

PROFESSIONAL SERVICES JOB JARS



THE POWER OF A JOB JAR

IDEAS AND INSPIRATIONS

GUIDELINES

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CARD CATEGORIES

In professional services, over time, three things determine how effectively a team creates a better experience for clients and employees:

- 1) dreaming up fresh ideas and theories,
- 2) finding time to explore, test and grow, and then,
- 3) establishing new habits based on what allows them to deliver excellence, make a profit...and experience(X) has an added requirement:

To create experiences that make people want to continue working with and for your organization for the long-term.

The Professional Services Job Jars were created to make those three things happen with every member of your team, every day.

Sometimes all a working professional needs is a little inspiration, a little nudge. They need a task that's conveniently packaged and can be executed quickly. They need to know the results they should have when it's done. They need an easy way to plan, schedule, and record what they've done. That's how the best learning gets accomplished.

This Job Jar, filled with tasks in the areas of client and employee experience (CX and EX), provides 200 unique ideas for:

- Learning about CX and EX
- Creating better onboarding experiences
- Developing insights about how people experience your brand
- Obtaining feedback from both clients and employees
- Appreciating and recognizing employees and clients
- Engaging people



PROFESSIONAL SERVICES JOB JARS



THE POWER OF A JOB JAR

A Job Jar is a fixture of a home where everyone contributes and everyone benefits.

The Job Jar was once a literal Mason jar full of scraps of paper containing household chores. It was probably invented by a clever stay-at-home mom back in the 50s, and it caught on. Job jars had a way of randomly distributing the work so that no one got crusty about having to do the same chores over and over again.

The Job Jar has become a symbol of shared responsibility and distributing labor equitably while still getting everything done.

Workplace Culture Store has borrowed that age-old concept of teamwork in the family and turned it into a powerful learning tool for professional services teams.

The Professional Services Job Jars include the Project Management/ Business Development Jar and the Experience Job Jar. These guidelines are for the Experience(X) Job Jar. We recommend that you master the PM/ BD Job Jars first before attempting the X Job Jars.

The Job Jar is designed to provide ideas for brief activities that operationalize and advance learning and growth for all team members.

Each card contains a single assignment that can be completed within less than an hour. Many of the activities take less than five minutes, but they are bursting with value! They challenge your team to:

- Stretch out
- Research topics and learn
- Gather feedback and data
- Build their networks
- Practice sketching and scheduling techniques
- Communicate more effectively
- Address client and employee challenges
- Test new theories
- Develop new skills and habits

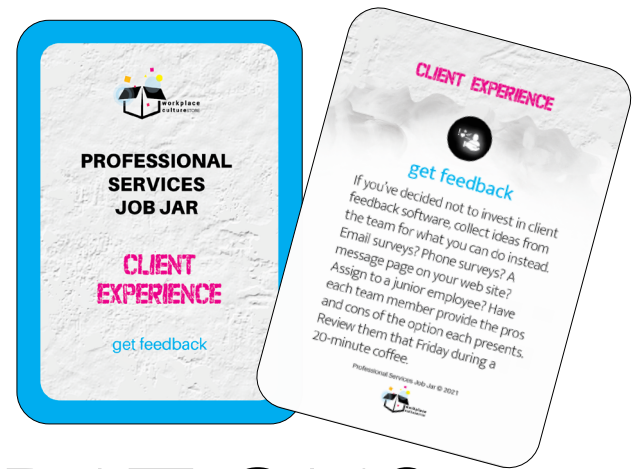
These activities are essential to professionals' careers, and yet also exactly the activities they struggle to find time to do. This is the problem the Job Jars have set out to solve.

The Job Jars:

- **Package brief tasks** for an achievable increment of high value activity. This packaging makes them well-planned and easy to execute, and ensures they produce something useful.

- **Encourage experimenting.** When professionals try new things, they learn a lot about themselves, their habits, and how efficient their processes are.
- **Challenge them to practice.** Practice makes perfect, so project managers and business developers must practice giving presentations, delivering elevator speeches, or sketching a process.
- **Establish new habits.** Young professionals are often thrust into management and business development after years of churning out code or designs in a cubicle. The cards give them ideas for how they can navigate those waters.
- **Supply ideas.** Sometimes thinking up something useful you can do to fill a weekly quota for learning isn't easy. The cards do that for you.
- **Provide the sense of having contributed to the team.** People like being part of a group and doing their part. The cards prescribe activities for just that.
- **Provides something over which they can have full autonomy.** The Job Jars are an excellent way to give a young professional an assignment and let them complete it at their discretion. This is good practice for later responsibilities and challenges.

PROFESSIONAL SERVICES JOB JARS



IDEAS AND INSPIRATIONS

Add some variety to how you use the Job Jar. Here are some ideas and inspirations for mixing it up!

Once cards are complete, have the team drop them into a basket or raffle box.

This allows you to track what's been done throughout the week or month. You can go through the cards and ask who completed which assignment. Generate some discussion. Keep a record and share with upper management to demonstrate progress in learning and development, new skills, and data gathered.

Hold a draw at the end of the month. Pick one card and treat person with the team for cookies and coffee.

Create new assignments on the blank cards.

Blank cards have been included in the decks in every category. This challenges the team to take part in creating assignments. This builds the skill of teaching and mentoring. It also allows you to customize assignments to your workplace culture and industry.

Trade cards.

If the team all picks cards at once, this is an excellent time to trade. Everyone has activities they like more than others, so have the team exchange until everyone is happy.

Use the cards as micro-project management challenges.

Some of the assignments require multiple steps. This provides an opportunity for team members to use some of their leadership skills! Challenge them to draw the steps in the assignment as a flowchart, create a schedule, enlist support from team members, and delegate tasks.

Set goals and celebrate when you reach them.

As a team, decide that you're going to finish a deck or category together. This encourages team work. Once you've achieved the milestone together, celebrate. Celebrations affirm people and reinforce values.

Encourage improvisation.

Let the team modify the assignments. Sometimes they can add some clever twists to make an assignment more valuable and more challenging. Let them. This means they are thinking creatively, and that's one of the best things a young professional can do.

Use the cards to teach negotiation, planning, and self-management.

The Job Jar cards contain safe activities to use for teaching management skills. Invite your team to present their assignment and build a case for how they will expand and execute it. Ask them to explain what value it will have to the organization. Have them identify any resources or time they'll need to do it. This is good practice for later duties in project management.

Recognize those who complete assignments and those who help others do it.

This is the kind of culture you want: teamwork and support. If they do this with Job Jar assignments, they'll do it with everything else. This will cultivate generosity, patience, accountability, and a sense of community.

Expand assignments.

Some assignments lend themselves to expansion. If the employee liked the topic and activity and wants to continue on that path, turn it into a personal learning journey, an internal project, a case study, or a white paper. In lieu of picking new cards each week, have this employee work on their project.



PROFESSIONAL SERVICES JOB JARS GUIDEBOOK



The first rule of using a Job Jar is not taking the rules too seriously.

The cards encourage behaviors essential to growing an X program: learning, exploration, testing things and connecting with others. Those things can't happen without flexibility and improvisation. If your rules for using the Job Jar become too restrictive, the Job Jar won't do what it's designed to do.

A project team has to be able to respond, adapt and make decisions. The Job Jar provides an excellent opportunity for your team to practice exactly those things.

But only if you let them.

FOR MANAGERS

The most important factor in success with the Job Jars is to set guidelines and expectations for how your team will use them. Avoid making any rigid rules, because these conflict with the spirit of the Job Jar, which is to encourage initiative, creative thinking, and accepting responsibility for results.

Here are some suggested guidelines:

Decide on a reasonable frequency.

For a single team member, one card assignment could take **up to an hour** to complete. It might also include add-ons that require more time. If all team members pick cards in a single week, that means all of them could be spending one hour that week on learning and development. If that is acceptable to you, let the team pick one card a week.

If one hour a week per person feels excessive, consider having team members rotate picking a card. That means one team member will be working on one Job Jar assignment per week.

Avoid limiting the exercise to only one round per quarter or year. That frequency has no hope of establishing momentum or new habits. Instead use the cards at least once a month. Any less and you won't realize any benefits.

Do it together.

Use the cards to make your team stronger. Encourage collaboration. Consider choosing one card per week as a team. Work together as a team to complete the assignment. This will spread the tasks across several people and encourage teamwork.

Empower people to use better judgment.

In professional services, time is money. Your people should have some understanding of what is appropriate based on the present workload. Empower them to make wise decisions about the assignments and how they execute them. This is an excellent way to practice granting greater autonomy and helping everyone learn from the experience.

Be flexible and firm at the same time.

If a card is really not achievable for that person or isn't relevant to your line of work or industry, remove it from the deck and start over. But please... avoid throwing the baby out with the bathwater.

Challenge people to interpret the assignment in a way that adds value. Don't let them off the hook because one aspect is slightly off-brand or less relevant. Challenge the employee to modify the assignment accordingly, while maintaining the spirit of the exercise.

PROFESSIONAL SERVICES JOB JARS GUIDEBOOK



Pay attention to the “do’s” and “don’ts.”

A few very important “do’s” and “don’ts” come with the Job Jars. Some are strong suggestions. Others must be followed or the Job Jar will provide no value:

- **Never under any circumstances ask your team to complete Job Jar assignments entirely on their own time.** This tells them that you believe in the assignments, but you would rather not pay for the time it takes to complete them. You are asking your team to take time away from their families to do work (for free) that benefits the organization. Not very generous of you.
- **DO: Set aside time for learning and development via the Job Jars.** Set up job numbers to track that time. If you must, ask people to contribute some of their discretionary time, but no more than you’re willing to match in on-the-clock learning and development time. Keep things fair.
- **Never punish or shame (publicly or privately) a team member** for completing a Job Jar assignment. That will ruin the effect of the Job Jars for the whole team within seconds. If an assignment conflicts with your values or the results are not usable, chalk that up to a learning experience. Remove or modify the offending card.
- **DO: Recognize the assignments as an important part of their growth as professionals.** Thank them for completing the assignments and invite them to share their learning with the group.
- **With the Employee Experience cards especially, avoid the impression that managers are responsible for the experience of the team.** In reality, employee experience is created by EVERYONE.
- **DO: Promote the understanding that everyone contributes to the employee experience of everyone around them.** Managers and team members alike play a role in making a workplace affirming. Together we all create a place where people want to spend their working hours. It’s not just managers who make the place healthy and authentic.
- **Avoid requiring team members to vet every assignment through management** before doing it. Most of these assignments can be completed within a few minutes. The feeling of being micro-managed and not trusted to use their judgment will decimate engagement. It will also cause the team to resent the Job Jar as just another way managers can make them feel less than capable.
- **DO: Provide guidelines.** Be open to questions. If you are under the gun with a project, ask team members to wait until the following week to pick a card. Instead of vetting their assignments, call it a “presentation” on how they will execute it. Empower that employee to express the value in the assignment and negotiate for resources. Use it as a positive learning experience and part of the exercise.
- **Avoid having the team complete assignments without a debrief and discussion later in the week/month.** The learning they achieve, and data they gather will leave them with questions. This is your chance to blend some mentoring with the assignments of the Job Jars. Don’t pass up that opportunity.
- **DO: Plan a 20-minute discussion over coffee at the end of the week.** Devote this coffee break to Job Jar debriefs. Answer the team’s questions. Invite them to express their thoughts on the assignments they completed.
- **Avoid hiding the Job Jar in a locked drawer or secret location. Don’t keep it inside the manager’s office either.** You might think this prevents your people from falling into rabbit holes. We know it’s tempting to exert a lot of control over the Job Jar, but this spoils the opportunity to use the Job Jar to cultivate some autonomy in low risk tasks. It also amounts to missing the point of the tool entirely.
- **DO: Put the Job Jar in an accessible place.** Sometimes team members just want to read the cards for inspiration and ideas. Encourage this. As long as your guidelines for the assignments are in place, you don’t have to worry about the Job Jar becoming a distraction.



CLIENT EXPERIENCE



gain insights

Feedback is good, but without the insights to analyze and act on it, it has no value. When you design your brand experience with insights at heart, you are always delivering what your clients authentically want and need. These cards:

- Introduce concepts in client experience and invite people to consider their meaning
- Spark discussion about client experience and what makes it rewarding
- Provoke thought about each client's definition of a rewarding project experience

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CLIENT EXPERIENCE



get feedback

Client experience data includes feedback, observations, reactions, evidence, and perhaps even off-the-cuff remarks mid-conversation. The challenge is to know an insight when you hear it and always mine its value. These cards:

- Get clients to open up and be honest about their experience working with you
- Provide ideas for new ways of getting valuable and authentic feedback
- Provide activities that encourage transparency and openness between you and your clients

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CLIENT EXPERIENCE



onboarding

The initiation of any relationship is a defining moment. Every interaction after onboarding is a variation on that first impression and an amplification of that moment's feeling. These cards:

- Provide ideas for a more welcoming client onboarding experience
- Get the team involved with making things more welcoming at the start of a project when it really matters
- Adding new steps to the process
- Onboarding questionnaires

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CARD CATEGORIES

CLIENT EXPERIENCE



engagement

Engagement is where an authentic relationship develops between you and your client. These cards explore how to get to know people, their business, and their values. These cards:

- Provide ideas for piquing client interest
- Provide activities for client appreciation efforts
- Suggest ways to get the client involved in what you're doing in the community

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CLIENT EXPERIENCE



communication

Each CX program requires a solid communication plan that is both deliberate and informed. Communication maintains the flow of insights. These cards provide inspiring ideas for ways you can communicate to create better client experience:

- Common pitfalls in communication
- Practice good communication habits
- Make your messages into experiences in themselves

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CLIENT EXPERIENCE



appreciation and recognition

Clients appreciate and recognize what they value, and value is the central objective of professional relationships. They become the collective acknowledgment of what is important. These cards provide inspiring ideas for ways you can appreciate and recognize:

- Appreciate clients for how they provide their business and make things possible for you
- Recognize contributions to the community
- Provide encouragement
- Express and promote gratitude

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CLIENT EXPERIENCE



disruption

It could be a disagreement, a missed phone call, a minor misunderstanding, or a global crisis like COVID-19. Anything that requires you to respond and adapt is a disruption, and it does not have to be fear-inducing. These cards challenge your teams to:

- Act on feedback
- Gather knowledge
- Poll the team on various client experience topics
- Explore client experience concepts
- Embrace diversity and inclusion
- Prepare for change

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EMPLOYEE EXPERIENCE



gain insights

Feedback is good, but it has no value without the insights to analyze and act on it. When you design your brand experience with insights at heart, you are always delivering what your team authentically wants and needs. These cards:

- Introduce concepts in employee experience and invite people to consider their meaning
- Spark discussion about employee experience and what makes it rewarding
- Provoke thought about each individual's definition of a rewarding work experience

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EMPLOYEE EXPERIENCE



get feedback

Employee experience data includes feedback, observations, reactions, evidence, and perhaps even off-the-cuff remarks mid-conversation. The challenge is to know an insight when you hear it and always mine its value. These cards:

- Get employees to open up and be honest about their experience
- Provide ideas for new ways of getting valuable and authentic feedback
- Provide activities that encourage transparency and openness

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EMPLOYEE EXPERIENCE



onboarding

The initiation of any relationship is a defining moment. Every interaction after onboarding is a variation on that first impression and an amplification of that moment's feeling. These cards:

- Provide ideas for a more welcoming onboarding experience
- Get the team involved with making things more welcoming
- Adding new steps to the process
- Onboarding questionnaires

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EMPLOYEE EXPERIENCE



engagement

Employees are shrewd investors of their attention and time – they engage with meaningful things that bring the best returns. Managing engagement creates opportunities to promote trust, and inspire people. These cards:

- Provide ideas for piquing employee interest
- Provide activities to strengthen the team
- Ways to have fun together, blow off steam
- Finding their purpose in the organization

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CARD CATEGORIES

EMPLOYEE EXPERIENCE



communication

Everybody who works for you is accountable for shaping experience, so everyone must speak a common language. These cards provide inspiring ideas for ways you can communicate to create better employee experience:

- Common pitfalls in communication
- Practice good communication habits
- Make your messages into experiences in themselves

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EMPLOYEE EXPERIENCE



appreciation and recognition

Individuals appreciate and recognize what they value, and value is the central objective of professional relationships. They become the collective acknowledgment of what is important. These cards provide inspiring ideas for ways you can appreciate and recognize:

- Appreciate people over their accomplishments
- Recognize contributions to the team
- Provide encouragement
- Express and promote gratitude

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EMPLOYEE EXPERIENCE



disruption

It could be a disagreement, a missed phone call, a minor misunderstanding, or a global crisis like COVID-19. Anything that requires you to respond and adapt is a disruption, and it does not have to be fear-inducing. These cards challenge your teams to:

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CLIENT EXPERIENCE

MAKE LEARNING
PART OF YOUR
CULTURE

CLIENT EXPERIENCE

ERATIONALIZE
GROWTH

EMPLOYEE EXPERIENCE

ENGAGE YOUR TEAM
WITH ASSIGNMENTS THAT
ARE VALUABLE TO THE
ORGANIZATION AND FUN
THE SAME TIME

CLIENT EXPERIENCE

CREATE CLIENT
EXPERIENCE THAT
INSPIRES LOYALTY

CLIENT EXPERIENCE

CLIENT EXPERIENCE

GATHER FEEDBACK
FROM CLIENTS AND
EMPLOYEES

EMPLOYEE EXPERIENCE

TEST NEW
PHILOSOPHIES AND
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RISK SETTING

EMPLOYEE EXPERIENCE

STIMULATE
VALUABLE
DISCUSSION
THAT ENABLES
MENTORING

EMPLOYEE EXPERIENCE

INTEGRATE CLIENT
AND EMPLOYEE
EXPERIENCE WITH
DAILY LIFE

CLIENT EXPERIENCE

BETTER
ONBOARDING FOR
BOTH CLIENTS AND
EMPLOYEES

CLIENT EXPERIENCE

DRAW ON THE
CREATIVITY OF
THE TEAM MORE
REGULARLY

CLIENT EXPERIENCE

INTRODUCE NEW
CONCEPTS AND
ENCOURAGE THOUGHT
LEADERSHIP

CLIENT EXPERIENCE

REINFORCE
LEARNING

CLIENT EXPERIENCE

CREATE
DELIGHT-
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