ADAPTIVE

User Guide

A product of:

GEIGSEN

Contents

General

General – Contents

1. Adaptive overview
2. Access and basic navigation
3. Adaptive Dynamic Menu (ADM) overview

Welcome to Adaptive!

We are thrilled that you've decided to use Adaptive to enable the execution of your organization's strategy and the development of your people!

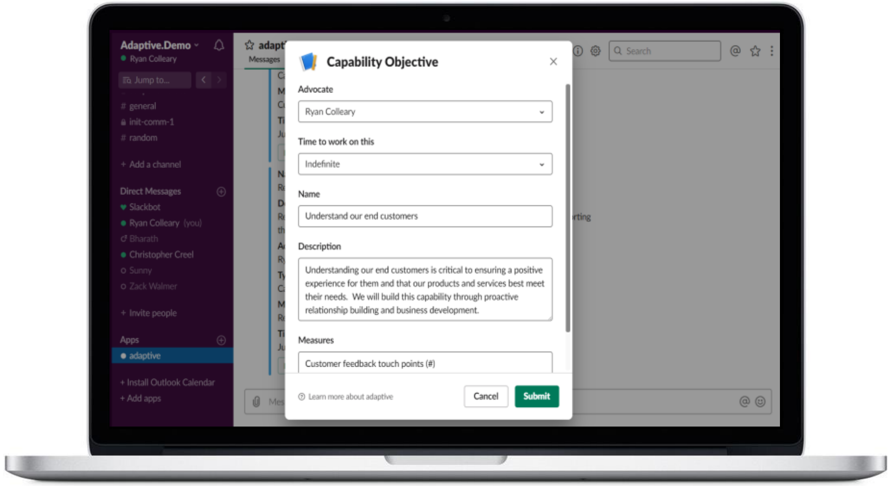
Adaptive is a Slack-based tool that is intended to help organizations achieve long-term change by involving everyone. To do this, the goal is to build a culture of feedback and collaboration by connecting the organization's strategic goals with individuals' daily tasks and personal development objectives. You can access a brief introductory video here.

Adaptive drives change at scale

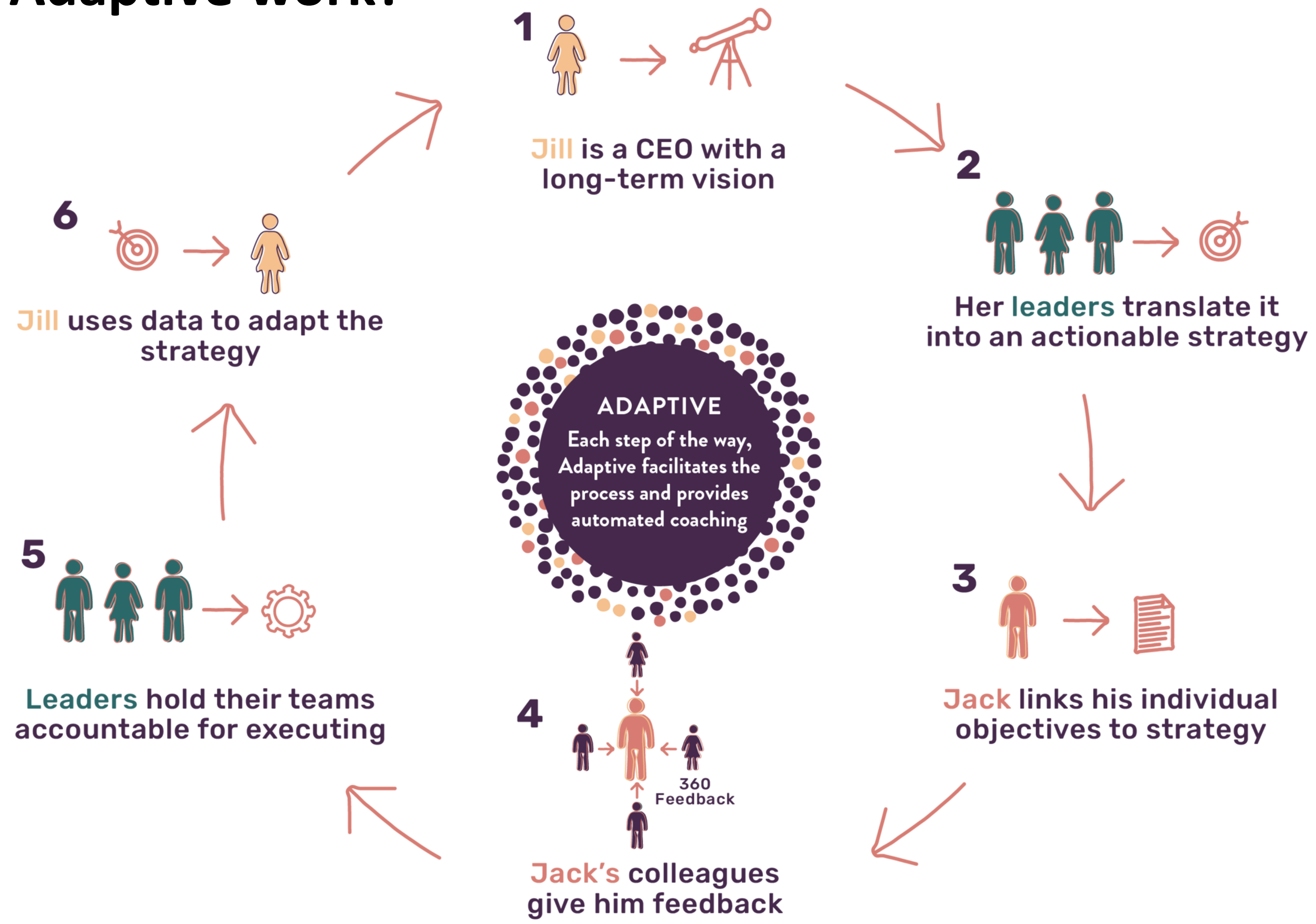
Adaptive **is a simple bot that meets you where you work – in Slack – that helps organizations drive change at scale that sticks.**

Adaptive:

- **Enables leaders to define and manage** the strategy in a simple, light-touch way
- **Connects the organization's strategic goals with individual** development objectives
- **Builds a habit and culture of collaboration**, coaching and feedback
- **Does all the above with a friendly and helpful chatbot** that provides automated coaching along the way



How does Adaptive work?



Over time, interactions are distilled into reports for learning

Strategy Performance

DRAFT: Drastically improve the working lives of people at X organizations by the end of 2020 through innovative services and technology

#	Objectives	Status	#	Initiatives	Status
1	*Establish a best in class reporting capability*	*On Track*	1	*No Initiatives*	*No Status*
2	*Create a high performing marketing capability*	*At Risk*	2	*Chief channel strategy*	*No Status*
			3	*Content one-pager plan*	*At Risk*
			4	*Distribute the Adaptive explainer vid*	*No Status*
			5	*Website refresh*	*Off Track*
3	*Test objective*	*No Status*	6	*No Initiatives*	*No Status*
4	*Reduce defects in user experience*	*On Track*	7	*No Initiatives*	*No Status*
			8	*No Initiatives*	*No Status*
5	*Build and sustain a reliable sales engine*	*No Status*	9	*Adaptive funding*	*Off Track*
			10	*Recruiting search*	*On Track*
			11	*Remote collaboration package*	*At Risk*

Jill uses **organization-level reports** to answer questions such as:

1. How is the organization performing on its overall objectives?
2. How well is the team collaborating with one another?
3. Where are my high and low performers?

Jack uses an **individual performance report** to answer questions such as:

1. How am I (as an individual) performing?
2. What feedback do my colleagues have for me to improve?
3. How is my work connected to the bigger picture strategy?

Here are some general observations about your feedback. The colors to the far left hand side is an assessment to help you come up improvements that will have the greatest impact. Dark green means very strong, light green means strong, yellow means opportunities for improvement, red means a lot of room for improvement.

	Topic	Analysis
	Feedback Quantity	I didn't see a lot of feedback for you this quarter from the team. You received 2.60 comments on average per topic. This quarter you should work with a coach to find ways to inspire others give you more feedback at the end of this coming quarter.
	Network Strength	Your network is roughly 3 people, which makes you seem a bit isolated. To do your best work, you need to grow your network. Make sure to reach out to more people this quarter, to align your work with theirs, and see how you can support each other.
	Sentiment	The team gave you generally positive feedback. Nice job! Now is the time to generate ideas for even more positive feedback in the coming quarters. Take some time to ask others for ideas.
	Relationship	Wow! You really generated a lot of great energy for the team! Your performance almost exceeded expectations. Can you think of ways that you can help others on the team improve their energy? Maybe you want to look for coaching opportunities to help others improve in this area.
	Overall	What an impressive job you turned in! Your performance is above expectations. You are making important contributions to this organization and the team understands that. Now that you have reached this impressive level, find ways to support those that might need help.
	Consistency	I do not have enough data to measure the consistency of your performance yet. Don't forget to focus on your consistency over the next quarter, so you can turn in good scores. Once I have three data points, I will be able to tell you how consistent you are.

Key terms

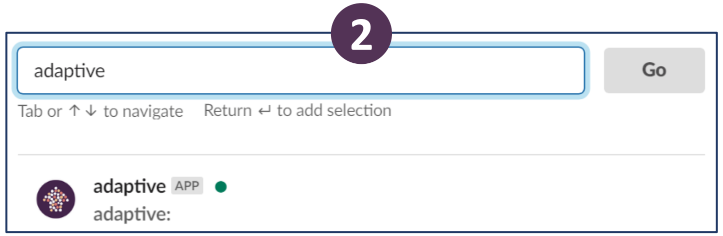
Adaptive is all about connecting **strategy** with **people**. Here are definitions of some key terms you'll see in the application:

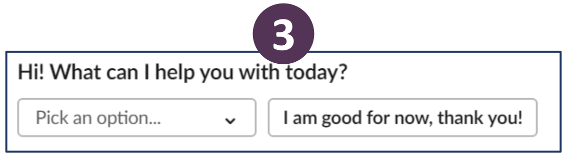
	Term	Description
Strategy	**Vision**	A measurable and timebound statement that articulates the overall strategic direction and end goal
	Objective	An individual component of the strategy that represents either a desired outcome or capability to be built
	Initiative	A time-bound change project with dedicated resources, designed to help the organization achieve its objectives
People	**Competency**	The attributes that embody the organization, that all members of the organization should exhibit and strive to improve against
	Individual Development Objective (IDO)	An action-oriented development goal aimed at enhancing personal skills and capabilities
	Coaching Team	Internal team mentors (regardless of level or managerial position) intended to support individual team members in achieving their IDOs

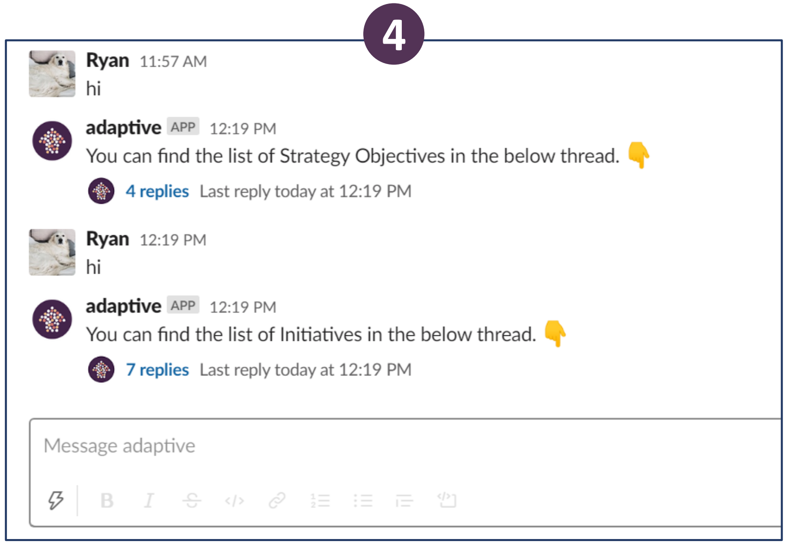
Access and basic navigation

Accessing and interacting with Adaptive takes place entirely within your organization's Slack space. To access Adaptive:

1. Log into your organization's Slack space
2. Send a direct message to "Adaptive"
3. When you send any message to Adaptive in the Slack chat window (such as "hi") a dropdown menu called the Adaptive Dynamic Menu (ADM) will appear. This menu is where you can initiate basic actions, such as providing feedback, creating an objective, etc. (Note: More details for each of these actions are in their respective sections of this guide.) If you don't have any action to take, select "I am good for now, thank you!"
4. All interactions with Adaptive take place in the direct message chat, and a record of your interactions will be stored and can be referred to in your chat window



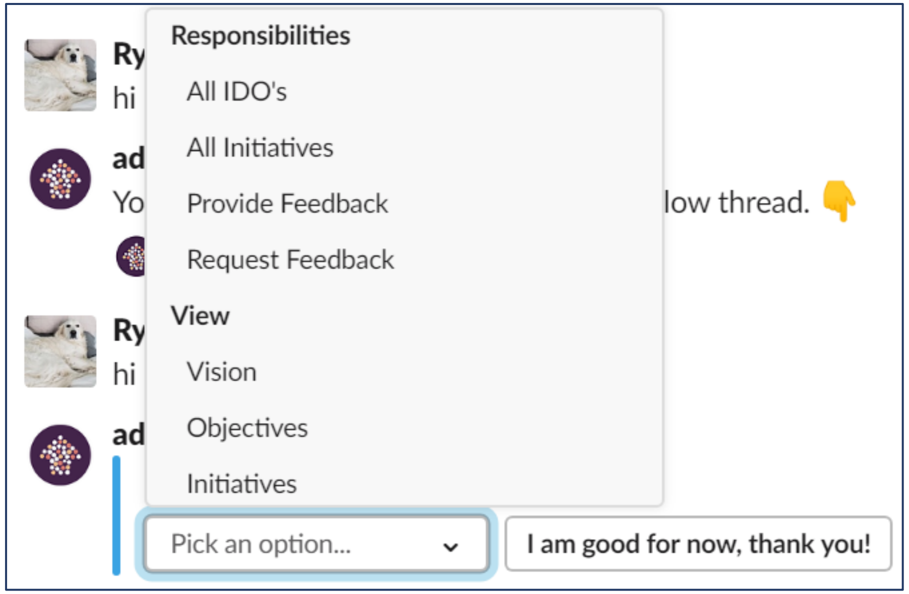




Adaptive Dynamic Menu (ADM) overview

The Adaptive Dynamic Menu (ADM) is your launchpad to interact with Adaptive. Below are descriptions of the various sections of the ADM. (Note that your level of permissions will impact what you are able to see).

- **Responsibilities** – This is your personal section for any actions you need to take, such as updating progress on an individual development objective (IDO), or providing feedback to a colleague
- **View** – Here, you can view elements of the organization's strategy (vision, objectives, initiatives, and advocates for each of those), the organization's competencies, and the schedule of events (current quarter and next quarter events)
- **Create** – This is where elements of Adaptive can be created (e.g., IDOs, objectives, competencies, etc.)
- **Assign** – for users with the appropriate level of access, this is where objectives can be assigned to different communities
- **Settings** – If you have notifications, Adaptive will send them to you at the same time each day. Here you can update the time of day this occurs – think of this as your "meeting time" with Adaptive!
- **Reports** – Here, real-time reports can be generated to view progress against the strategy, progress against IDOs, and feedback you've received individually



Administrators

Administrator – contents

1. Administrator user overview
2. Permissions overview
3. Managing permissions through communities
4. Recommended roles for the overall process
5. Schedule of events

Administrator overview

Administrators are responsible for managing the organization’s usage of Adaptive. Specific responsibilities:

- Creation and management of all community types, and therefore have access to all levels of permissions
- Adding and removing users – if users attempt to access Adaptive via direct message but do not yet have access, a notification will be sent to administrators that the person is requesting access
- The administrators are also generally the “go-to” subject matter experts for the Adaptive tool, often either providing training and onboarding to new users, or training others to be able to do so

Permissions overview

Roles and permissions in Adaptive are managed through communities. Below is a description of each permission level. In practice, communities are used in Slack channels where content related to that community can be discussed.

Role	Description
Admin	The administrator(s) for the overall process. Administrators are responsible for managing the process internally and can create and manage other community types.
Strategy	Users responsible for managing the organization-level strategy. These users will be able to create and update elements related to the strategy (e.g., vision, objective, initiatives). This role is typically filled by leaders or those involved in managing the strategy.
HR	HR team members responsible for managing the performance feedback process. These team members will have access to individuals' feedback and will manage the reporting process. They are also responsible for managing the holiday schedule.
Competency	Users responsible for managing team competencies that people will align feedback for their colleagues to. These users will be able to create and manage team competencies.
Coach	This is the team of users who will be available to be selected / requested as a coach for individual development objectives. These team members will serve as the group charged with directly coaching and mentoring the broader team's personal development.
User	These users will be able to create and manage individual development objectives, provide / request feedback with colleagues, and to view (but not create or edit) the strategy and competencies. Note: Any member of any of the above communities will automatically have access to this level of permission.

Managing permissions through communities

Communities are groups of users in Adaptive. Communities can be used to manage permissions, and categorize contents of the strategy (i.e., objectives and initiatives.) This section is focused on permissions, for more information on the strategy-related communities, see the Strategy section of this user guide. The default list of communities are those that can set permissions: Admin, Strategy, HR, Competency, Coach, and User.

To set up these communities in your account:

1. In Slack, click the plus sign next the Channels, and create a private channel. (Note that you must have Slack permissions in your organization to create private channels.) As a tip, we recommend using a common naming convention for these channels, such as: “adaptive-admin”, “adaptive-strategy”, etc.
2. Invite Adaptive to the private channel by typing into the chat window “/invite @adaptive”
3. You can then link the default community by selecting it from the drop-down menu that appears. You will then receive a message from Adaptive confirming its arrival
4. Lastly, invite users to this community by inviting them to the channel. This can be easily done again with the “/invite” Slack command. Remember, members of these communities will have access to the permissions on the prior page.

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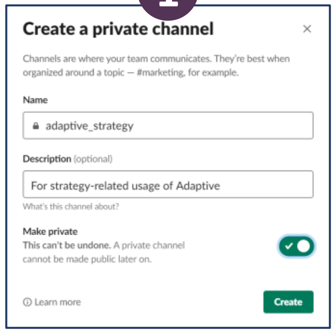

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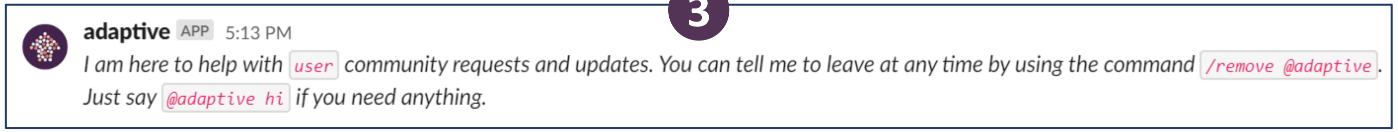

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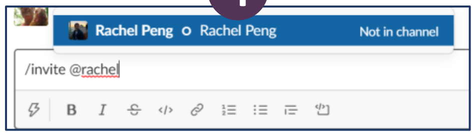


Recommended roles for the overall process

It is also worth considering what specific roles individuals on your team should play in managing the overall process. Below are some recommendations that we've seen work well. Depending on the size of your organization, the same person may play multiple roles (e.g., one person playing the role of both Internal Administrator and Coaching Lead)

Role	Description
Process Sponsor	The owner of the overall Adaptive process. Typically, this role is played by the person responsible for managing the overall organization's strategy and is often either the leader at the very top (e.g., CEO), or the person tasked with facilitating the process of executing strategy and/or connecting the strategy with the organization's people (e.g., CHRO, COO, CEO's "chief of staff", etc.)
Internal Administrator	The internal subject matter expert. This person is responsible for managing all of the technical aspects of Adaptive (i.e., with Admin-level permissions), and should serve as the go-to resource to train other users. It often helps to have a few of these!
Coaching Lead	Person responsible for managing the coaching team. While coaches are holding the people they are coaching accountable, the coaches themselves must be held accountable as well. The coaching lead is also responsible for ensuring that the entire coaching team is building the required skillsets to effectively support the organization.
Team Lead	For each division within your organization that is using Adaptive, it is critical to engage the leader of each team to be a champion of this process. These leads are responsible for providing effective guidance for their teams, identifying the team-level initiatives that they should be focused on, and holding their teams accountable for participating in the process overall.

Schedule of events

This is the general cadence at which events (and therefore notifications from Adaptive) occur throughout the quarter. Note that no notifications will be sent on holidays – notifications will be sent the day after in those cases.

	Month 1				Month 2				Month 3			
Activity	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**
All users												
All users receive individual feedback reports from prior quarter	■											
Users are prompted to create individual development objectives (IDOs)		■	■	■								
Users to execute IDOs throughout the quarter (weekly notifications to provide short updates on progress)			■	■	■	■	■	■	■	■	■	■
Weekly notifications for users to provide feedback for quarter (colleagues can provide / request feedback at any time during quarter)									■	■	■	■
Quarter end IDO and feedback reports generated												■
Strategy users												
Objective advocates to execute objectives throughout the quarter (weekly notifications to provide short updates on progress)		■	■	■	■	■	■	■	■	■	■	■
Initiative advocates to execute initiatives throughout the quarter (weekly notifications to provide short updates on progress)		■	■	■	■	■	■	■	■	■	■	■
Quarter end strategy performance report generated												■

Strategy

Strategy – contents

1. Strategy overview
2. Vision
3. Objective and initiative communities
4. Objectives
5. Initiatives

Strategy overview

Strategy users are responsible for managing the organization-level strategy. These users will be able to create and update elements related to the strategy (e.g., vision, objective, initiatives). This role is typically filled by leaders or those involved in managing the strategy. A few tips to keep in mind for the strategy content:

- A good strategy is an ***integrated set of choices*** which position an organization to create sustainable competitive advantage and superior results over the long run
- Strategy execution is about ***driving change*** – understanding where the organization needs to shift behaviors and activities to create value faster than "business as usual"
- In Adaptive, there are three critical, directly related elements of the strategy:

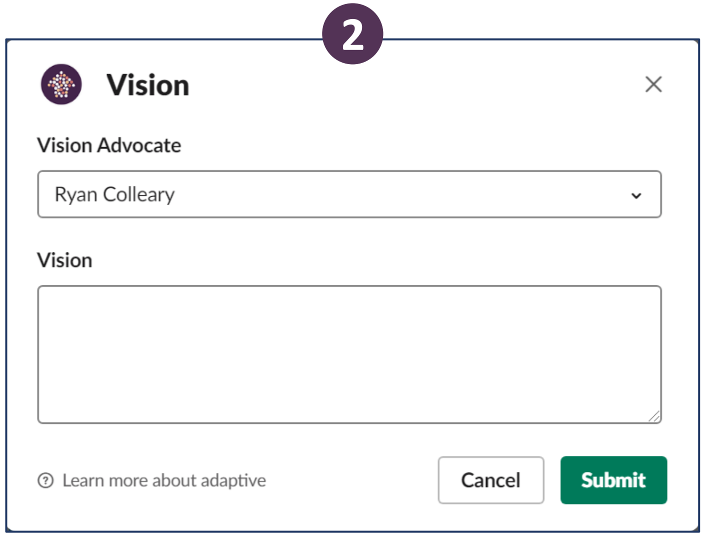
Term	Description
Vision	A measurable and timebound statement that articulates the overall strategic direction and end goal
Objective	An individual component of the strategy that represents either a desired outcome or capability to be built
Initiative	A time-bound change project with dedicated resources, designed to help the organization achieve its objectives

Create / edit the vision

The **vision** is the measurable and timebound statement that articulates overall direction and end goal of the strategy. A good vision will provide both guidance for behavior and inspiration for employees.

To create the vision:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Vision
2. Fill out the form:
   - **Vision Advocate:** Person responsible for ensuring the vision is met and holding the team accountable for driving it. This is often the leader of the organization (e.g., the CEO), or a person responsible for managing this process (e.g., the CEO's chief of staff, the strategy process owner, etc.)
   - **Vision:** Place to enter vision statement.
3. When the form is complete, select "Submit"



To edit the vision:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select View>Vision
2. When the vision appears in your window, select "Edit". You may then edit as needed and resubmit the form

Objective and initiative communities overview

In Adaptive, communities can be used to categorize content of the strategy (i.e., objective communities and initiative communities.) This enables you to optimize the user experience by only assigning them to the communities that are relevant for them.

This is especially useful in larger organizations where the number of objectives and initiatives can become overwhelming, especially if they are being created at the division and function levels as well.

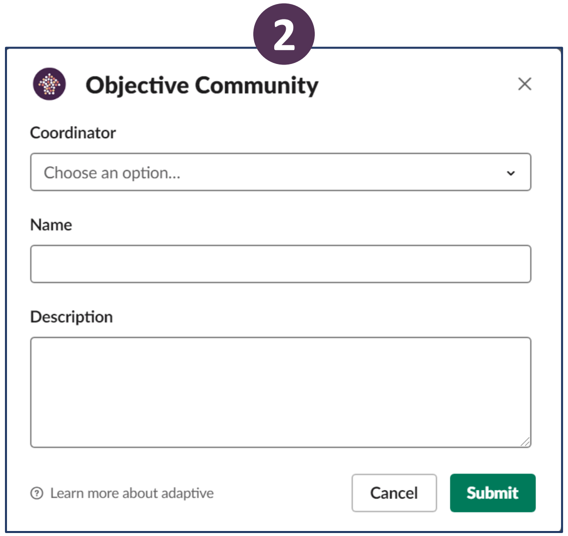
In practice, communities are used in Slack channels where content related to that community can be discussed, and members of that channel will have access to the objectives or initiatives associated with this community.

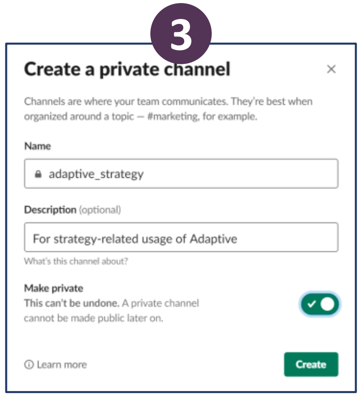
Role	Description
Objective Community	Communities for objectives. These can be used for: • Categories of objectives at the enterprise level (e.g., objectives focused on people may be part of a "Talent Development Objectives" community.) • Organization of objectives that belong to different groups (e.g., "Enterprise-level objectives", "Sales team objectives", "HR team objectives", etc.)
Initiative Community	Communities for initiatives. These can be used for: • Categories of initiatives that are related (e.g., "Technology Upgrade Initiatives") • Organization of objectives that belong to different groups (e.g., "Product development team initiatives", "Finance team initiatives", etc.)

Create objective and initiative communities

To create an objective community:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Objective Community*
2. Fill out the form and click submit:
   - **Coordinator:** Person responsible for managing this community
   - **Name:** Name of the community (e.g., "Sales Team Objectives")
   - **Description:** Description of the purpose or scope of this community
3. In Slack, click the plus sign next the Channels, and create a private channel. (Note that you must have Slack permissions in your organization to create private channels). As a tip, we recommend using a common naming convention for these channels, such as: "sales-objectives", "hr-objectives", etc.
4. Invite Adaptive to the private channel by typing into the chat window "/invite @adaptive"
5. You can then link the community by selecting it from the drop-down menu that appears
6. Lastly, invite users to this community by inviting them to the channel. This can be easily done again with the "/invite" Slack command. Remember, members of these communities will have access to the objectives that are assigned to this community





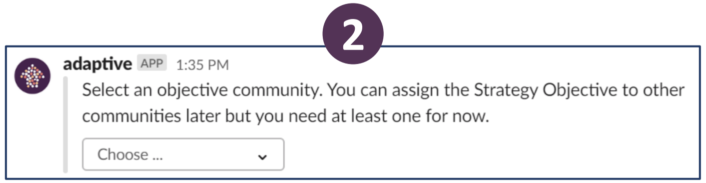
**To create an initiative community, use the exact same steps, but select Create>Initiative Community from the drop-down menu*

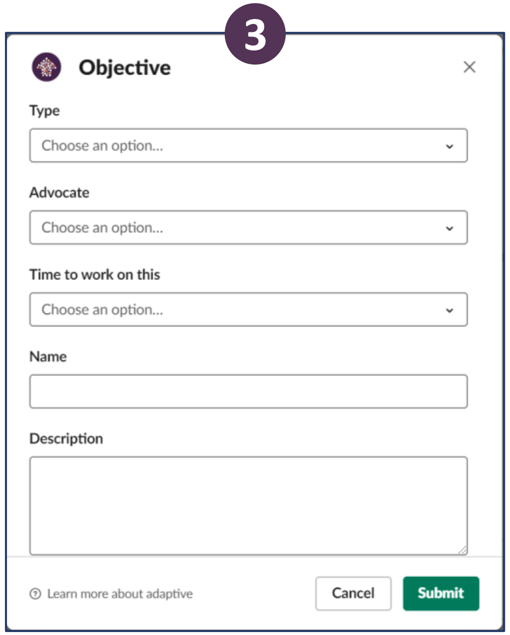
Create / edit objectives

An **objective** is an individual component of the strategy that represents either a desired outcome or capability to be built, that will lead to the achievement of the vision.

To create objectives:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Objective
2. Adaptive will prompt you to select an objective community. These are categories of objectives – for instance they are often grouped by theme or by division. Select the community using the dropdown menu
3. Fill out the form:
   - **Type:** Category of the objective. If not applicable, select "No Type"
   - **Advocate:** Person responsible for ensuring progress and recording updates
   - **Time to work on this:** Duration of the objective (e.g., one year, indefinite, etc.)
   - **Name:** Name of the objective
   - **Description:** The specific intent and scope of the objective
   - **Measures:** How success will be quantified and measured
   - **Targets:** Intended performance for the above measures
4. Once the form is completed, select "Submit"
5. To edit the objective, access the Adaptive menu and select Responsibilities>All Objectives. You can then view your objectives, and select "Edit"





Update progress of objectives

Updates on objective status are recorded regularly by the advocates to understand progress along the way and to create accountability.

To update progress of objectives:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Responsibilities>All Objectives.
2. The objectives you are the advocate for will appear in the chat thread. Select the "Progress" dropdown menu and select "Add/Edit Progress"
3. Fill out the form:
   - **Status:** Indicator of current progress: "On Track", "At Risk", or "Off Track"
   - **Comments:** A brief description of the current status and next steps
4. Once the form is completed, select "Submit"
5. All objective updates will go to the vision advocate, who will be able to provide commentary or feedback
6. In the "Progress" dropdown menu, you can also:
   - View past updates by selecting "Show"
   - Close out the objective if it is complete by selecting "Closeout". If this option is selected, a request will be sent to the vision advocate before this is final.

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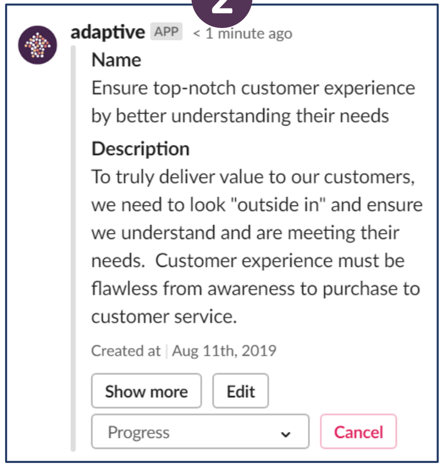

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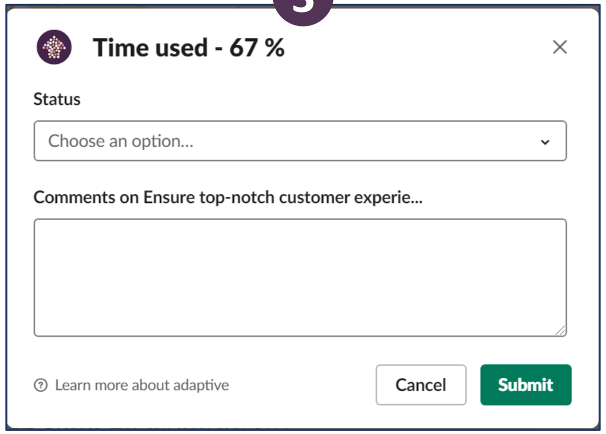

Create / edit initiatives

An **initiative** is a time-bound change project with dedicated resources, designed to help the organization achieve its objectives

To create initiatives:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Initiative
2. Adaptive will prompt you to select an objective community. These are categories of objectives – for instance they are often grouped by theme or by division. Select the community using the dropdown menu
3. Fill out the form:
    - **Advocate:** Person responsible for ensuring progress and recording updates
    - **Time to work on this:** Duration of the initiative (e.g., this quarter, this year, etc.)
    - **Related objective:** The objective that this initiative contributes to
    - **Initiative Name:** Name of the initiative
    - **Initiative Description:** The specific intent and scope of the objective
    - **Definition of Victory:** Intended end outcomes of this effort
    - **Budget:** Resources allocated to this effort (if any)
4. Once the form is completed, select “Submit”
5. To edit the initiative, access the Adaptive menu and select Responsibilities> All Initiatives. You can then view your initiatives, and select “Edit”

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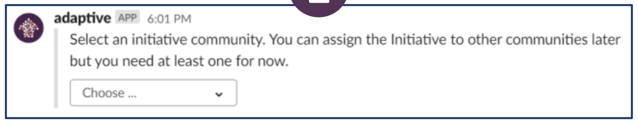

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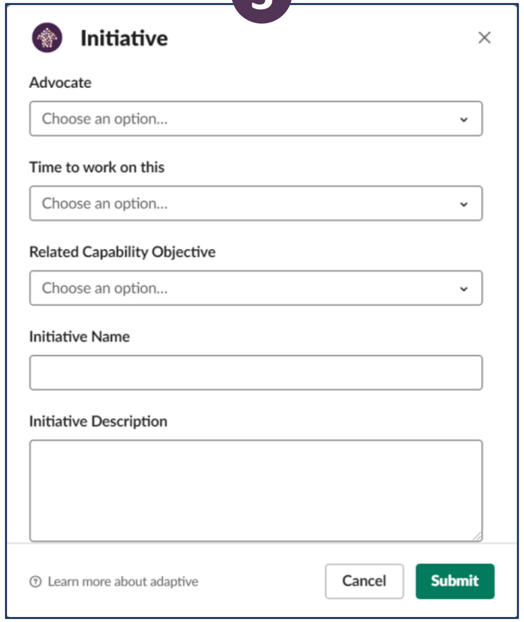
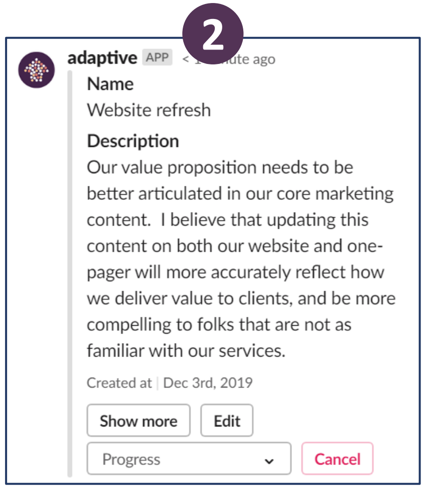


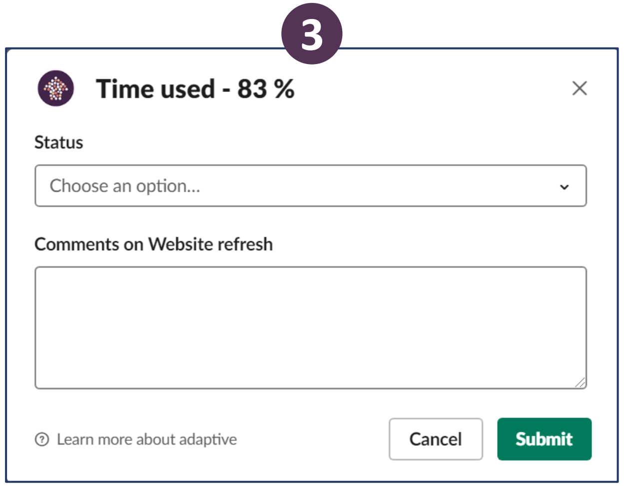
Update progress of initiatives

Updates on initiative status are recorded regularly by the advocates to understand progress along the way and to create accountability.

To update progress of initiatives:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Responsibilities>All Initiatives
2. The initiatives you are the advocate for will appear in the chat thread. Select the “Progress” dropdown menu and select “Add/Edit Progress”
3. Fill out the form:
   - **Status:** Indicator of current progress: “On Track”, “At Risk”, or “Off Track”
   - **Comments:** A brief description of the current status and next steps
4. Once the form is completed, select “Submit”
5. All initiative updates will go to the objective advocate for the objective that your initiative is tied to, who will be able to provide commentary or feedback
6. In the “Progress” dropdown menu, you can also:
   - View past updates by selecting “Show”
   - Close out the objective if it is complete by selecting “Closeout”. If this option is selected, a request will be sent to the objective advocate before this is final





HR

HR – contents

1. HR administration overview
2. Quarterly feedback process
3. Holidays
4. Connecting Adaptive with the performance management process

HR administration overview

- Members of the HR community are responsible for supporting the administration of Adaptive from a people perspective
- Specific responsibilities of the HR community members are:
  - Managing the quarterly feedback process
  - Creating / updating holidays
  - Connecting Adaptive with your organization’s performance management process

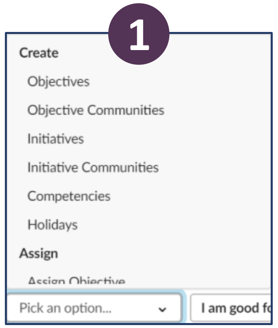
Quarterly feedback process

- A major part of Adaptive is the quarterly feedback process. While only some users are directly responsible for managing pieces of the strategy, everyone can create individual development objectives (IDOs) and provide feedback to colleagues
- Adaptive will prompt users to create IDOs and provide feedback according to the below calendar. Once the feedback deadline has been passed, the HR community team members can review all recorded feedback to ensure it is appropriate – think of this as a quick audit
- Feedback reports can then be shared with both leaders in summary form, and in individual form for each person who participated

	Month 1				Month 2				Month 3			
Activity	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**	**Wk 1**	**Wk 2**	**Wk 3**	**Wk 4**
All users												
All users receive individual feedback reports from prior quarter												
Users are prompted to create individual development objectives (IDOs)												
Users to execute IDOs throughout the quarter (weekly notifications to provide short updates on progress)												
Weekly notifications for users to provide feedback for Q2 (colleagues can provide or request feedback at any time throughout the quarter)												
Quarter end IDO and feedback reports generated												

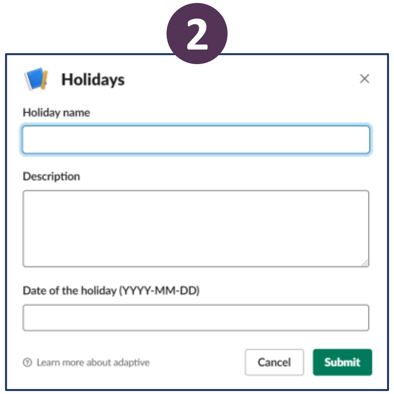
Create / update holidays

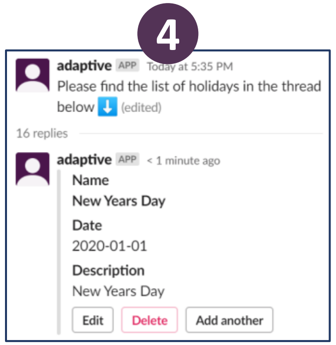
Nobody wants to receive a notification on their day off! In Adaptive, you can enter all the organization’s holidays – when notifications are scheduled to be sent (e.g., a notification for users to update their individual development objectives), if it falls on the day of a holiday it will not be sent until the day after at the regular time the user has designated.



To create / edit holidays:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Holidays
2. Fill out the form:
    - **Holiday name:** Name of the holiday
    - **Description:** Description of the holiday
    - **Date of the holiday:** Enter the date in year>month>day (YYYY-MM-DD) order
3. Once the form is completed, select “Submit”
4. To view or edit the list of holidays, access the Adaptive menu and select View> Holidays. You can then view the current list of holidays and edit or delete as needed. Note that you will need to enter new holidays each year as the exact day for several will likely change





Connecting Adaptive with the performance management process

- Because a large part of Adaptive is about managing individual goals and feedback, it naturally ties into individual performance management
- We recommend aligning your existing performance management process with the use of Adaptive. A few simple suggestions are:
  - For regular performance reviews, a manager can utilize Adaptive to request and collect feedback for their direct reports
  - The manager can then use the individual feedback reports to drive their review discussions
  - Individual development goals (IDOs) are a natural place to create goals that are aligned with the person's overall development plan
  - From an administrative perspective, if you use another HRIS system, store the individual feedback and group-level reports in that system

Competencies

Competencies – contents

Competencies overview

- While the strategy defines future direction for the organization, competencies are its lifeblood
- In Adaptive, competencies are what users specifically give feedback against during the regular quarterly cycle. While strategic initiatives and individual development objectives come and go, competencies are what everyone, regardless of role, should always be striving to build on
- Some organizations also use values in this capacity to make them actionable for people to apply their work to. Definitions of the two terms are as follows:
  - **Competencies** are defined as the skills, traits, qualities or characteristics that contribute to a person's ability to perform responsibilities in an organization
  - **Values** are defined as desired principles or standards of behavior
- Users in this community are responsible for creating and managing competencies on an ongoing basis

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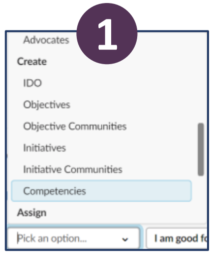
- Users in this community are responsible for creating and managing competencies on an ongoing basis

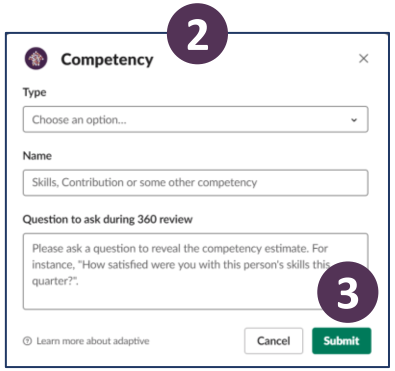
Create / edit competencies

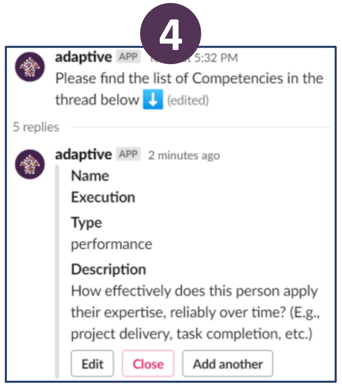
Competencies are defined as the skills, traits, qualities or characteristics that contribute to a person's ability to perform responsibilities in an organization. Also typically used for feedback are **values** – desired principles or standards of behavior



To create competencies:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>Competencies
2. Fill out the form:
    - **Type:** Indicator of if this competency is based on Performance or Relationship. It is best practice to have an even balance of each
    - **Name:** Name of the competency
    - **Question to ask during 360 review:** The question that will be asked regarding this competency when feedback is requested. E.g., for Collaboration: How effectively does this person work with and communicate with others on your team?
3. Once the form is completed, select "Submit"
4. To edit the competency, access the Adaptive menu and select View>Competencies. You can then view the current list of competencies, and select "Edit" to adjust them, or "Close" to remove it





Coaches

Coaching – contents

Coaching overview

- Adaptive is intended to help execute strategy by involving everyone. A big part of this is building a culture of feedback and collaboration, and connecting the organization’s strategic goals with individuals’ goals
- To help drive this, a cross-functional coaching team is available to support individuals with the accomplishment of their individual development objectives (IDOs), and to help them focus their career aspirations in support of the organization’s strategy and team values
- Good coaches:
  - Have a deep interest in helping their colleagues
  - Have unique skills and / or experience from which others can benefit
  - Are well-respected within the organization

Roles & responsibilities

Mission	The coaching team mission is to help improve individual well-being in order to improve organizational well-being. To do this, coaches will support team members with career advancement and skill development in a way that is aligned with the overall organization's goals
Responsibilities	• Build a deep understanding of the organization's strategy and competencies, in order help educate others when needed • Help teammates create good individual development objectives • Mentor teammates on the execution of their individual development objectives • Share best practices on coaching experiences with the broader coaching team
Time Commitment	• Coaches are expected to spend about 20 to 30 minutes per week for each person they are coaching • A coach will typically work with between one and four people per week

Example set of coaching activities

Someone has asked you to coach them on one of their IDOs. Great! Now what?

Below are some suggested activities to provide some structure to the coaching process.

Activity	Frequency	Details
Coach Updates in Adaptive	As needed	When the person you are coaching provides an update on their IDO, you will be sent a notification of this update. You will then have the opportunity to respond with comments or advice.
"Coachee" Meeting	Weekly or Biweekly	Schedule recurring meetings with the person you are coaching to provide guidance based on current progress and create accountability. While Adaptive written updates are great, there is no substitute for live interaction!
Coaching Team Meeting	Weekly	Regular meetings with either the entire team of coaches, or even a subset, are great forums to share best practices and crowdsource ideas. It is also a way for the coaches to be holding each other accountable
Provide Feedback	Quarterly	Make sure you're providing feedback to those you're coaching formally and those you're collaborating with in general for each of the organization's competencies. Coaches are champions of the feedback process!

Resources

Coaches should always be learning! Below is a select set of some of our favorite resources that any coach will find value in.

Book	Author(s)
Adaptive, Scaling Empathy and Trust to Create Workplace Nirvana	Christopher Creel
What Got You Here Won't Get You There	Marshall Goldsmith
Crucial Conversations: Tools for Talking When Stakes Are High	Al Switzler, Joseph Grenny, and Ron McMillan
Just Listen: Discover the Secret to Getting Through to Absolutely Anyone	Mark Goulston

All Users

All Users – contents

1. Overview
2. View strategy and competencies
3. Provide and request feedback
4. Create and update IDOs

Welcome to Adaptive

We are thrilled to have you participating in Adaptive!

Adaptive is a Slack-based tool that is intended to help organizations achieve long-term change by involving everyone. To do this, the goal is to build a culture of feedback and collaboration by connecting the organization's strategic goals with individuals' daily tasks and personal development objectives. You can access a brief introductory video here.

With Adaptive, you will be able to:

- Collaborate and learn from colleagues by providing and receiving feedback
- Create individual development objectives, and align them with components of the organization's strategy
- Receive support from a network of awesome coaches to help build your skills
- Do all the above with support of a light-touch chatbot that will provide coaching along the way

Strategy and competencies

- One of the goals of Adaptive is to create visibility and a stronger connection between your individual development and the overall goals for your team and the organization
- There are two key components that you can view and tie your own individual development objectives to: the **strategy** (including the organization's vision, objectives, and initiatives) and **competencies**. A reminder on key terms is below:

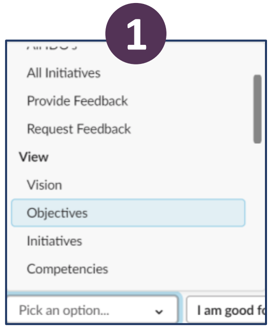
	Term	Description
Strategy	**Vision**	A measurable and timebound statement that articulates the overall strategic direction and end goal
	Objective	An individual component of the strategy that represents either a desired outcome or capability to be built
	Initiative	A time-bound change project with dedicated resources, designed to help the organization achieve its objectives
People	**Competency**	The attributes that embody the organization, that all members of the organization should exhibit and strive to improve against
	Individual Development Objective (IDO)	An action-oriented development goal aimed at enhancing personal skills and capabilities
	Coaching Team	Internal team mentors (regardless of level or managerial position) intended to support individual team members in achieving their IDOs

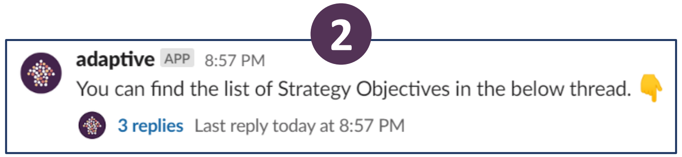
Viewing strategy and competencies

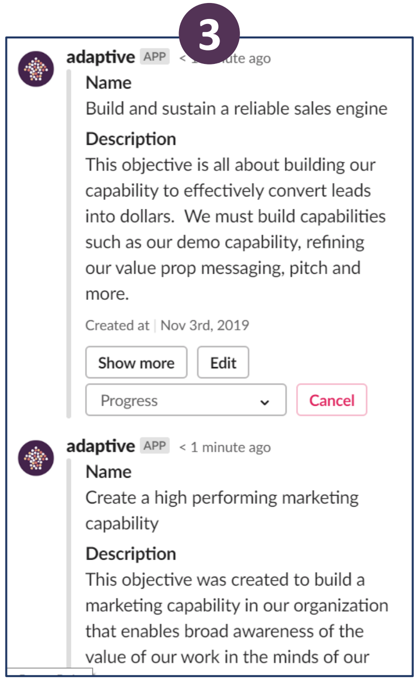
Elements of the strategy and competencies can be viewed at any time in Adaptive, along with visibility into their descriptions, and in the case of the strategy elements the current status of each. Familiarizing yourself with these elements helps to create a better understanding of the organization's overall goals.

To view elements of the strategy or competencies, follow these steps. In this example, we'll use objectives, but the functionality works the same for all elements.

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select View>Objectives
2. Adaptive will reply in your chat window with "replies" in a new chat thread displaying each of the objectives
3. Click the "replies" link to open the thread, where you will be able to view the objectives and their details







Provide and request feedback

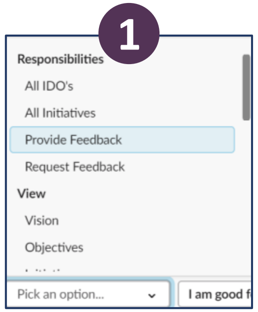
- A critical component of Adaptive is the ability to give and receive feedback. All users can provide and request feedback from colleagues that are using Adaptive
- This feedback is consolidated and delivered to everyone on a quarterly basis to help inform everyone on how to focus their individual development on an ongoing basis
- The next several slides describe how to provide and request feedback in Adaptive, along with a few tips to consider when giving feedback to your team members

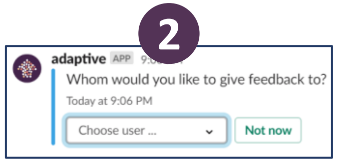
Providing feedback

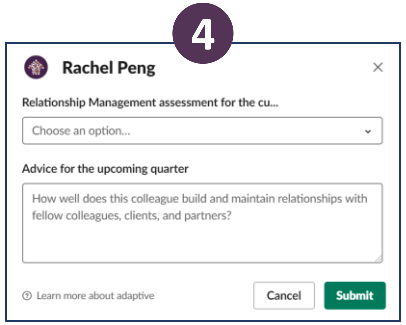
A critical component of Adaptive is the ability to give and receive feedback. This feedback is consolidated and delivered to everyone on a quarterly basis to help inform everyone on how to focus their individual development on an ongoing basis.

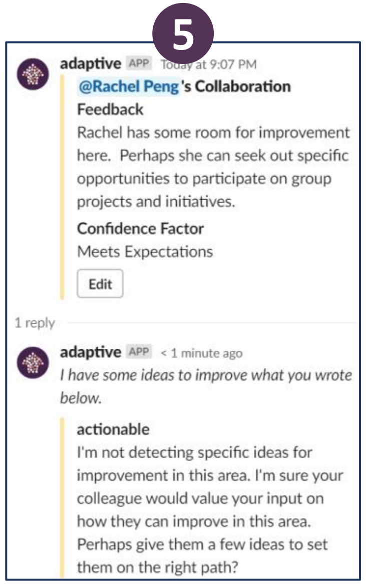
To provide feedback to a colleague:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Responsibilities > Provide Feedback
2. In the next dropdown menu, select the colleague for which you would like to provide feedback. You can either select the person for the menu or begin typing a name into the window for ease of locating
3. You will then be able to select the competency or value for which you'd like to provide feedback for by selecting "I can answer now"
4. Fill out the form and once completed, select "Submit"
   - **Assessment:** Select a rating from the dropdown menu
   - **Advice:** Write out your feedback
5. You will be able to view the feedback you wrote in the chat window. Adaptive may also provide you with some suggestions for improvement (e.g., making your feedback more actionable.) To view this feedback, open the chat thread
6. You can revisit and revise your feedback at any time throughout the quarter to provide updated or more in-depth thoughts. It will be delivered to the person at the end of the quarter anonymously through their summarized report







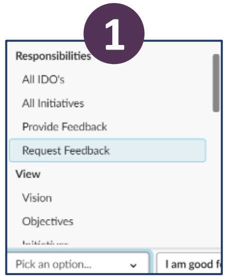


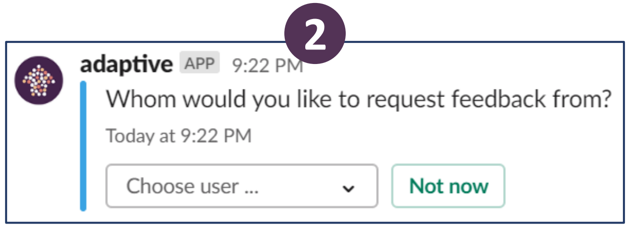
Requesting feedback

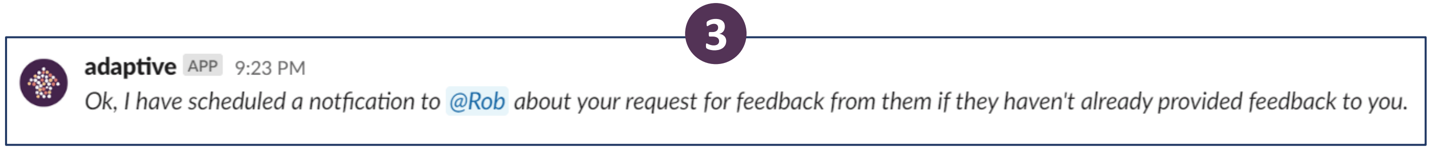
If there is a colleague that you want to make sure provides you with feedback for the current cycle, you can also request feedback. This will send this person a notification that you've requested feedback from them.

To request feedback from a colleague:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Responsibilities > Request Feedback
2. In the next dropdown menu, select the colleague for which you would like to request feedback from. You can either select the person for the menu or begin typing a name into the window for ease of locating
3. You will then see a confirmation that Adaptive will send a message to your colleague that you've requested feedback next time they check their notifications







Types of feedback

- Feedback can be broken down into three categories: **positive constructive**, **negative constructive** and **negative destructive**
- The difference between constructive and destructive is intention. If you want to help someone develop, it’s constructive; if your aim is to make them feel bad for their behavior then you are crossing the line into destructive
- How would you classify these examples?
  - **Example 1:** “You gave a good presentation in the meeting earlier — people found it helpful in the way it was set out, so how would you feel about doing more in the future?”
  - **Example 2:** “Well done for giving a presentation earlier, however I am concerned it was missing some crucial information. What did you do to prepare and how can build on that to avoid it in the future?”
  - **Example 3:** “Your presentation in this morning’s meeting was confusing. The information was irrelevant, and you paused too much, I don’t know why you volunteered to do it.”

What does good feedback look like?

- **Base feedback on a mutually understood goal:** feedback for the sake of feedback is less useful than when it is specifically aimed at a goal – for instance helping someone achieve a desired personal goal or contribute to a specific project
- **Ensure it's actionable:** feedback should be provided with concrete ideas or suggestions for how to address it – come with ideas for a solution, not just the problem
- **Get the length right:** for both face-to-face or written delivery, if it's too short it won't have enough context or specifics to be useful. If it's too long, it risks becoming unfocused or difficult to digest
- **Frame things in a positive light:** even if feedback is highly critical, in the end it needs to be motivating. This does NOT mean sugarcoat; rather consider how to message the feedback in a direct way that the person will be able to receive
- **Make it personal:** many believe feedback should be impersonal. It should be objective to some degree and based on fact, however including personal perspectives can help create deeper empathy and strengthen relationships (particularly for coaching or mentoring)

What observations do you have about this feedback?

One of Jane's strengths is that she is a perfectionist and puts a lot of effort into work quality. One challenge related to that is the efficiency at which she works – at times I've been left in the dark on how long it will take to complete a task or her portion of a project. An overall suggestion is to work on a mindset shift of moving from ideation to getting things done. She can get stuck in the weeds or move off topic, without thinking more tactically about how to bring that idea to action. A specific recommendation is to create more structure in how she gets tasks done, through use of a project management tools and templates. Another thought is she could benefit from sharing drafts earlier in the working process, rather than waiting until the very end when it is "perfect".

I received feedback – now what?

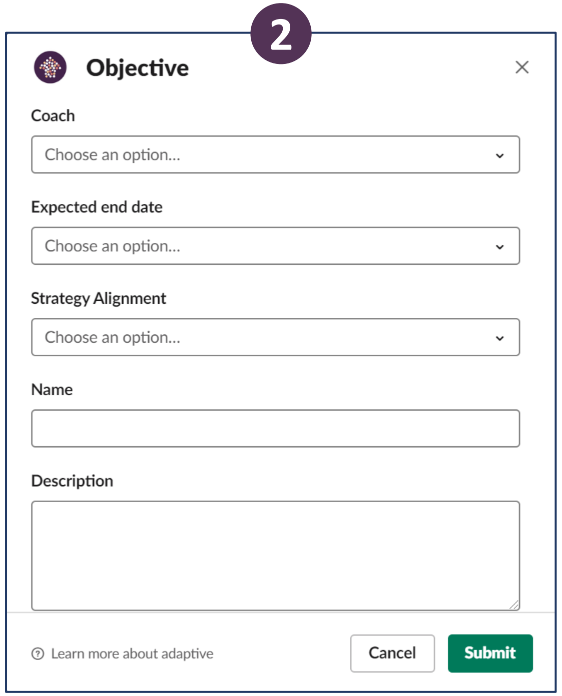
- Your feedback will be consolidated and delivered to you during the first week of the quarter. We recommend discussing your feedback with your manager or a coach to help brainstorm ways to apply feedback to your individual development plan
- Now the next step is to use that thinking to create individual development objectives (IDOs)
- IDOs are how you will track your own personal development in Adaptive on an ongoing basis
- The next several slides describe how to create IDOs, along with a few tips on how to think through creating them

Create / edit IDOs

An **individual development objective (IDO)** is an action-oriented development goal aimed at enhancing your personal skills and capabilities. Ideally, your IDOs will be aligned with either an element of the strategy or the organization's competencies.

To create IDOs:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Create>IDO
2. Fill out the IDO form:
    - **Coach:** Select a coach to support you with this IDO. This person will provide regular guidance to keep things on track. You also have the option to "Request a Coach" if you don't know who to ask, or note "Coach not needed" if one is not necessary
    - **Expected end date:** Select the expected duration of this IDO – when do you expect this to be completed by?
    - **Strategy alignment:** You have the option to link your IDO with elements of the organization's strategy (either at the overall org level or your division's level) or competencies. This is to understand how your work fits into the bigger picture
    - **Name:** Select a name for the IDO
    - **Description:** Describe in a sentence or two the specific intent and scope of what you're trying to accomplish with this IDO
3. Once the form is completed, select "Submit". If you've selected a coach, that person will receive a notification of this request. You will receive a notification once that person confirms that they are or are not available to coach you.

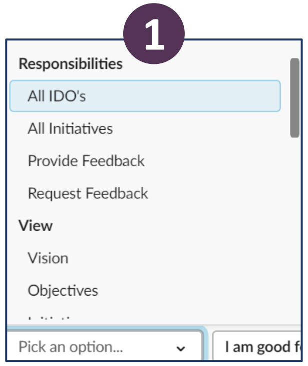


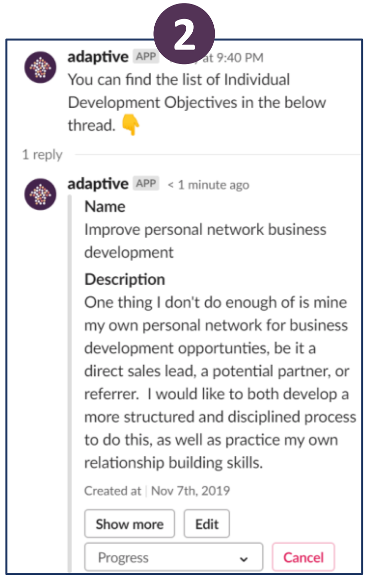
Update progress of IDOs

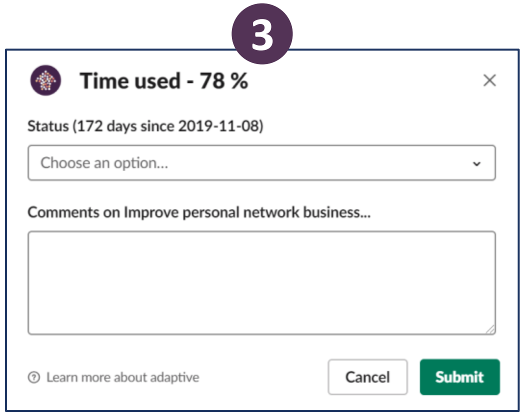
Updates on objective status are recorded regularly by the advocates to understand progress along the way and to create accountability.

To update progress of objectives:

1. Engage Adaptive in Slack via direct message, and on the drop-down menu, select Responsibilities>All IDOs
2. Your active IDOs will appear in the chat thread. Select the "Progress" dropdown menu and select "Add/Edit Progress"
3. Fill out the form:
   - **Status:** Indicator of current progress: "On Track", "At Risk", or "Off Track"
   - **Comments:** A brief description of the current status and next steps
4. Once the form is completed, select "Submit"
5. If you have a coach, these updates will be sent to your coach who will be able to provide commentary or feedback
6. In the "Progress" dropdown menu, you can also:
   - View past updates by selecting "Show"
   - Close out the IDO if it is complete by selecting "Closeout". If this option is selected, a request will be sent to your coach before this is final.







IDO guidelines

While setting individual goals can be tricky, when done right they play a key role in achieving desired results. Setting them for yourself and understanding others' goals also provides more specific collaboration opportunities to help the broader team improve. Below are a few tips to keep in mind when thinking through your own goals:

1. ***Reflect on the past*** – Self-assess and evaluate your level of satisfaction with your current situation. Consider goals you've set in the past, and the impact they've had on you
2. ***Define long-term success*** – even if your timeframe is short-term (e.g., a few months), consider where you want to be over the long-term (e.g., one year or even five years) and work backwards to understand how to get there
3. ***Make it personal*** – Make sure to align your personal and professional goals (e.g. work life balance)
4. ***Get SMART!*** – ensure your goals are **s**pecific, **m**easurable, **a**ctionable, **r**elevant, and **t**ime-bound. These should be precise enough that you can monitor tangible progress along the way
5. ***Prioritize*** – not all goals are created equal. Consider which are most urgent and important for you to make progress on in the near-term
6. **Big picture fit** – consider how these goals fit into the bigger picture beyond you personally. How should they align with your team's goals, and the overall organization's strategic goals?