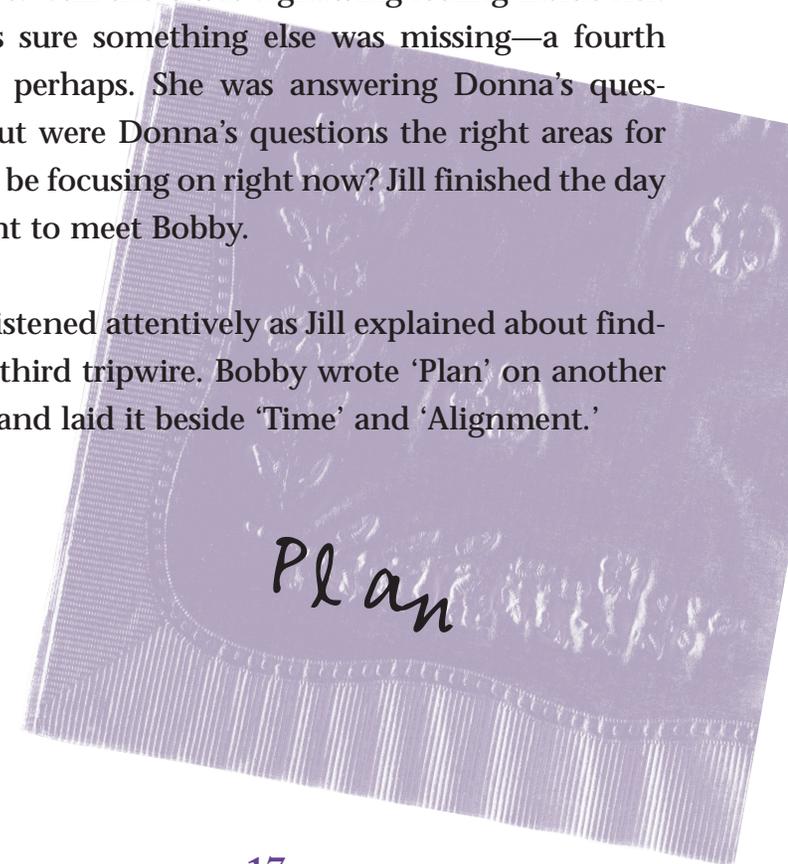
"Donna, how did you come to work here? Tell me about it and what you hope to accomplish while we are together."

Donna paused and a smile came across her face as she started to tell Jill about her enthusiasm for getting off

to a good start. She also mentioned the things she was worried about not doing right. Jill listened, smiled, and started to help Donna with some of the things she was worried about.

At lunch Jill took some time for herself and thought about how the day was going. She realized that today was a lot less draining. After all, she now was dealing with a real person with feelings and hopes, not just a 'new hire.' Still there was a gnawing feeling inside her. She was sure something else was missing—a fourth tripwire perhaps. She was answering Donna's questions. But were Donna's questions the right areas for them to be focusing on right now? Jill finished the day and went to meet Bobby.

Bobby listened attentively as Jill explained about finding the third tripwire. Bobby wrote 'Plan' on another napkin and laid it beside 'Time' and 'Alignment.'



No one told Jill in advance that a new employee would arrive for shadowing. Alan just dropped off Donna at Jill's workstation. There were no specific instructions for either of them except, "Show her the ropes and the way it's done out here with our customers, will you?"

What does that really mean?

Working with people is
not easy or simple.

A checklist may exist for the job, but everyone comes to the job with a different history of successes and failures. We all have different strengths and weaknesses.

In the complex and demanding world of serving customers, a plan is helpful to the guide, to the shadow, and to the manager. With a plan, everyone stays on track and can get back on track if and when the demands of the job take attention away from the task of guiding a new employee.

"Bobby, I remember my first few weeks on the job. You know, sometimes it was so frustrating I thought about leaving. One person would tell me one thing and then another person would have me handle the same situation in a different way. We'd start the day working on one skill, and before I had real confidence that I had gotten it, we would skip to the next thing and never come back to the first item. If we could just eliminate those kinds of situations, we would have a very positive impact on our new team members. We've found three of the pieces, and I know I'm missing something else here."

"What is it?"

"I don't know."

"Well, let's start with you. Are you feeling better about the shadowing?"

"Yes, a lot, and I know it's still not as good as it can or should be. I can't write a plan without Alan, and I haven't a clue what he would do if I asked him to put together a plan for Donna and me."

Bobby thought about this for a moment and said: "Let's leave Alan out of this for a minute. He's not here,

and we don't need to get sidetracked. So you feel better. Good. How about Donna?"

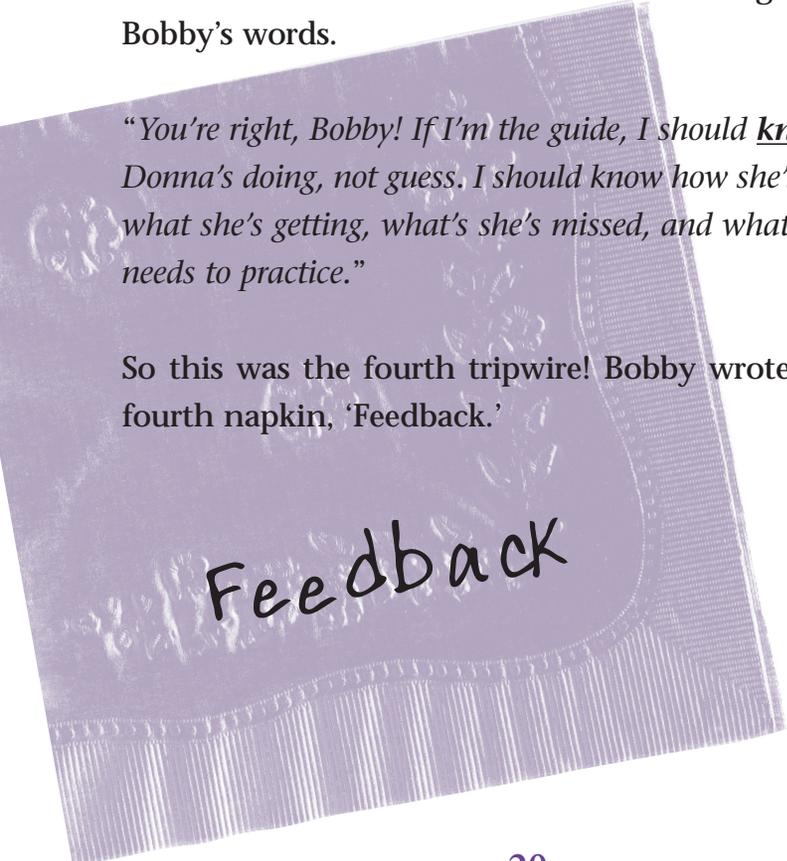
"She seemed to relax some after we talked about how she came to work for us and what she was worried about. My guess is she is feeling better."

"Your guess?"

A cloud came over Jill's face as she thought about Bobby's words.

"You're right, Bobby! If I'm the guide, I should know how Donna's doing, not guess. I should know how she's feeling, what she's getting, what's she's missed, and what she still needs to practice."

So this was the fourth tripwire! Bobby wrote on the fourth napkin, 'Feedback.'



Feedback

Few people like to receive feedback about their performance unless they know in advance that the news is good. In 'Shadowing—Guidance That Works,' a lot of the feedback contains good news as improvement is acknowledged. In addition, the feedback is given at the proper time to increase its effectiveness.

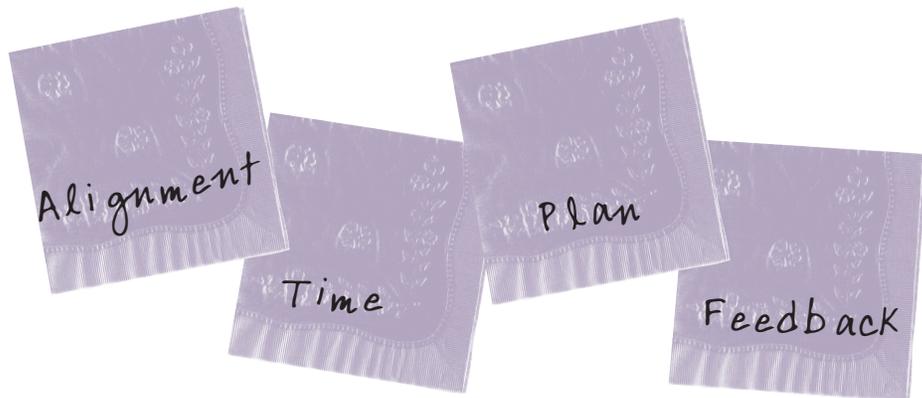
Most importantly, the feedback is on specific issues and focuses on a plan that makes sense to everyone involved.

Newly hired employees almost always feel nervous. How you handle the feedback from their first few interactions on the job will have a lasting effect. How do you select where, when, and on what to give the feedback?

It is also important to get feedback from the shadow on how s/he is feeling and responding to the shadowing. Jill understood this when she tailored her guidance to match how Donna was feeling about her shadowing experience.

Without a plan, there can be no assurance of hitting the target. Without a way of seeing how you and the shadow are doing, you will have a very hard time fine-tuning your efforts. No one hits the target the first time or every time. Getting it right with a nervous new hire is even more difficult.

The four tripwires were now on the table. Jill, with a little help from Bobby, had discovered what got in the way of effective shadowing.



Chapter 6

AN INVITATION

Jill walked toward the coffee shop with the events of the day running through her head. Donna's shadowing was no longer irritating. In fact, today Jill sometimes forgot she was being shadowed at all. After three days together, Donna was becoming a part of the surroundings, and Jill was no longer focused on the shadowing. Donna picked up what she could and soon would be on her own.

Jill got her coffee and sat down to wait for Bobby. As she looked out the window, she thought about how much less attention and effort she was putting into being Donna's guide.

"Hey, Jill," called Bobby.

"Hey, Bobby, I was looking for you."

"You still caught up in the shadowing?"

"Not really. Donna's almost finished. She'll be all right, and I can be free of an extra person hanging around."

Bobby sat quietly sipping coffee.

"Jill, why the change in attitude?"

"Well, it's not my job to figure out how to make shadowing work better."

"And if it were?"

Jill immediately moved forward and with conviction said, *"I'd change the whole way it's done."*

"Like how?"

"Like getting Alan over there involved." Jill pointed to

Alan, who was sitting by himself reading some papers at another table. *"Without my supervisor being on the same page, I'd just be wasting my breath. Who needs that?"*

"Is Alan OK? Is he open to talking about stuff?"

"I guess so. Bobby, don't you dare!"

Bobby was already walking over to Alan.

"Hey, Alan, come on over and join us."

Alan walked over and in a friendly voice said, *"Hey, Jill, I saw you come in, but I didn't want to bother you."*

"Hi, Alan."

Bobby pulled out a chair for Alan and said, *"Jill was telling me about the new hire, Donna, and getting her up to speed."*

"Yeah, thanks again Jill. Donna said you were really nice to her and helped a lot. She's going to work out all right."

Jill smiled weakly and nodded slightly. Alan could

sense something was up but didn't want to be nosy. He was about to get up to leave when Bobby said,

“Alan, how long does it take to get a new hire up to speed?”

“Well, it depends on what you mean by ‘up to speed.’”

“Is it until they can work independently and with confidence? Or is it until they can pull their own weight on the team?” Bobby responded.

“It's longer than most people think. There's orientation, then there's the initial training, and then the shadowing period. After that, new hires are naturally a little slower and make more mistakes the first few weeks. Probably on average it takes 30–45 days before we know if people will make it. There's a 90-day review period. After that most people settle down into the job.”

“So at least 90 days?”

“At least.”

“And then when do they get to be as good as Jill?”

Jill took a hard look at Bobby.

“As good as Jill doesn't happen too often. I've been looking into this and I think it's really not until six months or more that our people start to come into their own. It takes some longer, but it's at least six months.”

“Would it be worthwhile if you could shorten that time?”

“It sure would. We have made some headway in that direction. The orientation is pretty good, a lot better than it used to be, and initial training seems to work. I can't really change the demands of the job. Dealing with the public is always a challenge.”

Bobby thought about Alan's last statement for a few moments and then said quietly, “Jill has some ideas to improve the shadowing to make it better and quicker for everyone involved.”

Chapter 7

JILL EXPLAINS

Jill gave Bobby a look. Alan said, “*Jill, you have some ideas?*”

Jill still had the four napkins with the tripwires written out. She laid them on the table and went over them with Alan.

“Well, these make sense to me. Jill, you know better than I do what gets in the way of shadowing. If you can show me how to improve it without spending more time or money, I’d like to hear about it.”

Jill started to pull away. She had heard similar lines in the past, not from Alan, but from other supervisors who used time and money to build a wall around an

idea. She was not interested in putting herself out to receive a pat on the back and a final line about the budget.

Bobby was curiously quiet. As if waiting just for this moment, Bobby turned to Alan with a smile and said: *“What Jill’s thinking about probably won’t cost more, and it could save a lot.”*

Alan turned his full attention to Bobby.

Bobby went on: *“While we’ve found four tripwires that hurt shadowing, we need you as the supervisor to create more helpful conditions for the guide and the new hire. Without you it can’t happen.”*

Very slowly and carefully, Alan asked, *“Why is that?”*

Bobby calmly went on: *“Because the key to the whole issue is alignment between the guide, the new hire, performance standards, and service expectations. Jill and you both are needed to set the stage for the new hire.”*

Jill and Alan sat quietly for a while, every now and then stealing a glance at each other. Bobby seemed to have lost interest and stared out the window.

Chapter 8

ALAN GETS IT

After a long while, Alan shrugged his shoulders and looked at Jill. *“Jill, how could we make shadowing work better?”*

“I don’t have all the answers yet, Alan. And I do have some questions that I know need to be answered before we can go forward.”

“If you’re willing to work with me on this, Jill, I’m willing to dig into this with you. If, when we are done, it makes sense, I will set up a test case in which we try it out and see if it works. I can’t promise more than that. But I am promising a lot more than just lip service. I trust your instincts on this, and I know you work hard and care about what you do.”

Jill looked at him and let his words sink in. He seemed genuine, but she needed more proof that this would be worth the effort. She knew that since she didn't have the answers, Alan couldn't promise to implement what didn't already exist. *"I'm almost ready to work this through with you Alan, but tell me, why were you so quiet before? When you shrugged your shoulders, I thought you weren't interested."*

Jill saw a different kind of smile from Alan as he gently said to her: *"You got that shrug really wrong, Jill. I first wanted to check my own intentions and ability to be patient with this, before asking you to take the next steps."*

Bobby turned back from gazing out the window to see Jill and Alan smiling warmly at each other.

"I think we should start to explore the four tripwires and see how we can meet the challenges they describe," said Jill.

Alan immediately agreed. Bobby quickly held up a hand and said: *"Before you start on that path, I have a suggestion. Let's remember that this project is for the new hire and the guide. Let's remember the conditions that both are experiencing when they are involved in shadowing."*

"The new hire is overwhelmed with information, excited, and probably nervous and insecure."

"The guide has a full plate of work without the additional task of shadowing. If you agree that this is the situation, what would it tell you about any solution you come up with?"

Jill and Alan both thought this over. They looked to Bobby, who seemed not to have the answer either. Alan turned to Jill and said, *"Are the new hires really overwhelmed?"*

"Not all of them, Alan, but enough that we should take that into account."

After a bit Alan said, *"Well, when I'm overwhelmed, I want to simplify the situation—organize it so it makes sense."* Jill immediately saw the sense in this and moved the four napkins around on the table.



“It seems to me, Alan, that if we have a good plan, then it would be a whole lot easier to be in alignment. And we need the right time to give effective feedback.”

“Makes sense to me, Jill. What kind of plan are we talking about and what would be in it?”

“Alan, the first thing I need when you give me a new hire to guide is a clear sense of what you want accomplished.”

Before Alan could respond, Jill pushed rapidly on. *“I know it seems clear to you, but it’s not really clear to me.*

For example, do you want me to go over the training they just had, or check what they know, or just sort of give the new hire some support when they first have to deal with customers?”

Alan moved back in his chair and stopped to think. *“I see what you mean. How can we be more specific? So much of the really important stuff doesn’t fit into a procedure manual or translate very well from role-playing in the training room to actually dealing with customers on a day-to-day basis.”*

Both of them looked at Bobby. *“I think you are both on the right path here. Let’s again remember the new hire and the guide and their need to keep it simple. Alan, how can you organize your expectations for the shadowing period to make it clearer?”*

“We could organize it by topic. There are just a few really important topics that everyone in Jill’s position has to get right every time. They cover most of the situations they meet everyday. A supervisor or shift lead can handle the exceptional situations when and if they come up.” Jill nodded in agreement.

Bobby looked at his watch and abruptly stood up.

“Sorry to rush, but I have to be off. It seems to me that the first item to organize is the topics you want to cover during the shadowing.”

#1—Topics to be covered

“After that is completed, I suggest you set a target or goal for each of those topics. The target would highlight the expectations you have as a manager, Alan, of the new hire for the topic area.”

#2—A target for each topic

“For example, if the topic is product knowledge, what do you expect your new hire to be able to do in this area by the end of the shadowing period? Is your expectation the ability to describe each product in full detail or is your expectation that the new hires know how to access information so they can provide a full description for the customer who asks? The two targets are very different, even though the topic is the same. This kind of specific information is the key to improve shadowing.”

Alan sat straight up and almost shouted, “You are right! Jill do you remember Ben? We thought he was going to be just great, but after five weeks he quit. He said we were so inconsistent in guiding him during his first few weeks on the job that he couldn’t see working for us. I thought it was a cover for something else. Now, I don’t think so.”

“When we have a plan with really specific and clear goals for each of the critical topics—a Shadowing Plan, then it should make it easier for everyone to succeed.”

“That seems right, Alan,” Bobby went on. “Why don’t you two list the topics and targets you expect in the shadowing of new hires for Jill’s position? I believe the success of the Shadowing Plan you are creating is that each of the people involved has a role in contributing to it. There needs to be a place for input and feedback for the manager, for the guide, and for the new hire as the shadow. Only when all three of these positions are included can you get the kind of alignment and plan that will improve your outcomes.”

Bobby waved as he left the coffee shop. But neither Jill nor Alan noticed. They were both leaning forward and already at work.

Chapter 9

THE SHADOWING PLAN

Three days later, Jill called Bobby. *“Well, Alan and I are stuck. We got the supervisor/manager and the guide involved in the Shadowing Plan, but we don’t know how to include the shadow. We can’t ask a new hire for their input on what items to cover. They don’t have enough background or experience with our company. We hoped maybe you had an idea.”*

“What’s the most likely thing the guides will forget when they are being shadowed?”

“It could be a lot of things. From my own experience and if I had to choose only one, it would be knowing what the shadow was picking up, how their understanding was improving.”

The Shadowing Plan

“OK. I agree that is a tricky area and probably the first one to fall by the wayside when things get busy. It’s important and something to capture in the Shadowing Plan. Instead of the guide having to guess about it, have the shadow provide the information in a way that is clear and meaningful.”

“How, Bobby?”

“I don’t know, but I’m sure you and Alan will figure it out. I have to run. See you in a few days.”

Jill and Alan began to develop ideas about clear and meaningful ways to measure a shadow’s progress. When they next saw Bobby at the coffee shop, they were ready with a Shadowing Plan.



SHADOWING PLAN

Shadow: _____

Guide: _____ **Shadowing Day:** _____

Topic: _____
(Filled in by Manager)

Target: _____
(Filled in by Manager)

At Start of Shadowing *At End of Shadowing*

Importance to Customers: _____
(Filled in by Shadow)

Importance to Colleagues: _____
(Filled in by Shadow)

Key to Success on This Topic: _____
(Filled in by Shadow)

Assessment:
(Filled in by Guide)

Missed It:	Getting It:	Got It:
<input type="radio"/> Understanding	<input type="radio"/> Understanding	<input type="radio"/> Understanding
<input type="radio"/> Delivery	<input type="radio"/> Delivery	<input type="radio"/> Delivery

Chapter 10

TIME AND FEEDBACK

“So you see, Bobby, the manager fills in the top area, the shadow the middle area, and the guide the bottom. Using this we should never have a failure to support potentially great team members like my experience with Ben. There just are not enough really good people around to waste any opportunity for success,” stated Alan.

“Good job. This makes perfect sense to me, and it keeps the need for simplicity on track. Now what about the other two tripwires: Time and Feedback?”

“The issue of time is pretty clear to us,” said Jill. “Alan and I think that about five minutes at the beginning of the shift to go over the Shadowing Plan should do it. During the shift, the shadow can refer back to the plan to keep the

topic and their target for the day on track. At the end of the shift, the shadow and guide can fill out their respective parts of the plan. Then the guide can go over that with the shadow.”

“What happens if the shadow and the guide successfully cover the topic in less than one shift?” asked Bobby.

Jill and Alan looked at each other. *“You don’t want to waste time. We are after more effectiveness, not less,” Bobby pointed out.*

Jill finally said: *“Well, we can proceed to the next target as long as the shadow has successfully completed the first. Would that be all right, Alan? You would have to prepare more than one Shadowing Plan so that the guide and the shadow could immediately move to the next topic if they were ready.”*

“I can do that Jill; that’s not a problem. In fact, I see

completing the entire Shadowing Plan next week for all new team members in our area. But Bobby, isn’t there a risk that the shadows will feel overwhelmed by one topic after the other coming at them?”

“Maybe, Alan, but the greater risk is slowing down the process and missing the overall goal of a much more productive shadowing experience. Besides, the guide would be in control of when to move to the next topic. If the guide sees a need for a break before moving on, then the guide can wait to introduce the next topic. We don’t want the shadowing to be slow and boring. Then everyone loses.”

Alan and Jill both agreed to expand the Shadowing Plan to include the ability to cover more than one topic a day. *“What happens to the Shadowing Plan after that?” asked Bobby.*

“It comes to me,” said Alan. “I’ll track the progress, and if the plan shows that the shadow needs additional support, I’ll provide it the next day.”

“Jill, can you provide the type of feedback that is required by the form? It can be uncomfortable to mark a co-worker as ‘Missed It.’”

“We’ve talked about that a lot, Bobby. Alan and I agree that if we don’t provide that kind of timely feedback, the shadows may fail even when putting in a good effort. That seems a terrible waste for everyone. So while it’s a lot less comfortable than sitting here with you, it’s a necessary and important part of shadowing. Alan and I put it this way:

‘If you are unable to provide the direct feedback that is required on the Shadowing Plan, then don’t be a guide.’”

Bobby thought about this for a while and nodded in agreement. Bobby then looked at Alan and asked, *“Are you ready to test it out?”*

“Next Monday Jill is working with a new team member. We will use the Shadowing Plan and see how it goes.”

Chapter 11

THE TEST

On Monday Alan came by at the start of Jill’s shift with a new hire, Karen. Alan selected Karen for the test because during her hiring interview she was mature, straightforward, and seemed to have no trouble at all speaking her mind. He introduced Karen to Jill and then went over two Shadowing Plan documents he had put together for Karen.

SHADOWING PLAN

Shadow: Karen

Guide: Jill **Shadowing Day:** 1

Topic: Greeting Customers
(Filled in by Manager)

Target: To use professional phrases in a way that makes each customer feel appreciated.
(Filled in by Manager)

At Start of Shadowing *At End of Shadowing*

Importance to Customers: _____
(Filled in by Shadow) _____

Importance to Colleagues: _____
(Filled in by Shadow) _____

Key to Success on This Topic: _____
(Filled in by Shadow)

Assessment:
(Filled in by Guide)

Missed It:	Getting It:	Got It:
<input type="radio"/> Understanding	<input type="radio"/> Understanding	<input type="radio"/> Understanding
<input type="radio"/> Delivery	<input type="radio"/> Delivery	<input type="radio"/> Delivery

SHADOWING PLAN

Shadow: Karen

Guide: Jill **Shadowing Day:** _____

Topic: Computer key stroke sequence
(Filled in by Manager)

Target: To accurately and consistently process customers using the four major keystroke sequences without referring to the manual or a co-worker.
(Filled in by Manager)

At Start of Shadowing *At End of Shadowing*

Importance to Customers: _____
(Filled in by Shadow) _____

Importance to Colleagues: _____
(Filled in by Shadow) _____

Key to Success on This Topic: _____
(Filled in by Shadow)

Assessment:
(Filled in by Guide)

Missed It:	Getting It:	Got It:
<input type="radio"/> Understanding	<input type="radio"/> Understanding	<input type="radio"/> Understanding
<input type="radio"/> Delivery	<input type="radio"/> Delivery	<input type="radio"/> Delivery

Alan talked for several minutes about the target for each of the two topics, answered their questions, and then wished them both a good day. While Alan was talking, Jill paid close attention to Karen's reactions. After Alan left, Jill introduced herself, talked about how she first came to work at the company, and then asked Karen about her hopes and concerns. After Karen had talked a little about herself, Jill asked,

“Karen, when Alan was going over the target of greeting customers, did it make sense to you?”

“Oh, sure, Jill, it's easy to understand.”

“I could feel you react a little to what Alan was saying, but I'm not sure what you were thinking.”

“Don't get me wrong, Jill, but I heard those kind of customer service statements in my last job. They sound fine, and then nobody ever really does anything.”

“Well, it's different around here. Let me show you with this next customer what we mean.”

By lunchtime Karen was consistently handling customer interactions in a way that met the target. Jill asked Karen to fill out the middle part of the Shadowing Plan, and then she checked Karen's answers.

Shadowing

SHADOWING PLAN

Shadow: Karen

Guide: Jill **Shadowing Day:** 1

Topic: Greeting Customers
(Filled in by Manager)

Target: To use professional phrases in a way that makes each customer feel appreciated.
(Filled in by Manager)

	<i>At Start of Shadowing</i>	<i>At End of Shadowing</i>
Importance to Customers: (Filled in by Shadow)	<u>Makes them feel good</u>	<u>Makes them feel good and brings out the best, most cooperative behavior from that customer</u>

Importance to Colleagues: (Filled in by Shadow)	<u>?</u>	<u>Keeps a professional consistency and reduces the number of complaints</u>
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Key to Success on This Topic: Remember each customer greeting is important to everyone's experience
(Filled in by Shadow)

“Karen, it’s clear to me that you really got this. You understand the topic and know how to deliver on target.” Karen smiled broadly as Jill checked the ‘Got It’ boxes.

Assessment: (Filled in by Guide)		
Missed It:	Getting It:	Got It:
<input type="radio"/> Understanding	<input type="radio"/> Understanding	<input checked="" type="radio"/> Understanding
<input type="radio"/> Delivery	<input type="radio"/> Delivery	<input checked="" type="radio"/> Delivery

“Ready to go to the next topic?”

“Sure, Jill, let’s get to it.”

Karen had a lot more trouble with the technical topic and at the end of the shift. Jill checked ‘Getting It’ on the Shadowing Plan. She went over the parts that were still hard for Karen. “Don’t worry about it, Karen. Tomorrow we will start right away with this topic and stay with it until it’s second nature to you. I bet you will have ‘Got It’ by the end of tomorrow.” Karen shook her head a little and said, “I sure hope so.”

Chapter 12

KAREN GETS IT

At the end of the week Jill and Alan got together with Bobby at the coffee shop. Karen came with them. Jill introduced her to Bobby. *“Bobby, this is Karen. She was my shadow this week. Since we were talking about how the Shadowing Plan was working, I thought it was best to hear from all the people involved. Karen agreed to help.”*

“Welcome, Karen. So how did it go? Let’s start with you, Alan.”

“It was fine for me. In fact, it is a lot easier than the old way. Part of the reason I used to rush through the introduction of the new hire was I felt uncomfortable. I didn’t really have much to say. Now I can get right down to

specifics that make sense to the guide and me. Hopefully they also made sense to you, too, Karen.”

“They did. It also showed that you guys were organized and took the shadowing seriously. At my last job, I was just dumped off with a smile and a line about ‘You’re now with the best. Watch how she does it and you’ll be fine.’ That seemed fake to me. This was a lot better.” Bobby watched Jill and Alan smile.

“How was it for you, Jill?”

“I liked it a lot more. The whole thing started in a much more positive and focused way than before. The forms really helped us stay on track. And when I had to mark Karen as ‘Getting It’ the first day on the computer key stroke sequence, I could do it in a way that felt positive.”

“Karen, how was that for you?” asked Bobby.

“Well, once again, it made me feel you guys take what you say seriously and expect the shadowing to produce results.”

“I didn’t like receiving the ‘Getting It’ mark on the second topic, but it made sense to me. And Jill made it clear what I still needed to work on. Getting the ‘Got It’ made me feel great.”

Bobby nodded. *“OK, so we seem to be moving in the right direction here.”* He went on to find out other specifics of Karen’s and Jill’s experience, asked for ideas on improvement and how Alan would track the progress of the new program without creating a lot of unnecessary paperwork.

