**Welcome to the Driving Results Instructor Guide!**

*Hi. This is Mack Munro. I'm the creator and author of the Driving Results program which you are going to be teaching, and so before we get into the massive Train the Trainer content that we have, I thought we would spend just a moment talking a little bit about the overview. Now, you'll get this again in the next video, but I wanted to spend a little bit of time also just talking about logistics and also about learning styles and little quirky things that may be an issue. If you would, just take some notes here, and just some things that I think would be important to consider as you roll the program out.*

*First of all, this program, the way we do our Train the Trainer assumes that you have done training before, that you have basic platform skills, and so when I say basic platform skills, what I mean here is that you have a comfort level talking in front of a group of people. You have a comfort level with the material. You also have a comfort level working with people who may or may not be engaged in the learning. You have a comfort level in handling conflict or people that are causing disruptions. I guess we call that basic classroom management, and so we'll talk a little bit about some of the dynamics you'll see in just a minute, but if you don't have those basic skills, I would strongly encourage you to use some YouTube videos on basic training skills. Get yourself comfortable, because the material itself, while it's not difficult and challenging, at least in my opinion, it does require you to be able to build a rapport and build an engagement with the audience. So gain a comfort level with your own platform skills, and then you can blend the material in with that.*

*Now, the second thing to think about is that people do learn differently. So I'm guessing for some of you listening to this, you've done work with learning styles, and so this is a no brainer for you. But maybe just to review, in my experience, and I think what a lot of people agree is that people tend to learn in three different ways. There are some people that prefer to sit back and just have content read to them. They are what we call auditory listeners. They just like to listen. People like this enjoy podcasts and audio books, and when you bring them into a training program, you'll find that they're most comfortable sitting back and listening. The second type of groups are what we call visual learners, which means they learn best when they have things that they can look at, and for them they might enjoy different examples, models, tools, watching you draw on a whiteboard or a flip chart. They see and they learn through watching. The third type of listener, or learner rather, is a kinesthetic learner, which means they enjoy touching stuff, so they will like to do projects together, or when you do simulations, they tend to get very excited with that.*

*Now, the challenge will be, of course, is that you have a mix in every group. You never know what you're going to get, and so what we tried to do when we developed the content is make it a mix of things that will hopefully hit everybody at least once. There's times where you'll do some talking. There is times when you will have lots of tools and models and video clips. We also have skills practice built in there for the kinesthetic learners. So even early on, as you are introducing the workshop, the topic for whatever timeframe you're going to use it in, let everybody know that we try to do something for everyone. So if you're not the kind of person that likes to do training games, don't worry because there'll be plenty of times when you can sit back and we will just talk to you.*

*The technology needed to do this, and we cover this a little bit in the next video too, is of course the data projector that you hook a laptop into. You will definitely need a good sound system, something that is very reliable. As it sits, you don't need to have any Internet connection, but you definitely have to be able to double check and test and make sure those videos work. Now, we have videos that are embedded into the slides.*

*Double check them, triple check them, make sure the sound and everything works perfect, so that's really all the technology that you need. Unless it's a big room, you probably won't need a mic.*

*The room setup, then, is best done if you can have people in small tables. Second best, I find, is like the big U shaped classroom, because you can then work with a person sitting next to you. The one that probably doesn't work well is if you're in a typical hotel setting where they have long rows of tables, those don't tend to work very well, but they'll work. You can make most anything work. I've done workshops where people actually are sitting kind of in bleachers, and that tends to work. So best case scenario, small tables, if you can do it.*

*Now, what we did not do in our Train the Trainer program is tell you how long each module should take or how long the sessions ought to be, and the benefit of licensing the materials as you've chosen to do is that it's up to you. Most companies that we work with can't really afford two full days of training. They can't afford to take, some of them even a half day. And so if you can break it up into chunks, hour long blocks, that's probably going to be best. And so if you can do that by just taking one logical concept, working it a little bit, and then have them come back another day, revisit it and move on to the next, that's probably better. If you were to do this course end to end as it is written, it would be four solid days of training. But I don't know any organizations right now that could afford to take everybody away for four solid days of training. So you have the opportunity to do it the best way that you know how.*

*Classroom dynamics are really how to handle people in a workshop. The longer I do this sort of work, the more I'm seeing a real change in the audience. When I first started doing this years ago, typically we had prisoners, right? People that were told, "You got to go to training." Many of them had been managers for some time, and so they thought they knew it all. They didn't want to be there. They'd seen things over and over. I've noticed in the past probably five years, that trend has absolutely changed. Generally speaking, when we get groups of people who are newly promoted supervisors, which is really the perfect audience for this, they're anxious to be there and they enjoy getting together, so you typically won't have to worry too much about people that just don't want to be there. But in terms of dynamics, truthfully, if you can get people away from their workspace to do this, it is always better. Our best results have typically been when there's a hotel and people come to the hotel offsite because they're very hard to find if their boss or somebody comes in there.*

*Second thing is, set some ground rules. I don't have any standard ground rules for my programs, but I would suggest that maybe as a facilitator you would do that, and the ones that typically come up are, "What's said in here stays in here," which sometimes that's beneficial, but sometimes we want to be able to take something out that we've learned, and maybe that's something you can make a caveat to it.*

*Other dynamics that happen are when people go off target or topic and they just ramble on. You get a few in every group. This is where we recommend what's called a parking lot, and I've seen lots of groups do this. You can just put a flip chart up on a wall and say, "You know what? We'll come back to that later. It's not really relevant now, but we'll come back to it." There are some people truthfully that love the sound of their own voice, and they'll go on and on, and you may have to catch them at a break and say, "Hey, listen, I appreciate your input, but can you just tone it down?" I mean, you may have to just be direct with folks. So manage your classroom, let them know that it is facilitated, which means we don't generally expect you to sit back and take notes, participate and yet don't force participation, because when you force it you're not going to get good outcomes and people are just going to get discouraged. So it's a fine line. If you know your audience, and you probably will if you're teaching this on site, you'll know the right dynamic to kind of set up for yourself.*

*Now, the way the train the trainer guide goes is that there should be three things that you have in front of you if you are going through the program as a trainer to learn. In the center should be a laptop where you can watch the video. On your left should be the handout, the bound guide that has the slides in it, and on the right should be the workbook which the participants will get. And what we've tried to do is design this to where it is very slide driven. Now, that's not typically how I facilitate, but I also realize that for someone that doesn't know the material inside here like I do, because I wrote it, that it's important to have the slides as a guide.*

*And so in your handout, in your bound slide guide, there is a picture of the slide, and then there's room to write underneath, and in some cases there are some points that are very important to make. We've tried to put that in there for you as well. So watch the video, make notes there. Also, you'll notice on every slide, almost every one, there's a page number on the slide that corresponds to the workbook. That's for the participants, so they know, but it helps you as well, so you can stay on track. Have those three things ready. You can watch it, take notes, take notes, and that way when you're facilitating, you can just kind of go back to your notes. And again, if you can do this in small chunks, maybe four or five slides at a time, your prep time will be a lot easier.*

To best use the guide, we recommend you have your computer up and the video lessons playing. Have this guide as well as the participant workbook open as well to take notes. The video lessons walk you through each slide and activity step-by-step. This paper guide with the slides has some of the highlights to hit as well as space for you to add notes.

Before we go into the actual course, here are some logistical suggestions for you:

1. **Participant Communication:** When you've set the date for the session, let participants know at least a month out what dates the program will be held and what the sessions will cover. Here is a suggested email message:

Greetings!

You've been selected to attend the Driving Results management skills training program on ____________ from _________ to _____________. This program is designed to give you practical skills to be more effective in managing your team. You'll find this program to be useful, practical, interesting, and fun!

As part of the program, you'll be taking an online behavioral assessment known as The MOFFA. This information from this assessment will be used in the first two modules and will help you get a better understanding of your supervisory style and how to recognize strengths in others. The results will be given to you during the class. You'll be receiving a separate email from Boss Builders (the company who designed this program) in the coming weeks with the necessary links and instructions.

We look forward to seeing you in the workshop!

2. **Logistics:**

**Materials:**

At least 45 days before the workshop, contact Boss Builders at (931) 221-2988 to order your workbooks and materials. You'll receive a package containing workbooks, and materials for the activities.

**Room Setup:**

The ideal room setup would be round tables where participants can work together. The room should be large enough for participants to move around as there are many group activities in this program. You'll need at least two flipcharts and if possible, whiteboards or at least wall space to tape up flipchart information on.

The PowerPoint presentation will run on PC or Mac platforms provided you have PowerPoint installed. The video clips should be embedded into the slides but be sure to test them before you start the class. You'll need a really good sound system to get the full benefit of the videos.

## 3. Facilitation:

We assume that whoever facilitates this program has experience working with adult learners. We've discovered that audiences generally learn best if you use a variety of training methods:

- **Lecture:** to cover overview of the points.
- **Stories:** to make those points relevant.
- **Videos:** to see the techniques and styles in action. Video clips can be downloaded from YouTube or similar resources. Clips are explained in each training video for the part to show.
- **Skills practice (role play):** to practice using the techniques and skills.
- **Activities:** to work in groups to solve problems using the newly-learned skills.

Our program has all of these elements. You can make it unique to your organization by using your own stories and anecdotes to make the material come to life.

**Things that will turn off your audience:**

- Reading PowerPoint slides to them.
- Going too long without breaks (we recommend 50 minutes of training followed by a 10 minute break)
- Stringing too many days of training together (our program runs 4 days if you did it back to back). Shorter, more frequent sessions are a better option.

If you'd like to schedule a Train-the-Trainer session with a Boss Builder facilitator to help you prepare, contact us at (931) 221-2988.

Finally, resources and support. We have a dedicated portal that you have access to using your email and a password. The portal has all of the resources you'll need. It'll have guides. It'll have helps. Definitely, if you have any questions, you can reach out to any of us here at Boss Builders. Just let us know what the question is, what you're struggling with. Let us call you and walk you through that. You can reach us directly at (931) 221-2988. We appreciate you teaching this material. It makes us happy to know that this is being spread out all over the country and even international, because we believe it's good stuff and will make your lives a whole lot easier. Thanks.

# Driving Results

CREATED BY

BOSS BUILDERS

*Hi, this is Mack Munro and I'm the creator of the Driving Results program which you'll be delivering on site. And what I want to do is to give you kind of a train-the-trainer basic here. And so what you have is a series of videos, one video for each of the modules. Some of the modules are pretty large, so I'll break this up into several videos for each module when it's a large one. You also have a little workbook that has a copy of the slide and room for you to take some notes as I walk you through this. And you should also have one of the participant manuals laid out as well so you can see where all of these blend together.*

*The Driving Results program is made up of tools and models that I've developed over the years as I've worked with different clients. So some of them I created early on, some of them I created as I worked with a particular company that had a specific issue, and because of that issue I was able to make some sort of a diagram or a tool and then we've just captured it and put it in.*

*This program, if it was done end to end, would be about four days in length. There's a lot of material in it. There's a lot of substance in it, and you have the option of doing it in whatever time segments work best for you. However I would tell you that the sequence that it's laid out in, that really should be adhered to because in a way you're learning a topic that is sort of best learned like you would learn math. There's one kind of concept and then the next one builds on the last one. So use the time sequences that work for you, but please deliver it in order.*

*Now the way the program's laid out is that there are some parts of it where you will be doing sort of mini lectures. There then is a lot of tools and models. Many of these, they're all listed on the slides and in the workbook, but if you are comfortable with a flip chart and a pen, I always find, and I do this when I deliver this, I like to draw them as I'm talking about them because sometimes it's engaging to move away from just PowerPoint slides. You know from looking at the program there's a lot of slides. And so some of these, obviously, you can replace the slide with what you're drawing on a flip chart.*

*Then there are opportunities to do what we call skill practice. Some people call it role playing, but most of the time when you say role playing, people don't want to do it. So let them know there's a chance to practice skills. Let them know that this is sort of a lab where it's okay to make mistakes. But once you leave the room and you go out, then it's like playing with live ammo. You've got to be very careful and you've got to know what you're doing.*

*There are also a lot of video clips in the program. The video clips are from TV shows and movies that most people are familiar with. We use the video clips because it's a change in the sequence and also people benefit, I think, from seeing what you're talking about displayed. I'll show you every video clip in our train-the-trainer video and then show you how to debrief it because if, without the debrief it's just entertainment. And there are some key points in every video that I'd like to bring out.*

*Finally, there's chances where they can work on projects together, and especially in module four they're going to be doing a project on a cognitive, on a fish, a fish bone, a ... I'm drawing a blank on this one. A force field analysis. And the data from the force field analysis is going to be used in future tools. So everything again runs on a sequence.*

*Well, the way to set up the room is, in a perfect place, it would be a room that is big enough where you can move around. If you have tables and you can seat four or five people at a table, that always works really well too. If you have at least two flip charts that works best. And then obviously for your laptop, wherever you are projecting the slides, you need to be able to have sounds so that you can project the sound.*

*And then of course at the front, if you want to have a podium, that works. Whatever you're comfortable with as the facilitator. Sometimes this works really well if you have a co-facilitator, so maybe there's another person you want to tag team with, both of you together. Those dynamics you can work out. I just want to kind of cover the material for you.*

*As your participants walk into the room, this slide should be displayed. They know they're in the right room. You can have them sit wherever you want, name tents are good if you want to use those. And then as they sit down and it's time to begin, then it's time to introduce the program.*

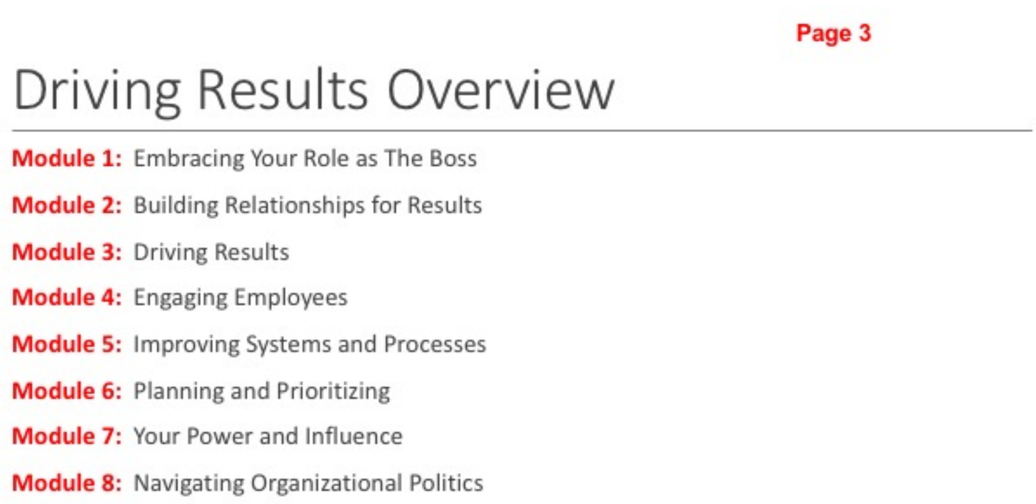
*So this first section I'm going to go through is really the introductory module, which introduces the rest. And so welcome them in. Let them know, hey, for the next two days or one day, whatever it is, we're going to spend time learning some material that is designed to help you be more effective in your role as a manager. You don't have to talk about my background. But if people say, who is this guy? You say he's the one that wrote the program. He's does a lot of this work, he's done of for a number of years, and this is his program and so you'll be learning stuff that has been proven out there in industry.*

**Points to Cover:**

This is your welcome slide.  Greet the audience and let them know how excited you are to work with them!

Go over logistics, lunch, breaks, etc.

Set up your *Ground Rules* here and if you want, a *Parking Lot* (where you can table discussion items until the appropriate time.




*Well then encourage them to open up their books to page three. Now notice on the slides, most every slide has a page number on it. If there's no page number on the slide, it means that material's not in the book and they can either draw it in or it's not needed to be drawn, it's just it's there. But this is on page three. It's the outline, the overview, and this is a chance for you to tell them what to expect. And so you can tell them what I just told you. There'll be some skills practice, video clips and whatnot, but let them know that the introductory module, which you're on right now will take about an hour.*

*We will do breaks. I would always recommend a 50-10 sequence for breaks, so that's 50 minutes of content, 10 minutes of break. It seems like a lot. But in my experience, people run out of attention span about 50 minutes in. Plus having more breaks, you will find people come back on time from breaks because they have more than enough time to handle the crisis outside of work or whatever it's going to be.*

*Let them know that module one is about embracing the role as the boss, and what you learn in module one is like what is expected of the boss. There's some activities. There's some video clips in there. And that module takes about an hour or so to do.*

*Module two is building relationships for results, and one thing you're going to learn in the intro module is that building rapport is the key to being a successful boss. Just let them know that module two is about communication and a chance to use those assessments, the online [inaudible 00:05:56] assessments which you will have their results before the program and then you'll give them to the audience when they are in module two.*

*Module three is the biggest one of the program. It's called Driving Results. That, if it's done end to end, it's about a day's worth of content. I think it's probably the most important module of the program because it's about how to give coaching and feedback, how to develop performance, how to delegate, how to improve the performance of your team. So it's a good module, a solid module, and everything you learned in modules one and two is going to be used in three.*

*Module four is on engagement. It's on motivation. It's a fairly short module. There's a couple of tools in there. But there is an activity in there that is the force field analysis that they'll do as a group, and I'll show you how to run that, and they'll use that data when they get into module five and six. So there's tools that will build on that.*

*Module five is improving systems and processes, which you'll find in module one is a big requirement of the boss, so it's tool-based. There are some activities that they'll do. The tools are fairly easy to teach, and I'll show you how to do those.*

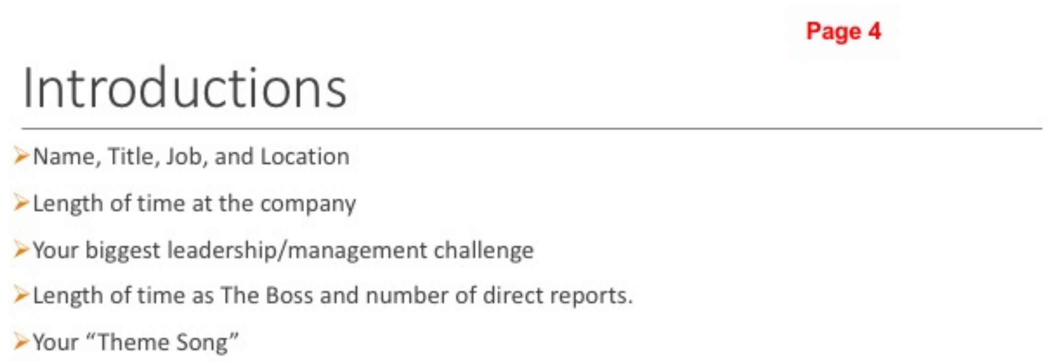
*Module six is more tools, planning and prioritization, time management kinds of things that we know the boss needs. Module seven is, it's kind of an assessment module. There is an assessment on building, on identifying your sources of power and the influence strategies you most commonly use. That is scored in module eight and is a foundation for the final module, which is navigating organizational politics.*

*Now, if you purchased the license for the [inaudible 00:07:27] and its material, it's probably a safe assumption you have a fairly large organization, and any larger organization than maybe a hundred employees tends to have this, kind of this culture where there's politics involved. And as the boss, you've got to learn how to operate in that. And so they'll learn that in module eight.*

**Points to Cover:**

This is an overview of the complete program.  You can let them know what your time and date sequences are. Remember, the program is a complete four-day event but you may be just covering sections at a time.

Tell your audience to hang on to those workbooks for the next session as well as when you schedule your Management Roundtable sessions.




*Once you've gone over the overview, then let them know that we're going to go ahead and actually jump right into introductions. Now, even if the group knows each other, that's totally fine, because you use the introductory module to gain information about that group so that as you're teaching the material, you can refer back to some of their challenges. So the way to do this is to tell the group to find a partner. And there may be, if there's an odd number in the room, there can be one group of three. And what you're going to do is you're going to interview your partner on these questions. At the end of 10 minutes you're going to introduce your partner to the group. You don't have to stand up or anything if you don't want to, but it's a chance for them to get to know each other. And if it is a group of people that you think probably knows them, let them know, why don't you find somebody you don't typically work with and interview them.*

*So the questions are pretty basic: name, title, job location if you have multiple sites and you bring them in, length of time with the company. Just gives you a sense of who's in the room. And then, this is an important one here, and this is where you need to have a flip chart and have them identify their biggest challenge, their biggest management challenge. Like what are they wrestling with now? Because you're going to use that information when we get to module three and do coaching practice. So you definitely are going to have to write that up as they introduce their partner to you. Length of time in the role and how many direct reports. That's a reference for you.*

*And the last one is, is their theme song. So some of them may look funny, like what's a theme song? So tell them that like in a boxing match or a wrestling match, the fighters come down to the ring, there's always a big song playing. So let them know, if you are going to walk into the room, what song should be playing? What's your theme song? And we do that because this is a chance for them to kind of just be a little bit expressive.*

*And so then what you'll do is let them go. So 10 minutes, they're doing it, call it, call them back at 10 minutes and then just let whoever wants to go first. And then you start the sequence. So when they talk about, this is my partner, her name is Sally Smith. Sally has been an XYZ for this many years. Her biggest challenge is dealing* *with the multiple personalities in her department. So you write that up on the flip chart. She has been the boss for six months and she has 10 direct reports. And Sally's theme song is, and this theme song is very typically are things like Eye of the Tiger, We will Rock You, Darth Vader's theme song. Some of them may be songs you've never heard of before and that's okay. But if you can, or if you have a training partner, have them jot down those theme songs.*

*And then at the first break, this is what I like to do is I get my Spotify on my phone and I'll build a playlist of the theme songs. And then at breaks, play their theme songs. I've always really liked this. It's a chance for them to hear their song. It's kind of cool. You can find it on Spotify or Pandora or iTunes, whatever you use.*

*Well, once you're done with all the introductions, then you say, we spent, because it'll take you probably 30 minutes now to do the introductions, depending on the size of the group. Let them know, the reason we spent this much time is number one, I need a better sense of who's in the room so we can make sure this program is something that would be useful for you. We also wanted to capture your leadership challenges because I want you to see that you're probably not alone. Several people have this problem and if possible, we want to address that in our time together doing this program.*

*And then tell them, the reason we wanted the theme song is because we wanted to find out something very unique about you. And one of the things that you'll learn early on in your role as the boss is that if you don't have a rapport with your people, it's going to be very difficult to get them to do anything. And so the theme song is something about you that you want us to know that's a building point for conversation. It lets you know that you're a human being too, and if you can't build rapport, there is a 100% guarantee that what you learn in this program will not work. So building rapport is key. You might want to even write that up on another flip chart. Say goal number one, build rapport.*

**Points to Cover:**

Let this run for 10 minutes.  Participants will introduce their partner to the group.

Using a flip chart, write down what they give as their biggest leadership/management challenges.  You'll use those in Module 3.

Have your partner write down the "theme song" titles.  If possible, make a playlist on *Spotify* or *Pandora* to play on breaks or during activities.  Participants will enjoy hearing their song (provided of course there is no offensive language or lyrics).

**The key learning point is:**

**Build Rapport!**

People feel important when The Boss pays attention to little things.  Nothing works if rapport is not established.  The "theme song" activity is a rapport-builder.

Page 5

# Activity #1

SOLVE TED'S ATTITUDE PROBLEM

*Once they've done that, then let them know we're going to go ahead before we take a break and we're going to jump right in to an activity. And so then you have them turn onto page five and the activity ... and there's a lot of activities. They're all numbered. This one here is solve Ted's attitude problem.*

*Now you will see this again in module three, but the reason I started putting it up early on, I was working with a group of scientific people awhile back and they were prisoners. They did not want to be there. They were just bored. And what I've learned about scientific people over the years is that what they love as a challenge. And so I thought, I'm going to put this activity early, right up at front. And I did it and they didn't love it because they realized how much they didn't know. But I had their attention for the rest of the program. And so I've started as standard practice starting with this activity and then it's revisited again in module four. Or rather module three.*

*So what you do is you say break up into some groups. So whatever you want, maybe three or four groups, four groups, five groups, whatever it works for you. And let them know, know that you're going to have this solve this problem. You are in your office. Somebody says, Hey, you need to do something about Ted. Why? Ted's got a bad attitude. But how do you know?*

*And then these are some of the indicators of the bad attitude. So the instructions for the activity. Tell the group that I'm going to give you 10 minutes and I want you to come up with a plan to address Ted's attitude problem. Now you can use any techniques you want. You can solve like the bad mouth thing, whatever it is, or you can do all of them. It's up to you. 10 minutes and at the end of 10 minutes I'm going to have you read me your plan. Just the checklist. You don't have to role play it. And the group that has the best plan is going to win a very special prize. And if you have like an empty bag, make it like it's really big and you'll find out in a moment what the prize is. And then put them to work.*

*Now could be a time where you put together your little theme song list and you could play it in the background if they want to do it. It just kind of livens up the room a little bit. At the end of 10 minutes call them back and* *say, okay, let's go through again. One person from their group, just read me your plan. And you'll get a wide range of different responses.*

*Typically they'll say, we're going to bring him in. We're going to see how he's doing. We think there's problems at home and so we're going to address this and that. And you say good, good, good. Most of the time they do the time and attendance and then they do the f off on the phone. Those are the most common ones.*

*Well, once you've gone through everybody's response, then tell them, okay, we have a lot of good ones here, but there's only one prize. Only one group gets it. And then it's up to you who you pick. It doesn't really matter because the prize, and you can tell them once you pick the winner, the prize is you have to role play this with me, which actually is you. And then they say, oh no. And you say, but you know what? If it's so good, let's see if it works. So now this is going to require you to do a little role play and play the role of Ted. And so I'm going to tell you up front that Ted is a real problem. And I'm going to tell you when we get to module four what the root of the problem is, but for right now, you just have to walk in there with a bad attitude.*

*So you walk up and say, okay, you told me to come in, what do you want? And you can even knock on the table if you want. They'll say, Ted, come on in. And if you can, put a chair there and see if they ask you to sit. If you sit in the chair, then lean back and just cross your arms and just kind of give them an attitude, right? You can just give them a blank stare or you can make faces at, whatever you want to do, and let them lead in. So here's what they'll say. They'll say, Ted, you know, we've found that you've been late three times in the last two weeks. And you say, no, I wasn't. Yeah, you were. No, I wasn't. Yeah, you were. And then maybe they'll say, we have time and attendance records. And you say, okay, well I wasn't the only one late. Yeah, but we're talking about you. Well, I think you're singling me out.*

*So don't overplay it, but don't fade. I mean, really kind of be adamant about this. When it comes to the next one, they'll say, well, you know, we heard you told our customer to f off. And you say, no, I didn't. Yeah, we had three witnesses. Oh yeah. Who are they? Well, that's not important. So you want to get them on the ropes. You want to get them defensive.*

*And then don't overplay it, but let it run for maybe about seven minutes. And when they get flustered, say, okay, time out. The role play is over. It's very important you stand up and say, let's recognize the group for doing a great job, even though they didn't solve the problem. And ask them, do you think they solved the problem? And they'll say no. And then you say, well, how come?*

*Well, there was no plan. And Ted didn't seem like he changed his attitude. And you say you're right, but here's the reason why I wanted you to experience this. This is going to be a problem that you will probably have to deal with over your tenure, over a lifetime of being the boss. And here's the other thing I'm going to tell you. When we're done with module three, you'll be able to solve this exact same problem in less than one minute. Of course they won't believe you, but when you get to module three, you'll know. I'll show you how to do it. There's some scripting involved.*

*What that should do is let them know right up front, I am not as smart as I thought I was. I really need to pay attention to this. And then you say, now that we've completed that, why don't we go ahead and take our first break. And that's when you can give them a break. And you can put up this slide for module one. And when they come back from their 10 minute break, say let's go ahead, open your book to page six and let's do module one.*

*So what I'll do now is I'll stop the video and then when we open up the next one, I'll walk you through module one and step-by-step what's required. See you in a moment.*

**Points to Cover:**

This is a KEY ACTIVITY!!!

The purpose is to get participants involved in trying to solve a behavior problem. The video gives you facilitation information but if done correctly, any skeptical audience will be immediately engaged.

Let the audience know that one of the key skills they will learn in this program is to solve a problem like this one in LESS THAN ONE MINUTE. This comes in Module 3.

Page 5

# Ted has an "attitude problem"

- Late 3 times in the past 2 weeks
- Was overheard badmouthing you
- Told one of your best customers to *"F#&% Off!"* on the phone *(3 credible witnesses heard this)*
- Seems apathetic and lethargic

Page 7

# Embracing Your Role as The Boss

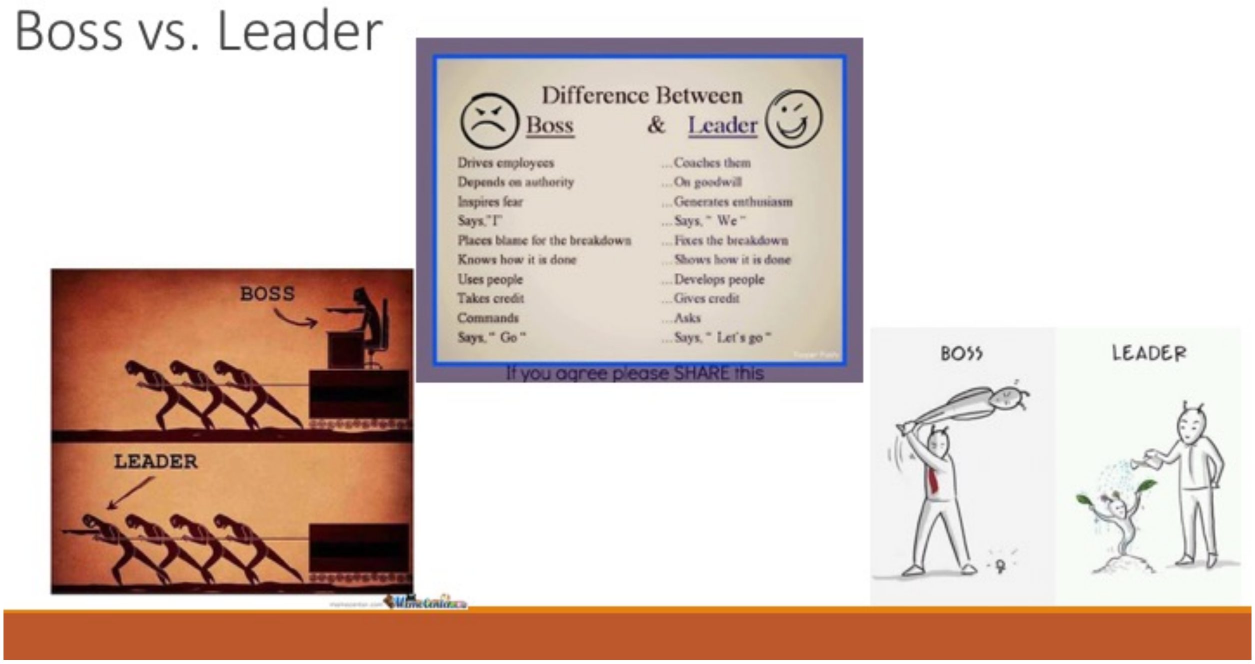
MODULE 1

*Let's get started with Module One. Module One is Embracing Your Role As the Boss. Just like I said in the last video, this program really needs to be taught according to way the modules are laid out. The first module, of course, was the introduction. It gave you an opportunity to get some of the biggest concerns out of the way, and at least document it so that throughout the program, you could address those. We also had an opportunity for everybody in the room to sort of realize right up front that they need this program because that case study with Ted, they probably did pretty poorly.*

*Well, once you've given him a break and brought him back in, it's time to introduce Module One. Module One is the first official module. And we named it Embracing The Role As the Boss because it really gives them an opportunity to think about what they will be doing as the boss. And so, once you've introduced the module and you move on to the next slide, we like to use this one. Now, this is a composite of several memes that are available on the Internet. I've seen all of these on LinkedIn, and if you are teaching this program, you've probably seen them, as well.*

**Points to Cover:**

Before we get into the skills, we need to know what is expected from us as The Boss.




*I like to use this as a place to start the discussion. What I would recommend is you put up the slide, and then ask the group how many of them have actually seen this before. And a lot of hands will go up. And then you ask, "How many of you have actually liked one of these before online?" And a few hands go up. And then ask them, "How many of you have shared one of these?" And if there is usually one or two people, you can ask them, "I'm willing to bet," or tell them, "You had a really bad day with your boss, which made you do this." And they usually agree, because these tend to be sort of passive aggressive ways to protest a bad boss.*

*Now philosophically, we at Boss Builders believe that the opposite of a boss is not a leader. The opposite of a boss is really a boss. In fact, if you look down the column, especially at all those behaviors about a boss, you really can see that in some cases, those behaviors are okay, right? I mean, it's sometimes okay to drive an employee, and sometimes it's okay to depend on authority. And even the one that says take credit. I mean, if you're a boss and your team screws up, if you take credit, which means essentially, you're taking the blame, that's admirable.*

*So, you can get a discussion going. And you'll have many people say, "No, the leader's important." But really, when it comes down to it, you can use this example. The column that's labeled Boss, why don't we think about as maybe, some of the traits and behaviors of a bad boss? So then, what is the opposite of a bad boss? Well, of course, the opposite of a bad boss is a good boss. And so, that's an opportunity for you to make the statement that, "In this program, we are not focusing right now on leadership development. Leadership development is something that comes apart from this program," and we firmly believe that here at Boss Builders, that once you do leadership development, that really needs to be done through the guidance of a coach using 360 assessments.*

*And we, of course, have one of those at Boss Builders. But having a certified, qualified coach work individually to help somebody increase their influence and their leadership abilities. But the foundation is the boss, and that's what this program is. And so, tell them that the opposite of a bad boss is a good boss, maybe a great boss, and that we are going to be working in our time together to help them become great bosses.*

**Points to Cover:**

This is a talking point.  These are common infographics on *LinkedIn* that try to show that a Leader is better than a Boss.

The key point is that what is listed as The Boss, are traits of a Bad Boss.  This program is designed to make you a GREAT Boss.  Leadership development comes after you have the foundations of a GREAT Boss.

The Driving Results program does not cover leadership development but we have recommended resources.

Page 8


*Now, this gives you the chance to do activity number two. Activity number two is where you will let the groups ... Maybe if they're at small tables, have half the room answer one question, and then the other half of the room answer the other. The way this activity works, and if You have flip charts, you can also get them up to have one group at one flip chart and one at the other. And what you're going to do is have them make a list, and you can do this at tables on the flip chart, and say, "Listen, for group A, here's what I'd like you to do. I want you to think about what roles and goals does this organization, this particular company, expect of us, as the boss?"*

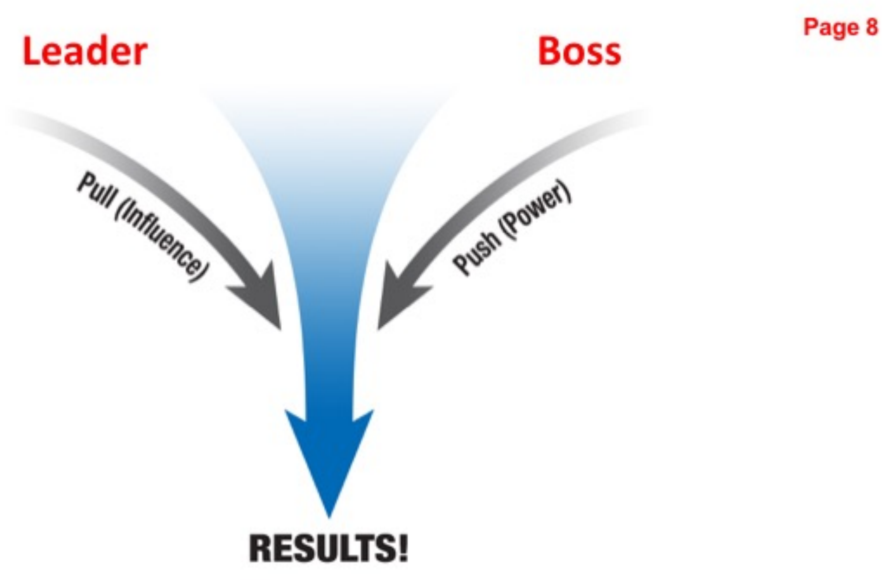
*And when we say roles, we mean like, so let's say for a parent, one of the roles of a parent is to sometimes be a chauffeur, right? Drive the kids all over the place. So, you could use that example. What does the organization expect us to do as the boss? And then conversely, what goals do you think the organization expects me to have for my team, as the boss? That's the organization. And then, the other group, you have a similar question. Only this one, you say, "I want you to think about what your direct reports expect from me, as the boss. What roles do they expect me to play? What goals do you think they expect me to give to the team to be successful?*

*"Tell them you'll give them about 10 minutes, and just go ahead and brainstorm a list. And then when you're done, just tell them to set the list down, or if they're at the flip chart, to go ahead and have a seat. So, 10 minutes on this one. You can set a timer. This could be a chance to, if you want to have some background music, you can play some of the music on the playlist that you captured. Let them do it. And then, once you tell them the time is up, have them be seated, and then go ahead and flip to Slide #7.*

**Points to Cover:**

The key lesson here is that our organization usually expects us to be The Boss (using Power) while our direct reports expect The Leader (using influence).

We need to do both.




*Now, in the book, Slide #7 does not have push and pull and results. So, you could do a couple of things here. You could hold this slide back and draw a diagram very similar to what's in the book, which really would be something like two arrows like this pointing down, and then maybe a little box you would draw. And you would leave this blank. And so, to debrief the slide, what you're trying to show them is the difference between a leader and a boss. There's a couple of ways to do this. The way that I typically do it is, I ask the group, "Let's talk about the difference between a leader and a boss." And then, if you have that up there on the flip chart, you write on the bottom here, where it says results, you would say that the goal of the leader and the goal of the boss is to achieve results.*

*The key here, is that the leader and the boss will do things very differently. And so, one analogy I use is to say, "To help us understand the difference, we are going to think about 1980s martial arts stars." And so, the first one you can reference is, you could say, and ask the group, "How many of you know who Chuck Norris is?" And of course, most hands go up. And say, "Who can tell me what sort of martial art Chuck Norris uses?" And sometimes there's a person that'll know, it's kind of a hybrid form of karate with tae kwon do. And so, if they say that, you say, "Yeah, that's right."*

*And then, if nobody knows, then let them know that. Chuck Norris has a style of martial arts based on karate and tae kwon do. But here's what you need to know about Chuck Norris. Chuck Norris will not be hiding in a tree. If you're going to fight him, he comes right at you. This form of karate and tae kwon do uses power. It pushes, to get the objective done. And that's what you can write in the flip chart. Or, you can pop this slide up and say that, "What we found is that the boss tends to be very similar. They use their power to push to get results. And you will find a time and a place to use power and push." And so, they nod their heads.*

*And then you ask a second question. Ask them, "How many of you have heard of Stephen Seagal?" And a few hands will go up. And then ask, "How many of you know what sort of martial art Stephen Seagal uses?" And* *some will know. But if nobody knows, say that Stephen Seagal uses aikido. Now, let them know, aikido is a very different kind of martial art. Aikido actually causes you, or challenges you to remain steady, and allow your opponent to come at you. And then what you do is, you would use your power to take their power and leverage it against them. In other words, Stephen Seagal, or the leader, uses influence to draw people to them to get things done. And that's what we most often think of as the leader.*

*Now, when people get that, then ask the group that had the boss list, or rather, the list of what the organization wants them to do. Have them read the list. And most often, you're going to get things like this, quality control, get the job done, take care of problems, crisis management, ensure quality. And there may be a few things like develop the employees. And then, once they've read that, ask the group, "What does that sound more like? A little Chuck Norris or a little Stephen Seagal?" And they will probably say probably, a little more Chuck Norris.*

*And so, then you can make the point and say, "You know what we found in most of our research is that even though organizations say they want the manager to be a leader, what they really want is, they want the boss. They want somebody who's going to use power and get stuff done." And then ask the group that had the, what do the employees want, what do the direct reports want. And you'll find things like this. Motivate us, train us, treat us fairly, more softer stuff. And then you can ask the group, "What's that sound more like?" And they'll probably say it's a little more Stephen Seagal. And you say, Exactly."*

*And so, even though the organization wants us to be leaders, most of the time they just want stuff to get done. But, your direct reports, most of the time, they want you to actually lead them and influence them. So as the boss, for you to get the results, you're going to need to have some influence using the pull, some power using the push. What we are going to learn in this program is how to use both, and how to do both of those. Step number one is, we've got to figure out what the role requires.*

**Points to Cover:**

The key lesson here is that our organization usually expects us to be The Boss (using Power) while our direct reports expect The Leader (using influence).

We need to do both.

## Appropriate? (Mr. Clark)

*Now, what we want to do then, is give them some video examples. Now, you will have several video clips in this program. What I'm going to do is, I'm going to play them now so you can watch them, and then I will show you how to debrief them. But the first character we are going to watch is a man named Mr. Clark. Now, he's played by Morgan Freeman in the movie Lean On Me. Now, I'm going to set the scene up for you, and you, of course, can set the scene up for the group. And let them know that in the scene you're going to see, Mr. Clark, the principal at Eastside High, is assigned to take over the school because their test scores are really low. And if they don't get their test scores up, the school's going to be taken over by the state. So, he's in crisis mode. Watch Mr. Clark and see if you think he's more of the boss or more of the leader. And, the big question is, is his approach appropriate? Let's watch.*

*Now, what most people are going to say with that video clip is that, "Yeah, he's really harsh, and yeah, he was really mean, but it was a crisis mode, and so he was justified." And then, I would tell you, ask the group, "How well will Mr. Clark's approach if the school is able to fix its problems? If the school is able to get the test scores?" And then they'll probably say, "Well, his approach would not work anymore." And you would say, "Exactly." That's why it's important that you read the audience and read the situation, and give the right approach when necessary.*

**Points to Cover:**

Mr. Clark needed to be harsh as there was a crisis. Ask the group what would happen if he solved the problem but never adjusted his style.

## Appropriate? *(Mr. Keating)*

*Now, what we'll do is, we'll watch a second video clip. And this is a clip from the movie, Dead Poets Society. Now, very similar to the first clip, this takes place in a high school. But the difference here is that Mr. Keating is going to meet his students for the very first time.*

*Now, watch his approach and see if you think his approach is appropriate. When you debrief this, they'll probably say, "Yeah, It probably works best." And it works best, of course, because Mr. Keating's job is to get the creativity from his high school class, where Mr. Clark is to get compliance from the teachers. And then this is another way to ask it. "What do you think the students in the second video clip were expecting, Mr. Keating or Mr. Clark?" And they'll probably say, well, they probably thought it was going to be Mr. Clark coming in there yelling and screaming. And you would probably then, agree that that would not have been the right approach, even though that's what they expected.*

*And you probably can imagine those teachers in the first video clip were expecting somebody like Mr. Keating, somebody inspirational, maybe a natural leader. But that would not have helped their situation. So, the learning point from these first two videos is that you need to read the audience, and you need to be comfortable with both approaches, the leader and the boss. Later in the program, we will liken those to the boss hat and the coach hat, but that's coming up in Module Three.*

**Points to Cover:**

Mr. Keating needed to engage the creativity of his students. His approach works but would not work if he and Mr. Clark had to switch situations.

Page 9

# Video: Extreme Sheep Herding

*Now, that brings us to our next video. So, you're going to see three video clips in pretty rapid succession. Now, the purpose of the video Extreme Sheep Herding, and the debrief is on page 8 in the workbook, is to show the proper role, the proper place for the boss in an organization. And so, it is a video that's put out by Samsung a number of years ago. It is kind of a silly video, but what you're going to do is, you're going to ask them to watch, and to pay close attention to what they're looking for. So, on page 8 you can see that there's various things they look at. They have to look at the men on the hill, the people on the ground with the walkie-talkies, the dogs, and then the sheep. And then, what you want to do is, let them watch the video, and then see if they can identify all those people. So, let's go ahead and check out the video, and then I'll give you the debrief.*

*All right. Once they've watched the video, the debrief is this, and this is really important. Let them know that what they saw represented in the video is really a representation of how sometimes, the boss has to operate in a large organization. So, ask the group this question. "In your organization, who are the equivalent of the men up on the hill with the playbook and the viewpoint from the hill?" And what they'll probably say is, "That's the executive team." And you say, "Exactly. Their role is to see big picture. Just like the people on the hill had the playbook and they knew where the sheep should go, that's what the executives in your organization are designed to do."*

*And then ask the second question, "In the organization, who are the equivalent of the men on the ground with the walkie-talkies and the whistle?" And they would probably say, "These are maybe, the VPs and directors." And you would say, "Exactly. Their role is to listen to what the executives are communicating from their big perspective. And their job is to communicate that toward the boots on the ground." Which brings us to the third group, which is the sheepdogs. Ask them, based on what they know, what is the equivalent in the organization of the dogs?"*

*And to be honest, that is going to be probably, the group you have in the room with you. They are the supervisors, front-line supervisors, and managers. But their role is important, too. They have to be able to understand what the whistle means, and their job is to make sure the sheep are coordinated, and do that without biting the sheep. And I can tell you from experience when I lived in Australia, if a sheepdog ever bit a sheep, they would probably put the dog down. So, they are required to motivate the sheep without being mean and nasty.*

*Well, that brings us to the last level. And the equivalent in many organizations of the sheep are the regular employees. Now, that's not to say that they're dumb like sheep. In fact, you could even make the point that really, the most valuable group in that video are going to be the sheep. That's where the revenue comes from. So, the job of the dogs then, which is the equivalent of the boss here, is to be able to interpret the whistle, and be able to communicate it to the sheep without biting them.*

*And the sheep do what sheeps do. In this case, it was kind of a silly thing. But in real life, it's getting the sheep to where they can be sheared, which is where the revenue comes from. So, let them know they have a place. And if they want to move up in the role as the boss, then they have to think about what directors do. And most importantly, if they want to up to the CEO level, they have to be able to articulate what they have to do then. So, every level, every promotion, is going to require different skill sets.*

**Points to Cover:**

Be sure to stress this video doesn’t assume employees are dogs or sheep.  It’s designed to show how important each role is and that employees (analogous to the sheep) are the most valuable.


*Well, that brings us then, to another model. Now, it's going to show up in your workbook as just a blank triangle with a flame in there. This is another one that if you are creative on a flip chart, I really would recommend that you would draw it. And simply draw the triangle with fire in it. And let them know that this model is based on a model that's used in firefighting training, and that model is known as the Fire Triangle. Now, the Fire Triangle is used to teach people mainly who are novices, how to fight fires.*

*And it's based on the principle that a fire has three elements, and all three of those elements need to be present to burn. One element is heat, one is fuel, and one is oxygen. When those three elements are together, the fire will burn. When one is removed, no matter which one it is, the fire goes out. And then I always ask the group, "What does that have to do with us? Absolutely nothing." And then they laugh. And then you say, "But, let's think about what kind of fire we want to burn. And this slide," then you can pop this slide up or you can draw it in on your flip chart, and say, "The fire here is a great boss. And we know there's three elements to being a great boss. The first element is the one that probably got you here. And that is, one of your responsibilities is to know how to fix systems and processes."*

*Now, the way most of the people in the room probably got to be a supervisor is because they were really good technical experts. That's a fairly common practice. But let them know, too, you have to be able to continue to build those technical skills. However, you've also got to realize that your job is not to do more of them now that you're the boss, your job is to also incorporate the other two practices of a great boss. The second practice of a great boss is they have this responsibility to protect the house.*

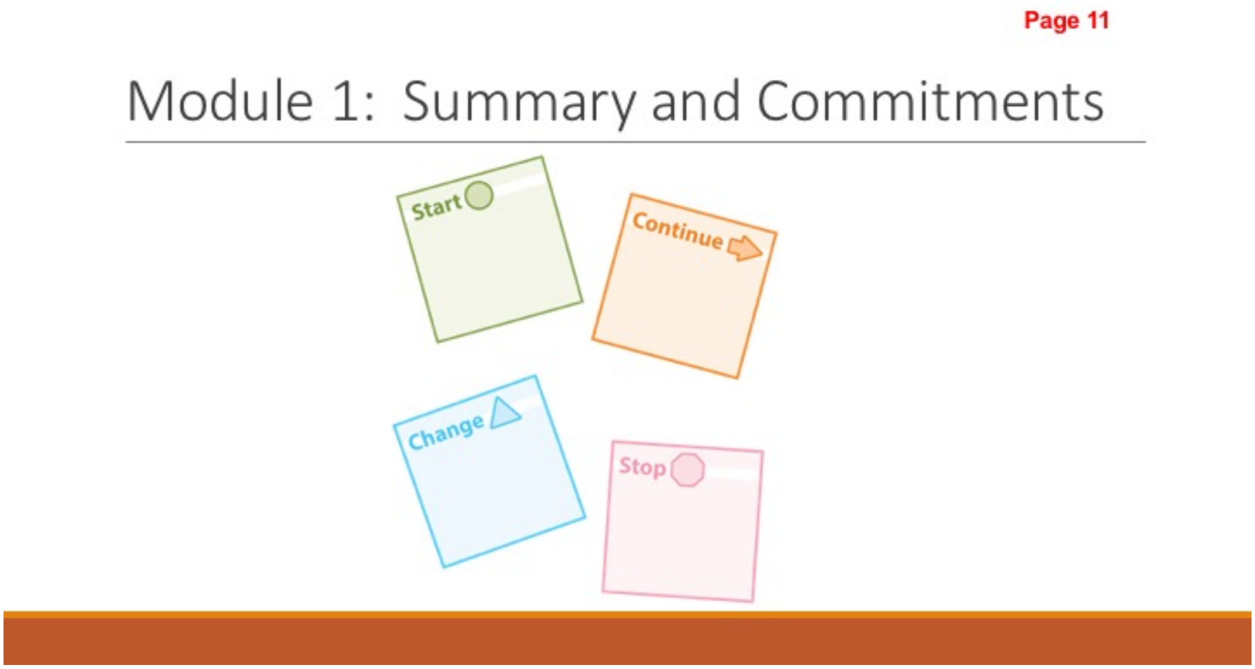
*Now, what we mean by protecting the house is that they are the first line of defense against any threat to the organization. This can be OSHA problems, this can be EEO issues, this can be even issues with customer service. And you see, your HR department is going to rely on the boss to be the first line of defense against anything that's a threat. And this is also an opportunity to let them know, especially if you are a training professional in your organization, that that really boring HR compliance training they have to sit through is designed to teach them the skills to do this.*

*And the other thing that should scare them, and if they're scared that's good. Let them know that just by the fact they sign their name on a roster means they're accountable now. If there's ever an issue that has to go and a jury has to weigh in on it, that the boss is liable. And they'll say, "You either knew or you should have known. You went to the class and you signed in, even if you just fast-forwarded through the slide." So, this is a good time to scare them.*

*But the third element is the one that most bosses are not very comfortable with, and that's developing people. Let them know that in many cases, they were promoted maybe, to sales manager or nurse manager, not just to make sales or take care of patients, but to develop other nurses or salespeople. And let them know that many bosses push back on this. They say, "We are not comfortable. We don't have time." But this is a huge responsibility. And then let them know that the majority of the driving results program that you're going to be teaching them is going to really focus on developing people. And then the later modules are around systems and processes. Protecting the house is going to be done for your own in-house HR training. So, this program only covers the developing of people, and then at the end to fixing systems and processes.*
*But end with this. Make sure they know that, just like the fire triangle, if you take one element out, the fire will go out. So, all three need to be developed. Which takes us to the end of Module One.*
**Points to Cover:**

Just like a fire, there are 3 elements to being a great boss.  This program focuses on Developing People and Fixing Systems and Processes.  Your in-house HR compliance training will emphasize Protect the House.

All 3 elements must be in place for the Boss to be effective.




*Now, Module One, done end to end, is probably about an hour and 15 minutes, depending on the input of the group. But this is what I'd like you to do at the end of every module now. There is a page in the book called Summary and Commitments. And you'll find it has a diagram just like what you see on the slide.*

*Let them know, give them about 5 to 10 minutes and say, "Listen, we are going to go on a break in a moment. But before you go, I want you to take a few minutes and write these down. These are your accountability things. And so, as a result of what you heard in Module One, what are some of the things that you are going to start doing now, as the boss? As a result of what you heard in Module One, what are some things that you're doing now that are validated, but you are going to continue? Based on what you heard in Module One, what are some things now, you know that you need to change?" And finally, "What are some things you learned in Module One that tell you, 'Hey, there's some things that I'm doing that I got to stop doing?'"*

*Use these little fake post-its that are on the page of the thing to write a list in there, and keep that. And when you come back and begin to do your management run tables, have your group bring their workbook, and ask them, "How are you progressing on those goals?" Module One's the foundation. Module Two now, is a large module. And we'll probably break that up into a couple different videos. But that's the one that starts adding some meat on the skeleton that we've created in Module One.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 13

# Building Relationships for Results

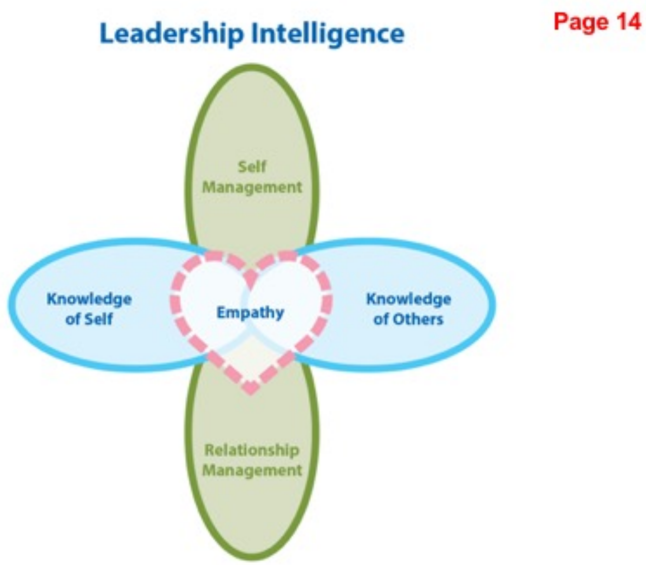
MODULE 2

*Welcome to module two of Driving Results. Now module two is a foundation module to module three, which of course Driving Results is the foundation of the course. It's really the most important module. And so they help you do really well at that. It's important to get the communication skills down, and that's the purpose of module two.*

*Now remember the course should be taught like math. So you began with the introductions and then you had the first module, which is getting people comfortable with the requirements of the role. Now we start getting into the tactical and we begin with module two, Building Relationships for Results. While this slide is up, let them know the importance of the module and then ask them this question. Have you ever met a person who is so smart, they're kind of stupid? And of course everybody's going to laugh.*

**Points to Cover:**

The focus of this module is Building Rapport.  Nothing works until rapport is established.  It's built through relationship and grows through trust.  This module covers basics of communication as well as the MBSP® assessment.




*And then that's your T to get up to the next slide, which is a model on emotional intelligence. And for the purposes of this course, it's kind of referred to here as leadership intelligence, but most people know it as EI or EQ. Now they'll start laughing, but then you ask them, you know, when it comes to dealing with people, there's really some foundational things that you have to get your arms around before you can be more effective as the boss.*

*And so the key here, when you look at this model, is let them know that there's different ways of measuring intelligence. You can ask the group, how do you measure how smart a person is? And they probably will say something like this, an IQ test or the quality of their work. And you say, exactly. IQ test is a way to measure a person's intelligence. But when it comes to the softer side, which in many cases is the more difficult side to master, we want to look at it as a component of emotional intelligence or EQ rather than IQ. And for our purposes here, we also can call it leadership intelligence.*

*Now the goal is to get to empathy. And depending on the group, they may laugh at the little pink heart. But what empathy means is that you are able to put yourself in the same position as the person who you're talking to. And so you could ask the group, you know, give me a definition of sympathy. And they might say, well, I'm sorry that happened or it sucks to be you. And that's sympathy. And it's not bad, but it's not as effective as empathy. Empathy might say, wow, I really can feel your pain. Tell me how you feel. And if we're going to start building better relationships with our direct reports, this is a key beginning piece of it.*

*Now the way that this model works is that we have to start with the first blade of the four blades of the fan. And mind you, this is not something that we created at Boss Builders. This has been around for a long time. But maybe the way we depict it could be a little different. So we begin with the blade of the fan over here. It's called knowledge of self. This is about what you know about yourself, what drives you, what motivates you, what frustrates you. And so ask the group, how many of you have to commute into work on a particularly bad road? And so for example, like up in Connecticut, it might be I-84. And people will say, oh, I have to do it and* *it's terrible. And then you could say, exactly. How many of you have ever felt like giving somebody the finger on that busy traffic road? And of course the hands will go up. And say, you know what? That's what knowledge of self is.*

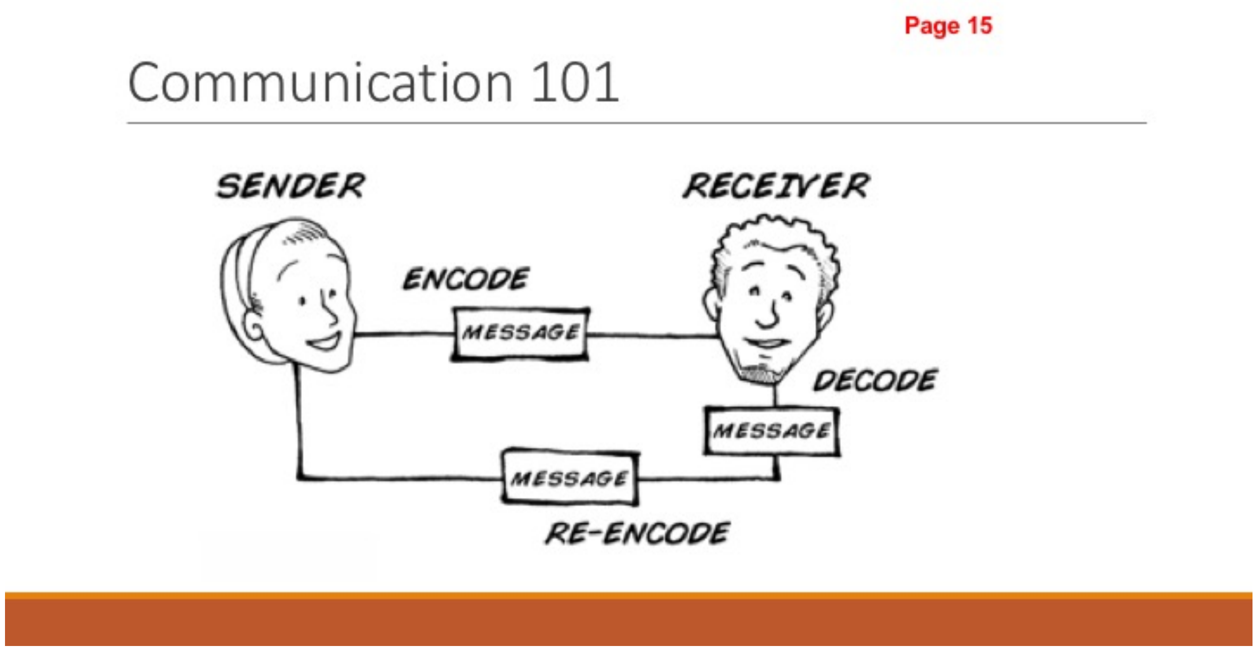
*It means that you know what frustrates you. But the bigger question is how many of you want to give somebody the finger and actually do it? And then you'll get a few people who are honest and that's good too. But you know, it really doesn't benefit you to know that you want to give somebody the finger if you can't control giving somebody the finger. And so let them know, that's the second component. I know what motivates me and drives me, but I also know how to control it. Until we do those two things, we have no business interacting with other humans.*

*But since we'd have to do it as the boss, then the third step is knowledge of others. What do we know about what frustrates others, what motivates others? And once we can do that, then we get to the fourth blade of the fan, which is relationship management. And by doing that, we are able to empathize better. And that's going to be very important as you're sitting down talking to people about the quality of their work and building rapport with them.*

**Points to Cover:**

Emotional intelligence begins by knowing oneself.  Controlling oneself is important.  Knowing others then and blending all 3 of the “blades” is the key to building trust and relationships.

Stress that Empathy is different from sympathy.  It’s NOT ok to feel sorry for someone.  Get into that dark place with them so you can better communicate with them.



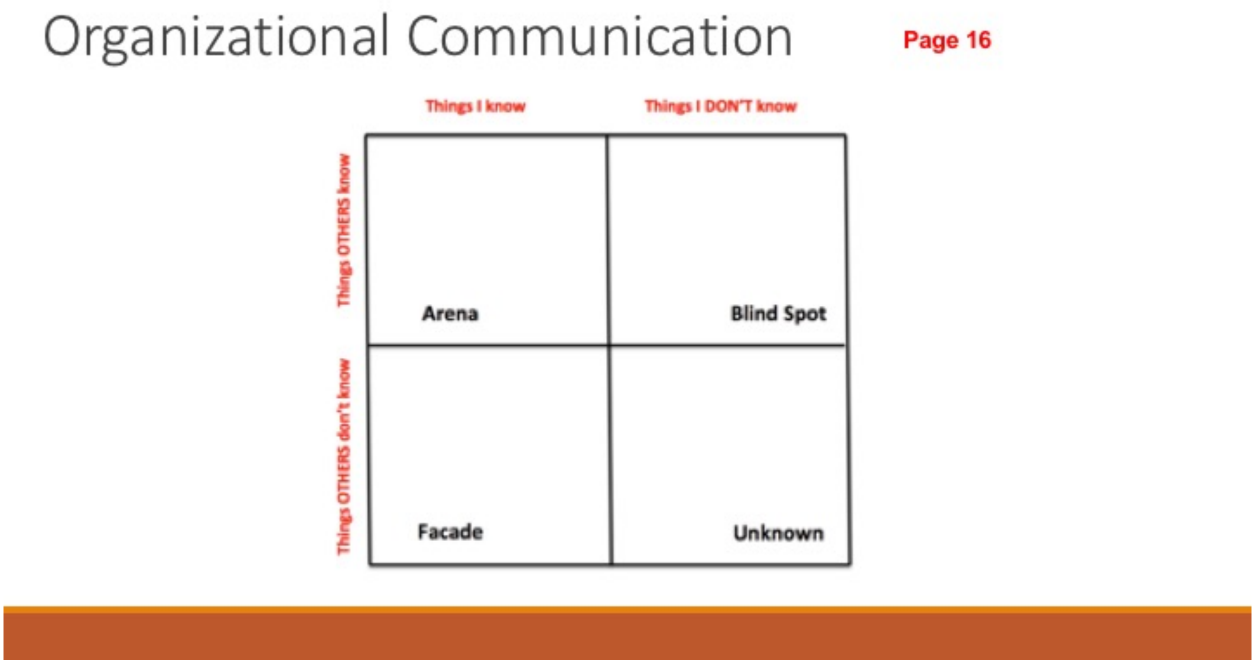

*Well that leads us into the next model, which is a model of communication. And this is on page 13 in the workbook. This is not an original tool. This has been around for a very long time. But the way we talk about it here really has to do with the way a boss has conversations with their direct reports. And it begins by the exchange of messages. And so this center here could actually be the boss and this could be the direct report. And the boss is giving some feedback to the direct report on the quality of their work.*

*So to do that, they would encode the message, which means they wrap it up in a way that the direct report can understand it and then they will get it. They'll unwrap it, the message. They'll think about it. They'll make their response. They'll send it back to the sender, who now becomes the receiver, and the cycle continues. And ask them, this looks very simple, but how often does it work this well? And of course they'll say, no, it doesn't work that well. And you'll say, exactly. There are two main reasons why it breaks down and we're going to look at those. And then later in this module we will take a look at how to have better, more effective one-on-one conversations.*
*But first let's talk about the barriers to good communication. And there are two. The first one is what takes place in a large organization. And the second is what takes place between your ears. So let's go with the organization first.*
**Points to Cover:**

Communication is the exchange of messages.

It looks easy on paper.  In practice it's difficult.  Let your audience know you're going to show them TWO barriers to communication:

1. The organization (using the Johari Window)
2. Between our ears (Using the *Highway to Hell* model)




*And we're going to look at this model on page 14. Now, this is a model called the Johari window.*

*This is not something original to Boss Builders. This has been around since the mid '50s, but what it shows, at least the way we use it here, is how organizations communicate and what causes barriers to communication. And so you can either put this up on the PowerPoint or, more effectively, to draw this on a flip chart and actually take people through it. So drawing it out on the flip chart, you would draw it without all of the words in here, and then take them step by step.*

*Now the way it works that in any organization there are four panes, and pane is spelled p-a-n-e, of effective communication. And so the first pane of our window communication or Johari window contains two things. It contains the things I know, and that's the things I know about myself, my department, my mission, the company, whatever.*

*And then the second thing it contains is that things that others know, and that is your direct reports. And it's what they know about your department and your mission and your organization. So in this box where everybody knows everything, we call this the arena. Because using the analogy of a sports arena, even if you're in the nosebleed seats, you still have a pretty good view of what's going on. And so the more I know and the more you know, the more effective communication can be. This would be the goal.*

*Unfortunately, it doesn't always work that well because there's a second area that we have to look at, and that's this page right here. Now this one contains all of the things others know about me and the department and everything else. But unfortunately for me, it contains the things I don't know. If you've ever said, wow, how come I'm always the last to hear things around here? You're probably in this pane of the window. It's known as the blind spots. The blind spot becomes a problem when everybody knows except for you. It can be dangerous and it can be embarrassing.*

*Well, it still gets worse. Because the third pane of the window is this one down here and this one contains all the things I know about everything. But unfortunately it contains the things others don't know. We refer to this as the facade. And facade is a French word, loosely translated means face. And so you can use the analogy, if you ever go to Universal Studios and take the Hollywood tour, the back lot tour, most of those sets are all just facades. It's the front of a building propped up by two by fours.*

*And maybe the way to use this as an example is to take a famous person who's maybe been disgraced. So one example we use a lot now is Bill Cosby. Before 2015, when you thought of Bill Cosby, what did you think about him? And people say, you know, Jello and Fat Albert and the Cosby Show, of a family guy. But of course after 2015-16, now people think about the things that he was convicted of, of sexually assaulting women. And that was the facade. He knew these things. And yet most people didn't know.*

*And that the scary thing is that bad things can be hidden. But more importantly, for our purposes as the boss, your credibility can go away. And so this is why it's so important, where possible, to be open and to disclose.*

*Well, the fourth window of the Johari window contains two things. It's all the things I don't know and all the things others don't know, which means we call it the unknown. And this is the worst of all. Because if you think about it, when people don't have information, they often fill in the blanks with what they think they know.*

*And it can be something as simple at work as when the executive team makes an unexpected visit or there's people from another company that come walking through, and people automatically assume the company is going to be sold or there's going to be layoffs. In the absence of information, people fill in the gaps. And because that is so important, we want to talk about how to open up the arena and minimize the unknown. And that is your job as the boss. And so make sure you make the point as you're teaching this module.*

*Now you can draw this out on a flip chart or you could simply use the PowerPoint slide here. But what we're trying to get at here is that when it comes to a blind spot, when I'm the boss and I don't know, I need people to be comfortable giving me feedback. Because when I get feedback, what it does is it pushes the arena out this way and minimizes my blind spot, the things I don't know.*

*But conversely, people that work for me should be comfortable being more self-disclosing, sharing things. And so when they do that, it almost becomes feedback for me. It pushes the arena down this way and minimizes the facade. And so if you look at the diagram here, what's really neat about this is if the larger the arena becomes, the smaller the unknown becomes. And the unknown is the biggest barrier to communication.*

*And so maybe you can think of some examples from your own experience that you can share when you did not have a large arena. Or you could share what it's like when there's been unknowns. The program comes alive when you as the facilitator can share your own real life experiences. People are going to remember the stories more than anything else when you teach this program. So feel free to use the stories. That's the organizational communication barrier.*

The key to using this tool is to stress how dangerous the Unknown is. In the absence of information, people fill in the gaps with what they THINK they know.  This one is best drawn on the flipchart.  The debrief version is on the next slide.

# Organizational Communication

Page 16

Page 17

## What went wrong? *First Blood*

*And now we're going to look at the second barrier, and that's the one that takes place between your ears. To do that, what we're going to do is we're going to show a clip from the movie First Blood. Now, I always ask the group, how many of you have seen this movie? And the longer I do this course, the less people have seen this, but let them know we're going to see a scene. This is the very first of the Rambo movies starring Sylvester Stallone. And here's how you set up the scene. John Rambo is come to this town to find one of his friends that he served with in Vietnam. The person has passed away from cancer, and now he's just trying to figure out what his next move is in the town. The sheriff is about to confront him. And watch carefully and see where this whole thing went wrong. Let's watch.*

*So I'm going to show you the clip and the things to pay attention to as you go through this is the way that the sheriff basically is kind of railroading him out of town, paying attention to some of the aspects of his appearance. So watch the clip and then we'll debrief it on the other side.*

*Now this is how you debrief the movie, and it might be really important if you're seeing this to watch the entire movie. You see the thing was, the sheriff was really intimidated. He was really nervous about John Rambo. And thing is, in fact you can ask the group this, what was he so afraid of? And of course the answer is he was afraid that John Rambo would cause trouble. And so then you could ask this question: if you saw the movie, in the end did John Rambo cause trouble?*
*And the answer is yeah. And you'd say, yeah. He burned the town down. So that means the sheriff was a pretty good judge of character. And of course that's not the case. Which leads you to the model on page 15 that we refer to as the highway to hell.*

**Points to Cover:**

In this clip, the sheriff is worried about the stranger who comes to town. The point to make is that it was actually his actions that led to Rambo destroying the town.  Our actions can create a self-fulfilling prophecy.


*Now there is a companion model to this in the next slide, but let them know that this is the wrong way. And you could walk them through the First Blood clip if you want or use a personal example.*

*Typically when we see some, when we walk into a room, the human brain just functions in one way. It looks up and down and side to side. It notices gender and skin color. So what you could do is ask: when the sheriff was driving along, what's the first thing he noticed? And then the audience will say things like his jacket or his hair. And you'll say, no, he noticed it was a man walking.*

*That's what we refer to here as observable data. And this is huge because it's important for us that we take a look at the observable data and not pick out certain things that could lead from our unconscious bias. So you could say the sheriff saw a man walking and then he began to see a lot of things, like his appearance. The flag and the jacket. And you know, you could ask the group, why was the flag and the jacket such an issue? Well, the longer I've been teaching this program, the more people forget that this is post-Vietnam era, 1982 when this took place, where there was still a stigma for Vietnam veterans. And so that was a signal that he was a Vietnam vet. And a lot of people said, you know, they've got issues, they've got problems and they're going to cause trouble.*

*And so if we follow the highway to hell, and the next thing was assumptions. The sheriff assumed he was trouble. He made the decision to harass him and of course threw him in jail. And then he, they beat him up in jail, he flipped out, and then at the end burned the town down. The reason we use highway to hell is that, according to the ACDC song, there's no stop signs, no speed limits, nothing's going to slow you down. And that's the assumption that breaks down communication.*

*So the key here is, be aware when you're selecting. What is tied to your unconscious bias that's coming out to make you look at something. And this can really impact a person, especially if they're going to give feedback to an employee who traditionally has been a troublemaker. So be very careful and make sure you stress the point you have to slow down.*

**Points to Cover:**

For the video debrief, use this slide. The Highway to Hell starts by us reacting to observable data. Problems begin when we select data that comes from our unconscious bias. In the case of *First Blood*, the sheriff had a problem with drifters and Vietnam Vets. He chose to harass Rambo which lead to his self-fulfilling prophecy.

The next model demonstrates how we should handle it.

# The Stairway to Heaven

Page 18


*Which leads us to our second model, which is known as the stairway to heaven. So we're playing off of 1970's classic rock here, but this is actually the right way to do it. So again, we began at the bottom of the stairway with observable data, but then we start being thoughtful about what we pay attention to, being mindful of our own unconscious biases, and then act in a sense of curiosity. And so when we play the scene over, we could say the sheriff saw a man walking. He began to pay attention to his appearance, wondering what was going on versus making an assumption. He could have asked him, "What brings you to town?" "A friend of mine just died." "I'm sorry to hear that. What can I help you do?" "I'd like to get something to eat and then I'll be on my way." That's the wise decision which leads to action.*

*Now the reason we use stairway to heaven is think about this. You're walking upstairs, which means it takes effort and it's tiring. And so let that be the teaching point here. It's very easy to be on the highway to hell. We do it automatically. We do it as the boss because we're busy. But if we take the time to be really thoughtful and mindful, we will make better decisions and improve the quality of the communication. So stress both of those models.*

**Points to Cover:**

The Stairway to Heaven is a harder climb.  It's because we have to resist our unconscious bias and operate from curiosity rather than assumption.  In this model, everyone gets the chance to start fresh, with prior actions affecting our perception of them.

Page 19

# Encoding and Decoding

ACTIVITY #3

*Well now we want to go back to the communication 101 model, and that's the encoding and decoding. What we're going to do is we're going to do a series of activities now. And so there are really two activities. The second activity has three parts to it. And so what I want to do is just kind of show you how they work and explain why they are what they are. And then I'll explain how to facilitate.*

*So go ahead and put this up. Let them know we're going to take a few minutes now. We're going to do some activities that will help you maybe get a better grasp of the encoding and decoding. Remember the encoding is wrapping the message up, sending it to the receiver, who then decoded, which is the listening, and then it re-encodes.*

**Points to Cover:**

We revisit Communication 101. We'll start by looking at Encoding in the next exercise, then continue working in pairs on decoding. The video explains how the activities work.

**Page 19**

## Encoding: The Boss Builder Top 10

- *Mary Had a Little Lamb*
- *Happy Birthday*
- *The Star Spangled Banner*
- *London Bridge is Falling Down*
- *The Hokey Pokey*
- *Jingle Bells*
- *Itsy Bitsy Spider*
- *It's a Small World After All*
- *The Wheels on the Bus (Go Round and Round)*
- *Theme from "Barney"*

*So first thing you do is tell them, okay, I want you to find a partner. And when you find your partner, figure out who of the partner is probably the better communicator. And then they might look at you. And say, go on and get it done. So and then you ask them, all right, where are my communicators at? So you see the hands. The next thing you do is ask them, how many of you know what a playlist is? And then they'll say like on your iTunes or Spotify? You say exactly. And they say, yeah, we know.*

*So then you put the next slide up and say, we have a playlist for you. It's called the Boss Builder Top 10. how many of you have seen these songs? Well, most people will say they have. And then this is what you do. Tell the person who's been identified as the communicator to look at the list and silently ,don't tell your partner, just kind of pick out what your favorite song is up there. And then say, do you have it? And they say, yes. Then say, okay, here's what we're going to do. In a moment you're going to perform that song for your partner.*

*Now they're all going to groan and have a big production out of it. Just say, it's okay. You don't have to sing the song. All I want you to do is tap the song out on the desk and your partner can look at the slide. It'll be one of those songs. And when they got it right, just let them know. And then you say, understand? They say yes. Say, okay, the person that is the communicator, start tapping. When your person guesses it, just put up your hand and sit quietly.*

*And so let them go. And so they'll start knocking on their table. And a few will get it right away and a few will keep doing it. And let it go for maybe about 15, 20 seconds and then stop. All right. You say, all right, everybody stop. How many of you are still working on this? And there'll usually be a few people. And say, okay, well, let's keep working on it. But let me give you a hint. Why don't you try tapping it louder and slower? Okay, go ahead. And so then they'll start doing it and then let it go for maybe 10 seconds.*

*And then say, okay, how many of you are still working on it? And sometimes there's one or two left. And then ask them, is this difficult? And they'll say, yeah. And you'll say, how come it's difficult? And they'll say, because all I hear is taps. And that's when you stop the simulation and say, okay, for those of you who were tapping this* *song out, how many of you could hear the song playing in your head? And of course they'll say yes. And you say, of course. There's no way you can tap it unless it was playing. But as you were tapping, how many of you looked at the person across from you and thought, man, what is wrong with you? You don't know this song. And they all, they'll just say, yeah, we will. And say, this is exactly what happens when you fall victim to the curse of knowledge.*

*The curse of knowledge is when we understand in our heads what we're trying to communicate, but we forget that the other person doesn't have the same context that we do. And there was some research done on using this very activity back in the '90s were very seldom did somebody actually gets the song. And what you can do is you could say, in your industry, are there any acronyms? And especially if it's something like healthcare or finance, they'll say, oh, we got tons of them. And say, exactly. You know the language. But think about the person who doesn't have your experience. The way to communicate is to be able to frame it in a language that they understand because otherwise the message won't happen. So they'll all laugh.*

**Points to Cover:**

The video explains how this activity runs. The key points to make is that if we fail to empathize with the other person, we might forget they don't have the context in the conversation that we do. This leads to a breakdown in communication and there's no way to properly decode.

Page 19

# Decoding

Round 1: Something on your "Bucket List"

Round 2: Something on your "Bucket List"

Round 3: The saddest movie you ever saw

*And say, okay, well now we're going to flip it. Flip it over. We're going to talk about the decoding. So keep in your group of two, and what we're going to do is we're going to do some simulations. And so ask them, all right, the person that was the tapper, I'm going to hand you a card. And on that card are some decoding instructions. Now the person who doesn't have a card, in just a moment, I'm going to give you a few minutes to talk to that person, your partner, about one item that's on your bucket list.*

*And ask them, how many of you know what a bucket list is? And a bucket list, of course, is a list of things you want to do before you die. Well, say, I'm going to give you a few minutes and I want you to talk to your partner. So if you have a card, turn it over. Do not show your partner. Turn the card over and show them what it says. And so these are what the cards look like. You're going to start with the blue one first. It'll be face down and they're going to look at it. And then they'll probably laugh. And say, don't tell your partner, just do what the card says. And then you say, okay, begin.*

*Well the person who's got the blue card is going to be doing what the card says. The other person is going to talk about their bucket list. And just let it run for maybe about 20 seconds or so. And then when they're done, you'll see some people starting to laugh. Say, okay, everybody stop. And then ask the group that was listening and say, if you were ... or talking, if you were talking about your bucket list, how many of you felt like you got listened to? And then they'll probably say no. And so on a flip chart, write down what they tell you. Ask them how did you know you weren't being listened to? And they'll say things like they were looking at their phone, they didn't make eye contact, they looked busy, they looked distracted.*

*Ask them and say, I know this is just a dumb training game. And how many of you were kind of upset? And you'll see people that actually are. And say, okay, well if you want, you can show your partner what the card says. And they'll show them, and just say, a lot of what happened here was what we often call multitasking. We're so busy that we are doing something, but think about how it felt to experience that.*

*And then let them know, okay, we're going to play a second round of this now. And you know what they say about payback, right? And they laugh. And then what you do is you hand that orange card face down to the other person and then you say, okay, just a moment. You can look at the card and see what the card says, but same rules apply. The person that had the blue card, now you're going to talk about something on your bucket list.*

*So tell the group, all right, give orange card, turn it over. Don't show your partner. Let them look at it. Turn it face down again and say, all right, talkers, talk. Orange card, just do what the card says. Begin.*

*Now it's going to get louder because now the orange card says argue with the speaker. So it'll get a little more heated, a little louder. Let it go for about 15, 20 seconds. Okay everybody stop. And then ask, how many of you felt like you got listened to? And some will say, yeah, I really did. And then everybody will laugh, of course. And then say, how many didn't? And so ask them. And they say, well they were negative. They told me my idea was stupid. And then you can let them look at the card and say, there's some people that enjoy a heated conversation. But for many of you, you felt like you were being disrespected. Two very subtle things, one verbal, one non-verbal, can really make a person feel like they aren't being listened to.*

*So with that you say, we're going to play one more round of this game. For this round, the instructions are so explosive, I have to give them to you verbally. So in just a moment, those of you who had the blue card, you're going to come outside with me and I'm going to give you the instructions verbally. For those of you left in the room, I want you to think about the saddest movie that you ever saw, because when your partner comes in, you're going to tell them about that movie. So get everybody to go outside. Make sure you shut the door. And this is what you tell them. You say this. All right, now the group in there probably thinks we're going to do something really bad, but we're going to practice something known as active listening.*

*And then ask them, how many of you know what it is? And most of them will say yes. Say, okay, we're going to do two very specific things though. The first thing I want you to do when you walk in the room is to pay attention to the posture that the person that's going to talk has. And slowly, very subtly, you're going to mirror that person. By mirroring, you're paying attention to the major body movements. So, for example, if you go in there and they're sitting with their arms folded, don't go to that right away. Wait a moment, do it very subtly. If they lean back, wait a moment. You lean back. And the process of mirroring is a really important non-verbal way to build rapport.*

*Then the second thing I want you to do is listen to how they're talking. And when you want to ask them a question, use the same speed, tone of voice, and pitch that they use. So if they're talking kind of low and slow, you ask them a question low and slow. This is a verbal way of building rapport. We call it pace matching. Now you do both of these well, you'll find that they say the conversation was really good and you were smiling and you were attentive. You do it wrong, they're going to think you copied them. So make sure you do it right.*

*And then you ask them, this is very important. How many, are you ready to go? They say, yes. Say, okay. Oh, one more thing. When you go in there, just focus on the techniques. Don't worry about the story they're telling you. Focus on the techniques and see if they notice a difference. Are you ready? Yeah. Okay, let's go. So you walk in the door first.*

*And as they're walking in, let the group know again, all right, in a moment your listener's going to sit down. When they sit down, you are going to talk to them about the saddest movie you ever saw. So when you are seated, you may begin. And then let them begin and just kind of observe. And you're going to notice very* *quickly that the conversation seems normal and natural and you'll see people begin to get into it. With a sad movie, some people, I've seen them start to cry about it, and it's really kind of funny to watch this. Let it go for maybe about a minute this time, maybe a little longer, and then call them together and say, all right, if you were talking in round three, did you feel like you got listened to? And then they'll say, yes, we did. And then ask them, all right, how did you know? And write these on the flip chart. They'll say they made eye contact. They were nodding. They were empathetic. They were smiling.*

*And it's funny because you knew this was going to happen. And then you say, okay, so better experience. They say yes. Then say, all right, from the group that was outside with me, who can tell the group the first instruction that I gave you. And somebody will say it was mirroring. And say exactly. And then explained to the group what mirroring is. And then ask them, all right, somebody who was outside with me, what was the second instruction that I gave? And they'll say pace matching, and let them explain it. Then you can of course explain it as well. And just say, the combination of these two things really fill out communication. You can reference, I think it's on page 17, the Mehrabian studies from the 1960's, and what they basically said when Albert Mehrabian at UCLA was studying communication and influence through communication.*

*He found that when they were doing the research from his studies, only about 7% of the success of the communication came from the words. 38% of it came from the tone of voice that was used and that is where we can link it to pace matching. But 55% was due to the nonverbal, which we had linked that to the mirroring. And so if we want to increase our communication, it's best to do it in person with the techniques.*

*And then if you want, you can walk them through the list and say, you know, eye contact may not be appropriate in certain cultures, and sometimes when you're one-on-one you can use the technique of gazing instead of staring. So in gazing, basically your right eye talks to their right eye and then maybe you look away. Now your left eye talks to their left eye and then you can look away. Practice that in a mirror and let them know that it's very subtle, but it makes a difference.*

*Sometimes nodding, it could be gender difference. There's studies out there that say that when women nod, it means they're in agreement. I'm sorry, when men nod, it means they are in agreement. When women nod, it means they're hearing you.*

*And then the last stage. You wrap it up. Say, one more thing. For those of you who were outside with me, what was the last instruction I gave you? And somebody will say, you told us not to pay attention, right? And I said, exactly. How many of you disobeyed me and listened? And all the hands go up. And then you could say, why did you do it? And they'll say, well, it was just interesting. And you say, you know, I threw a curve ball at you too. Because I have found when I go into a conversation and I am really intent on paying attention, I will be a better listener. So same rule applies. And for those of you that don't feel comfortable with one-on-one communication, trust me, it goes much faster when you're able to do the techniques.*

*So that leads us then to where module two transitions and we start to work with the MBSP assessment. So we're going to stop it now and then we'll pick it up and we'll go over how to debrief the MBSP using the video clips.*

**Points to Cover:**

The video explains the activity. These are the cards that will be passed out for Rounds 1 and 2. For Round 3, take the listeners outside and explain how Mirroring and Pace-Matching work. That is their instructions (no cards)

Round 1

**Act bored, distracted, and disinterested in what the speaker is saying.**

Round 2

**Argue with the speaker. Contradict and criticize them and their story.**

Page 20

*We're going to go ahead and start with the second chunk of module two which is building relationships for results. This is a really big module, so we'll probably end up doing this maybe in four segments. So you saw at the beginning we went talk about the communication exercises and the communication model, stairway to heaven, highway to hell. The next phase begins with this slide here.*

*Now before I explain how to explain this, before your attendees have gone to the program, they should have completed their online assessment, which is the NBSP. Now, what will happen is that when we get a roster of people that are getting ready to attend your class, we'll notice in workbooks and we'll send them the email links so they can go online and take the survey. They will not be able to see their results. What we will do when we ship the books to you is to ship you their results and what I'd like you to do is to hold onto those results. Don't let the attendees see them until I let you know as we've walked through this particular module.*

*We start with this because this actually represents humans in the room. It is a topiary. You find these at a lot of places. But I like to use the one here at Disney. And the way to explain this is to let them know that all of us are a lot like this. A topiary is a chicken wire framework that has a plant growing inside of it. And so as the plant grows and weaves its way through the chicken wire, it fills out the form and then the gardener of course will trim it and prune it and they'll pack and flowers and moss. And so would it becomes is actually a living, breathing plant that looks a lot like Mickey Mouse.*

*And so the way to debrief it is to say that we are like this because just like the Mickey Mouse bush, there are two parts to who we are as humans. The first part is what we call the essential self. And that is represented here as the bush inside of the chicken wire. And the essential self, it contains a lot of things. It's our hardwired personality preferences. It's our behavior patterns that are comfortable. It could be our values, it could be our religious upbringing to be our family of origin. Basically it is all the things that are unique to us and represents the very best of who we are. That is our essential self.*

*Now the second thing that we see represented here is the chicken wire, which are equivalent is what we call the social self. The purpose of the social self is do keep the essential self in check. So I always ask the groups and you can do this too, what do you old people and little kids have in common? And of course the answer is, they don't really have filters and and that's true. You see old people don't really care anymore, little kids don't know any better, but for most of us we're in the middle. We know that down deep inside we'd love to make a comment in a meeting, but we know that we can't and that's the social self.*

*Folks, the danger is that when you lose sight of the social self or that the essential self, you start to realize that the social stuff is you and that's fine until one day because of some circumstance the social self goes away. So we find this most often when somebody loses a job or has a career change that is forced on them. You see this with professional athletes who no longer can play the game. I see this all the time with military folks who end up retiring and they don't have that comradery.*

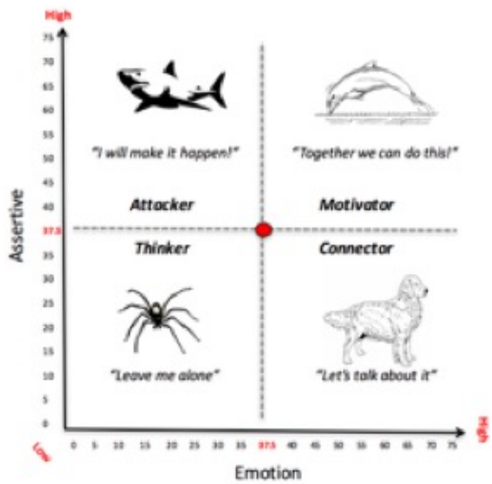
**Points to Cover:**

This part of the module focuses on the MBSP® tool and data. You will have all of the results and will hand them out after working through all the slides. Have attendees guess which style they have before you hand them out.

The key to using this photo of Micky Mouse is to stress that this is a topiary. It's a live plant inside a chicken-wire frame. Our essential self (MBSP® results) are like the plant. The chicken-wire is how we associate with others (our social self). We have to know our essential self to bring our very best to our management role.

The MBSP™

Page 21




*You lose sight of who you are on the inside. This part of module two helps us build in more of what's on the inside because that represents the true strength of who we are. So what will happen is you'll go through this and then you'll show this next slide. All right, and they may have already seen this and so what you do is just kind of explain how this tool works and let them know that, "I have your results and I'll give these to you after we've gone through all four of the styles. But what I'd like you to do is we work through these together and see if you can pick out which one sounds most like you."*

*So the way it works is it measures on two dimensions. The first dimension on the Y axis is your comfort level with assertiveness. Somebody who is highly assertive is somebody who's very comfortable just telling people what they want. And there are some gradients of assertiveness. Now on the other hand, going back, you also have people who are lower in the assertiveness. They're not as comfortable letting people with... They're not comfortable telling people what they want. They are more comfortable asking for what they want. And that is more on the reflective side, less assertive.*

*Well, the second piece of this of course, is your comfort level with emotion that's on the X axis. And so there are some people who are quite comfortable expressing emotions and there are others that sort of keep it inside. They're more of a closed book. So based on how you answer the assessment, assertive questions and these emotion questions, you will be identified in one of these four quadrants.*
*What we're going to do is we're going to look at all four of the characters. We're going to look at them initially through three lenses. And then I'm going to ask you which one you think sounds most like you.*
**Points to Cover:**

The video explains how this model works. They key is to know the difference between comfort in being assertive (telling others what you want) and comfort showing emotion (allowing others to know us). This balance will put most people into one of the four quadrants.

You will take them through each of the styles. Have them identify which one sounds like them. The compare when you hand out the results just before the activity.

Page 22

## Sharks

**Quest:** Control

**Style:** In Charge

**Fighting Words:** “Let’s wait and see”

*Let's start with character number one. This is the shark. They are high on the assertive and they are low in the comfort level of showing emotion.*

*Well, we look at these in the first three lenses, the quest, which is what motivates and drives them. The style, how they tend to show up at work and the fighting words, things that really make them mad. So with the shark, remember high, assertive, low emotion; their quest is for control. They like to be in charge of things and they will take control when nobody else will.*

*So think about a group of people and trying to figure out what to do for lunch. "What do you want to do? I want to go to McDonald's now." "No, I don't want McDonald's." "What do you feel?" "I feel like Burger King. Ah, I don't feel like Burger King. Where do you want to do?" And then the shark steps in and says, "You know what? we're all going to Wendy's." "Oh, I think not," "We're going. Let's get in the car and go."*

*They take charge. So that's the style. They show up typically taking charge. Fighting words for them are when somebody very subtly says, "Why don't we wait and see?" You see the sharks are all about action, getting things done and when they are told, "Hey, hold off, we got to have a meeting," that really annoys them. So we don't want to use the fighting words to stir them up, want to use the fighting words to avoid getting ourselves in trouble.*

**Points to Cover:**

Sharks are high in assertive but low in emotion.

Page 22

## Sharks you may know

*Now for each of the styles we have representation of people in the media and history that I think probably give us the characteristics of sharks. And so one here is a historical, we have one political, one a couple of TV folks. And the thing to note here is that they've not taken my assessment, what we look is their kind of their traditional behavior patterns, which sound a bit like shark.*

*So with General George Patton, hero of World War II, commanded Tank battalions in Europe. One of the things that annoyed him [inaudible 00:06:32] is when he had to play politics. When he wanted to take an objective and he was [inaudible 00:06:36] a hold off and let the British get this one. Pat even got so fed up with the bureaucracy and he didn't like the Tank commander uniform. So he created his own. He got a Green Bay Packers, his football helmet, tall riding boots, pearl handled revolvers and he says, "This is going to be my uniform." So he just took charge.*

*Wharton Ramsey. You can imagine if you ate in one of his restaurants, the quality would be high, but the morale would probably be low. Donald Trump is probably a good example of somebody that fits in the category of Shark. Very much in control, seizing control anytime possible. And of all the sharks on the TV show, Shark Tank, Mark Cuban, the owner of the Dallas Mavericks is the first one who will very quickly tell you he's out if he just gets the slightest hint of something that is not going to work.*
*Very few hugs from these four, lots of being critical, but in every case, people who have achieved amazing stuff. Those are sharks.*

**Points to Cover:**

We don't know for certain, but these characters display some of the behaviors of their particular style.

Page 22

# Sharks: *Spiderman*

*Now what we also do in this module as we show a video example of a shark in action. And so in this case we're going to show a video clip of the editor of the newspaper in the movie Spider-Man. So as you watch this clip, pay close attention and see if you can identify these shark characteristics. And afterwards I'll give you the hint on how to do groups.*

*So let's watch it. To listen to the editor. Right away he's taking charge. You can ask the group this, do you suppose the lady that gives you the check has a name? And the answer, of course, yeah. But we're not concerned with that, is the person low in emotion? And even at the end he kind of tells him what's best for him. That is very typical of what you see in sharks.*

**Points to Cover:**

The editor is highly assertive but low in emotion. For example, he doesn't mention the name of the "girl up front."

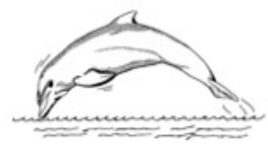
Page 23

## Dolphins

**Quest:** Collaboration

**Style:** Leading the way with willing followers

**Fighting Words:** "It will never work. We've already tried that before"

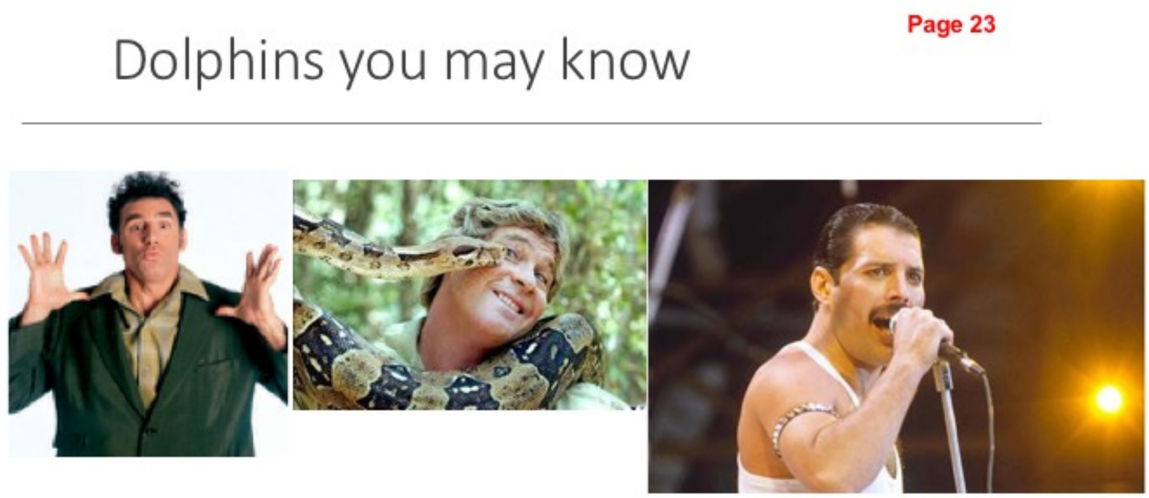


*So that takes us then to the second of our animals. And so this one is the dolphin. Now the dolphin is highly assertive, comfortable telling you what they want, but also very comfortable in sharing emotion. So the quest for the dolphin then is collaboration. Remember for the shark it was control. Dolphins is collaboration. They love to have group activities where they can get together and they can share.*

*The style then is leading the way with willing followers. So remember with the shark, they take charge. People follow either out of fear or because no one else is taking charge, but maybe dolphins are kind of the natural leaders who influence others to follow them. They're fighting words is really anything around negativity. Like when people say, "We've already tried, it's not going to work." That frustrates them because they're all about big ideas and big picture.*

**Points to Cover:**

Dolphins are highly assertive and highly emotional.




*Well, we don't know scientifically or for certain but here's some people that I believe probably give you the characteristics of dolphins. So we have one fictitious there, which is Kramer from the old TV show, Seinfeld. Kramer is always one with big ideas and lots of energy and enthusiasm. Steve Irwin, the crocodile hunter, when he was alive, just made you get caught up in his excitement about some of these very creepy things he would hang on to, and we could put a host of entertainers in there. I chose Freddie Mercury because very flamboyant, way out there and probably the life of the party. So three examples of dolphins.*

**Points to Cover:**

We don’t know for certain, but these characters display some of the behaviors of their particular style.

Page 23

# Dolphins: *McNulty*

*Well, of course we want to show a video clip. So let's go ahead and set the next one out. Now this is a very old clip from a very old TV show, the old black and white TV show, The Twilight Zone. And this is one episode and the main character we're going to look at here is a man named, McNulty. I believe McNulty is a dolphin. As you watched the clip, you'll see his enthusiasm and his excitement and we will revisit McNulty when we start talking about conflict and survival games. That's a little bit later, but for right now, just watch this.*

*Now you can let the group know it's a very old clip. That office environment is very dated, but do not let it be lost on you that this guy is full of enthusiasm. So let's watch. Now what we'll do later on as we talk about conflict is we're going to predict what happens after McNulty is told that he's fired. So that's the second of our animals.*

**Points to Cover:**

McNulty is a great example of the Dolphin.  Full of energy.  See if you can guess what happens after the boss fires him.

Page 24

## Golden Retrievers

**Quest:** Connection

**Style:** Quietly in front of you and facing you

**Fighting Words:** "We don't have time for that touch-feely crap!"

*Third then is golden retriever. Now if we go back to the scale, golden retrievers are low and assertive, but very high in their comfort level and expressing emotion. The quest for them, what drives and motivates them is connection. So with dolphin, of course we saw collaboration, shark was control, connection. And their style is quietly sitting in front of you. Typically most comfortable in one-on-ones.*

*Fighting words for them typically or anything around poking fun at their touchy feely side, their emotional side, especially if it's a guy because men fall in this category too. Well anytime someone says, "Here comes the touchy feely person," well that sets them off, but they don't typically react the way you think they will. We'll discover that when we talk about conflict in just a moment.*

**Points to Cover:**

Golden Retrievers are low assertive but highly expressive of emotion.

Page 24

## Golden retrievers you may know

*Now here are three individuals that I think most likely probably have golden retriever characteristics. The first one was Mr. Rogers and you know with Mr. Rogers, his whole thing was, "Be a good neighbor," and he was just kind of... You felt like you were the only one in the room with him. Pope Francis from what we see is probably one of the Popes most likely to just want to come over to your house on a Sunday afternoon and watch the game and have a beer with you. Just kind of a friendly guy, but maybe more comfortable in small groups.*

*And Bob Ross is the third one there. If you're not familiar with Bob Ross, do some youtube searches on him. He was a painter on PBS years ago and his thing was he would paint and he would talk to his audience and he you just felt like you were right there in the room with him. Very calm demeanor. He'd talk about happy clouds and happy trees. When you talk about him, a lot of your audience are going to remember him right away. Just a very calming presence.*

**Points to Cover:**

We don’t know for certain, but these characters display some of the behaviors of their particular style.

Page 24

## Golden Retrievers: *Gran Torino*

*Well, of course we have a video clip for this one and in this clip, I want you to wash the priest in this movie, Gran Torino. Now what he's attempting to do in this video clip is have a heart to heart conversation with Walt Kowalski, played by Clint Eastwood, a very grizzled robot, Korean War veteran with a lot of baggage. Watch his demeanor, watch how he handles the aggression. You'll see some very strong characteristics of golden retriever.*

*Think about the way his calm demeanor and his persistence, his comfort level in sharing emotion, but not real assertiveness showed through in this clip.*

**Points to Cover:**

The priest in this clip is very patient and a good listener, particularly when Walt insults him.

Page 25

## Spiders

**Quest:** Competence

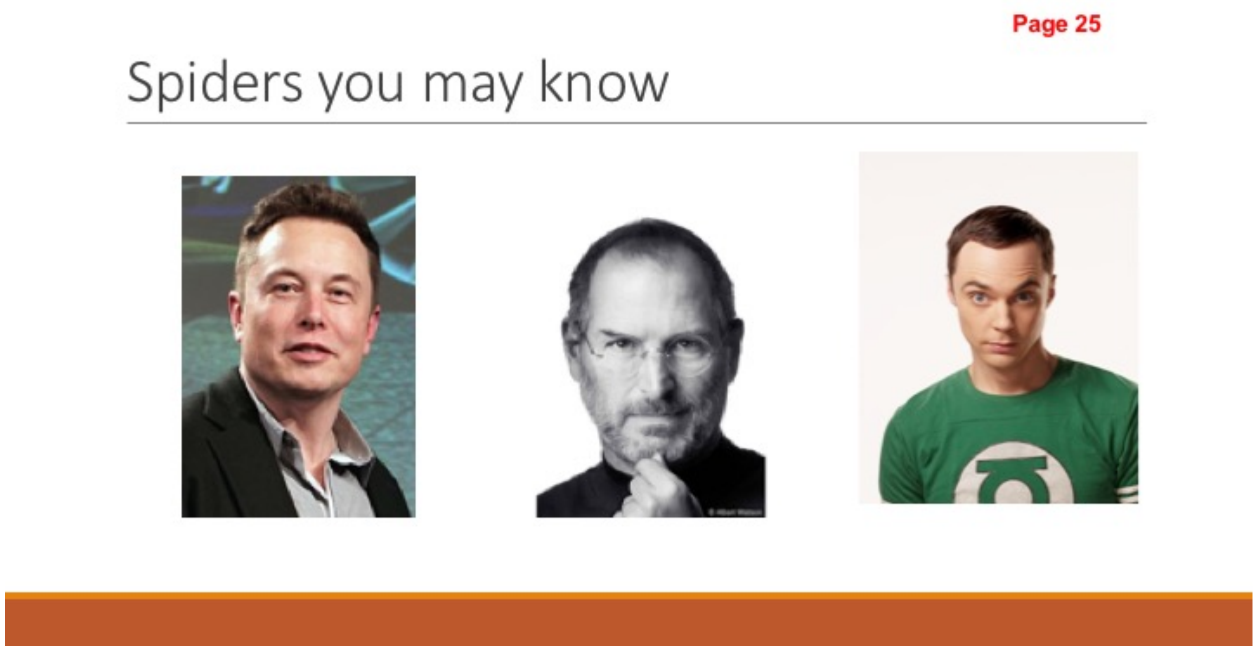
**Style:** In the lab, focused and immersed in a tough challenge

**Fighting Words:** “Are you sure about that?”

*Well that leaves us with just one style. And so our final style is spider. The spider position is low assertive, low emotion. Quest for them is competence. What this means is they are very, very motivated by situations in which they can be the smartest one in the room where people will give them the hardest projects because they know they can handle it and which kind of goes to their style, they're comfortable when they can be locked away with the door shut and nobody bothers them.*

*Their tough challenge is probably something that you could never handle, but your toughest challenge is probably easy for this fighter. Now fighting words for them, man, they're so subtle. But I promise if you say it, you won't even know you did it and you're just going to see them completely shutdown. And that is the simple phrase or question of, "Are you sure about that?" A spider will not even give you a result until they've tried it a thousand times. They test and test and tests sometimes to a fault.*
*So when you get the result and they explain it and you say, "Hmm, are you sure?" I mean they are going to shut you down, so be careful with it. Again, some of these are so subtle, but it's amazing how people would react.*
**Points to Cover:**

Spiders are low assertive and also low in emotion.




*Well, here are some people that we think probably have spider tendencies. We'll start on the left with Elon Musk.*

*Elon Musk at the time of this video is one of the leaders of Tesla, SpaceX, in his spare time he dabbles in things like portable flame throwers and oddball stuff. He's digging a tunnel underneath Los Angeles to have... A hyperloop goes through that. A brilliant guide, not a lot of patience for people who he does not see as up to his level of intellect.*

*Steve Jobs, probably another one in this category. Someone who had brilliant ideas with very little patience and of course a fictitious character there, Sheldon Cooper from the TV show, Big Bang Theory, the central character on this show with a lot of odd ball quirks. Brilliant but yet in some ways not real comfortable expressing emotion.*

**Points to Cover:**

We don't know for certain, but these characters display some of the behaviors of their particular style.

Page 25

# Spiders: *Tony Stark*

*Well, we'll go ahead and take a look at a video clip of a spider in action. And so this put this from the movie Iron Man and Tony Stark, who is the Iron Man underneath a suit, you'll see him early in the movie and watch for the characteristics: highly technical, not super comfortable with emotion. Let's watch.*
*He is with Pepper in her birthday. It's an emotional thing that he kind of discounts and then his thing is, "Did you buy something nice for yourself?" So again, not super comfortable with the emotion, but highly intellectual.*
**Points to Cover:**

Tony Stark is highly technical but fails to remember emotional things like his assistant's birthday.

Page 26 - 27

# My Style in Action

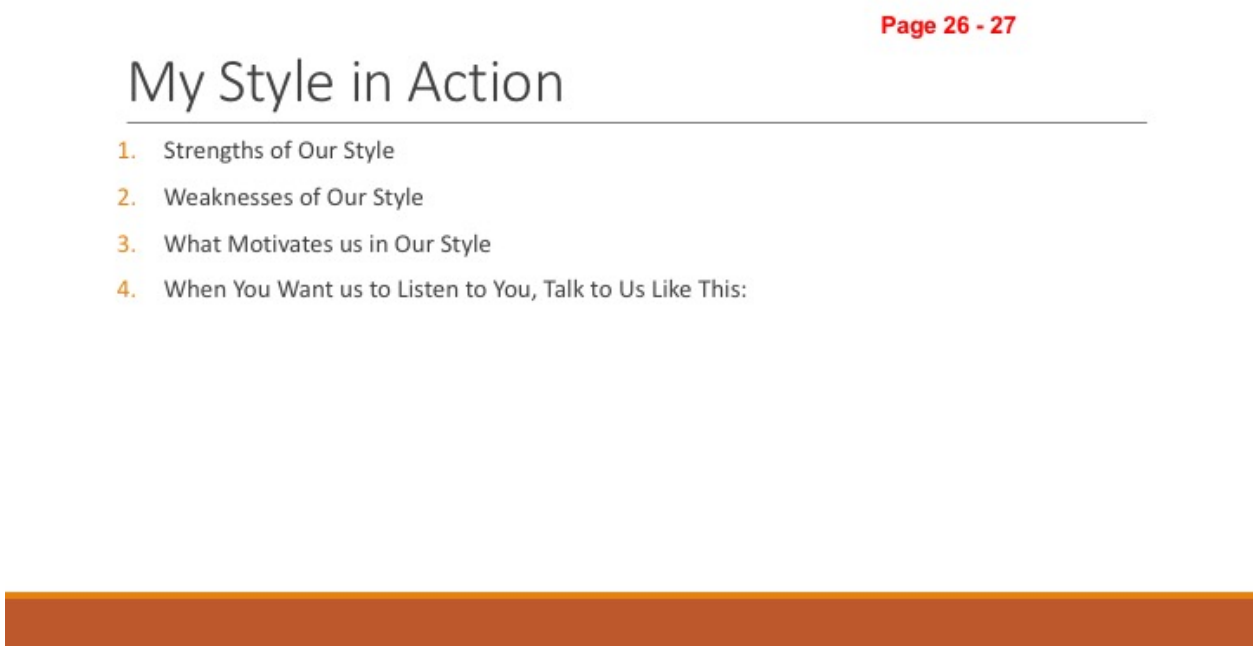
ACTIVITY #4

*Those are four styles of behavior. What might be good to do now is to actually ask the group, "How many of you identify as sharks?" And see the hands and then dolphins and then golden retrievers and then spiders.*

*And then what you can do if you want, you could do it and as you can hand out their results and just give them a moment to check out the results. Once we've processed that, what we wanted to do is when I take this a step further and start talking about the conflict, and so in the next segment, what we'll do then is we'll address the idea of conflict and how people handle it.*
*But one thing you could do now if you want, and you can do it now or you could do it after the conflict piece, is this activity, it's called my style and action.*

**Points to Cover:**

Now that you've gone through all four styles, ask the group to identify which of the four they most closely relate to. Then hand out all of their results. This leads to the group activity in the next slide.




*So what you can do if you've handed out the results, say, "Okay, I'd like all my spiders to go to one section, my sharks, my dolphins, my golden retrievers," and let them know, "I'm going to give you about 10 minutes and we're going to do an activity together."*

*The activity is to answer these questions together in a group, and you'll find that this is a lot of fun because they're in groups of people that they feel comfortable with. And so have them just identify. There's a little bit of material in the workbook, but let them just talk it through. So again, the strengths of my style, weaknesses, what motivates us. So beyond just what those drivers are that we talked about, ask them.*

*And then the last one, and you can frame it this way, the last one, number four is a gift for all of us. When you want us to listen to you, talk to us in this method, and what's so amazing with this is it the method that works for one is the absolute opposite for another, and what we are trying to do is to build the point in here is that we need to stretch ourselves to relate to others versus having others adapt to make us happy. This is what good bosses do. So let this run for about 10 minutes. They can use a flip chart if you want and then have them debrief just group by group and then ask if anybody has questions.*

*Most people really get into this and that then should set you up if it's ready for a break, in which case we're going to shift gears then and we'll talk about the styles and conflict. We will do that in the next video.*

**Points to Cover:**

The video covers this activity, but be sure to highlight that we're all being given a gift to be show how each style prefers to be communicated with.

Page 28

# Conflict: What Would You Do?

*Well, let's take a look at the third section of our gigantic module, which is module two, Building Relationships for Results. When we ended the last one, we had the activity where the groups got together in their animal style and answered a few questions. That's typically a good time for a break. So maybe before the break what you could do is you could begin by opening this part of the module up by talking about conflict.*

*And the way that I like to do that is to show this clip from the TV show Seinfeld. As you set this up for the group, tell them to watch the clip, put yourself in Jerry Seinfeld's position and ask yourself, "How would you handle this conflict? What would you do?" Let's watch.*

*... I usually end this video is to ask, "How many people in the group would actually handle it like Jerry?" A bit of sarcasm, and a few hands go up. "How many of you would want to reach across the counter and grab that clerk by the lapels?" And there's usually one or two. And then I'll say, "How many of you would just simply walk away and find another rental car?" And most people say that.*

*The point we're trying to make here is that when it comes to a conflict, people will make choices. And some of the choices come naturally, others are conscious choices. And we want to talk about what each of those four styles do when a conflict comes, that's going to be very important, because remember, this whole module sets you up as the boss to have better conversations around performance. Those are the things we talk about in module three.*

**Points to Cover:**

In this clip from Seinfeld, Jerry and the rental car agent are in a conflict over expectation. Ask the audience after the clip is shown how they would have handled it. This leads into the discussion over conflict.

Page 28

## Definitions

**Conflict:** When what I **want** is NOT what I'm currently **experiencing**.

**Respect:** I feel like people are **taking** me **seriously**.

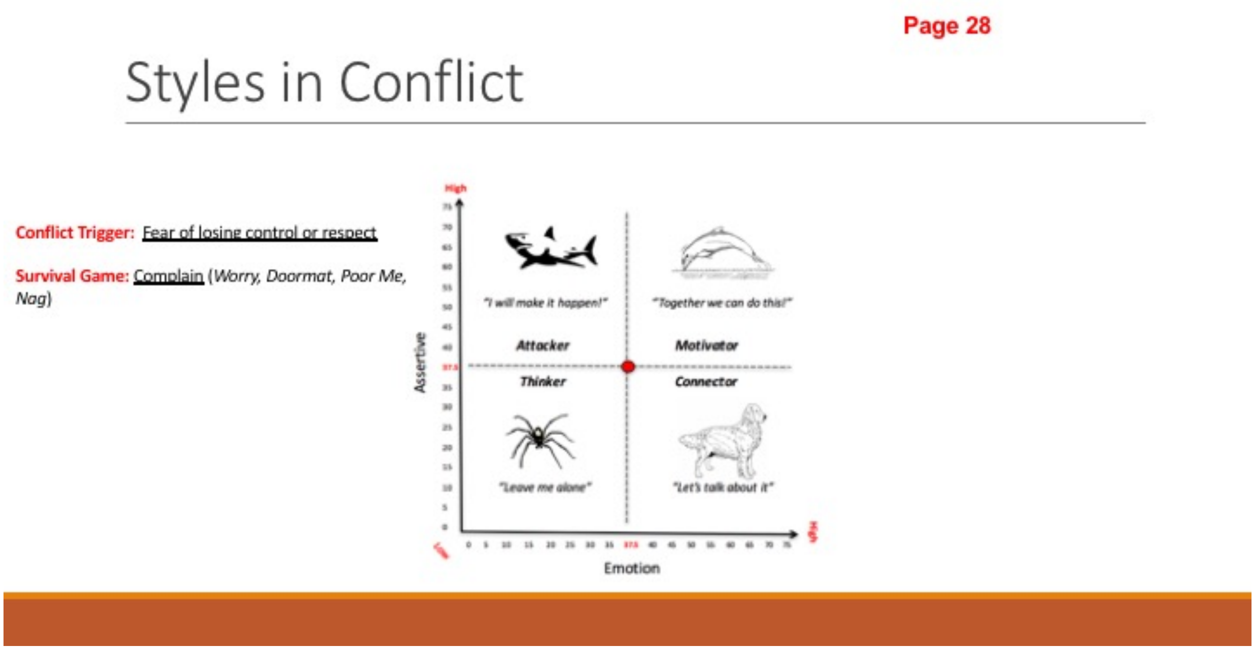
*Now it's important that we start with definitions. And so the definitions, these are in the book too, and they're designed to be filling in the blank there, is we want to define conflict and we also want to define respect, because those two tend to be interchangeable in some cases and one really draws the other, especially in the context we use.*

*Well, we define conflict as when what I want is not what I'm currently experiencing. And so in the case of Jerry Seinfeld, he wanted a rental car, what he was not getting was a rental car. And then there's a second piece of that, that sometimes really leads into the first, and that's respect. And so we define respect as I feel like people are taking me seriously. I think Jerry felt a sense of disrespect, that clerk was not taking him seriously. Conversely, I think she believed he, the customer, was not taking her rules and her procedures seriously, which leads to that conflict. What I want is not what I'm experiencing.*

*And what's interesting is based on what we know that these different behavioral styles have a conflict trigger and then they have, what we refer to as, a survival game. Now this is really important to stress with a group, that if you see people behaving in a certain way, that could be an indicator they feel disrespected or they feel like what they want is not what they're experiencing and they're giving you what we call the survival game. So we want to talk about what sets the trigger, and they can write this in as you pop the slide up, and then the survival game. Then for each of these we have another video clip that will show you that style when it happens to be in a conflict.*

**Points to Cover:**

These two definitions are key to this part of the module. Conflict often is a result of somebody feeling disrespected.




*So the first one we start with, of course, is the shark. And so the conflict trigger is any time a shark feels like they are losing control of a situation or the people are not respecting them anymore. The survival game they will see then is, kind of like the top categories, what we call complain. And there's some variations. The first one is worry, then doormat, then poor me and then nag. It could go in that sequence or maybe one will pop up.*

*So in an example, somebody who feels like they're no longer being respected will complain. And the complains may be about all sorts of different things, but there's variations of it, right? So worry, okay now this is being pessimistic, worst case scenarios are going to pop up. Doormat, well whatever, fine, you know what, I'm the hardest worker on the team so just walk all over me. Poor me then is a quick variation from that, and no one cares about me, I'm the only one working hard. And the last one is nag, and it's pointing fingers at you, almost a blame game. You're the reason why I'm feeling so miserable.*
*Well, I would encourage you as the facilitator, think about your own examples, think about situations you've been in, because what makes these come to life is stories. But to help you with that we do have video clips for each one, and so the survival game we're going to look at is actually a segment from the movie Lean On Me, with Morgan Freeman*
**Points to Cover:**

These slides show each style's conflict trigger and the Survival Game (what happens when this style feels disrespected and in conflict)

Page 28

# Shark Survival Game: *Joe Clark*

*Now in this movie, I'll set the scene up for you, Morgan Freeman eventually is the principal of this school, that he's sent in there to clean house, because it's a mess. And he's a tough guy, definitely a shark. Well, we want to revisit early in his career, this is the beginning of the movie where he's a teacher back in the 60s. You will see shark like behavior as he gets his class together, but then he is informed by one of his coworkers that there are members of the union executive board and they are about ready to be booted out. And this is going to bring about the survival game of complain. So watch what happens, and then I'll debrief it with the specific pieces of survival game I think we see. Let's watch.*

*Do you see he complain, right? He's upset, and I think you see a lot of the poor me and you see a lot of the worry. And again, somebody who's very strong in personality, suddenly feels like he's being disrespected, you see that survival game come out. That's our first of four.*

**Points to Cover:**

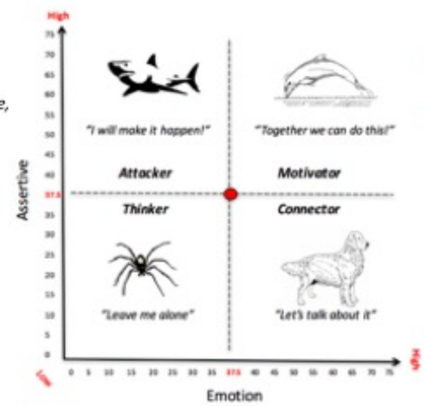
Joe Clark is showing the Complain Game of Poor Me.

**Page 28**

# Styles in Conflict

**Conflict Trigger:** Fear of losing control or respect

**Survival Game:** Complain (*Worry, Doormat, Poor Me, Nag*)




**Conflict Trigger:** Fear of not being free, graceful, and impressive

**Survival Game:** Blackmail (*Con Artist, Outrage, Empty*)

*Now, let's take a look at dolphins. All right? So the conflict trigger for a dolphin is anytime they don't feel like they can be graceful, and free, and amazing and impressive, right? That's kind of like what gets people to follow them. So when someone tries to put them in a box, this is when you get the survival game. And so the main category's what we call blackmail. Sounds awful and evil, and it's not in this context, but there's three. The first one is what we call con artist, and then there is outrage and then there is empty.*

*Con artist is the one that I think your audience will relate to the most. So ask them, "How many of you have couple friends on social media?" And a lot of hands will go up. And say, "All right, how many of you know in some cases these couples don't get along, but how do they carry themselves on their Facebook or Instagram?" And everybody will say, "Oh, yeah. They say my hubby's so amazing." And you're, "Baloney, I know better." That's con artist, it is overcompensating for the fact that you're not as impressive as you pretend to be. That's the most common one.*

*And then there's outrage. Outrage is when they suddenly just go off the rails and just yell and scream and then they say, "See what you made me do? You made me do this." Third one is empty. And most of the men in your audience will relate to this if they have a partner who is a female. It goes like this, "Hey, are you okay?" "Mm-hmm (affirmative)." "Are you sure, you seem mad?" "No, I'm fine. It's all good." That's empty. That means I've been really wounded and I'm not about to tell you, but inside things are not going well.*

**Points to Cover:**

These slides show each style's conflict trigger and the Survival Game (what happens when this style feels disrespected and in conflict)

Page 28

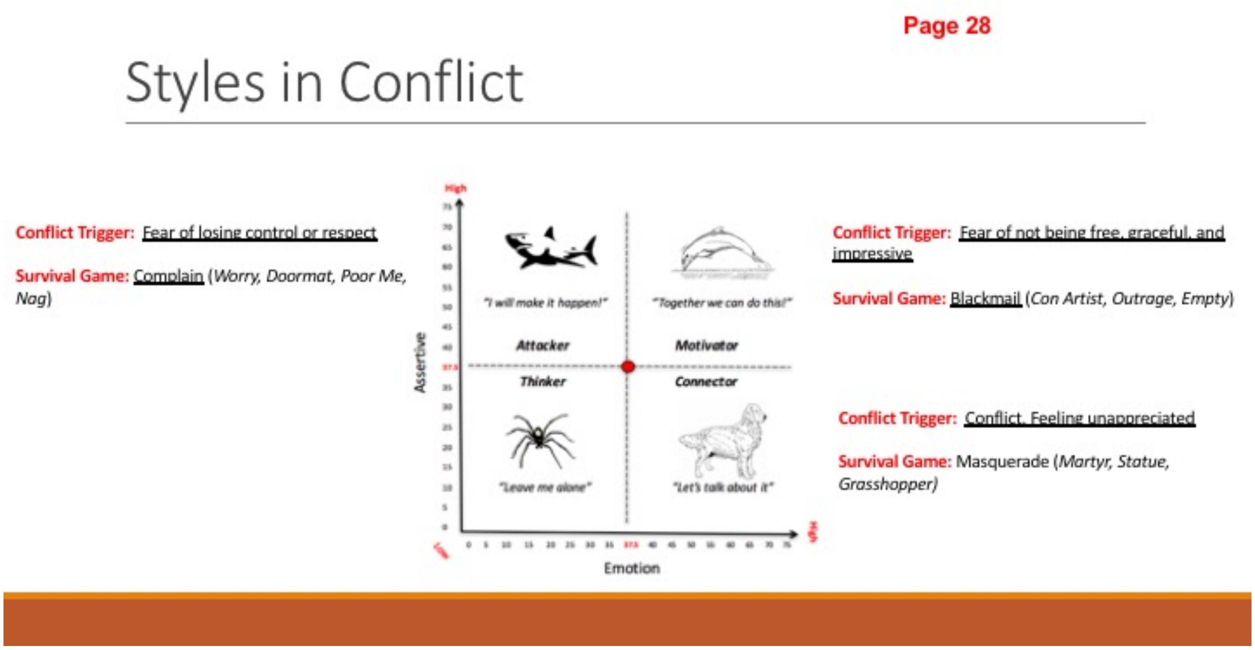
# Dolphin Survival Game: *McNulty*

*Well, we have a video clip that we'll look at for this one. And we're going to revisit McNulty, which we saw earlier. So this is a very short segment, remember his boss fires him. So now, McNulty, he's kind of the big flamboyant guy, he's at a bar. Listen to the conversation he has with the bartender, and you tell me what you think the survival game is. Let's watch.*

*It is con artist, isn't it, right? He doesn't come out and flat out say I screwed up and was fired, it's always some big story. And eventually he's kind of pinned in the corner and he admits it. This is what you often see, and it's sad to see, but if you understand it you'll understand why a person does this. Now, just keep this in mind, if you are training managers in these courses, these are going to be the things they experience when they have to give negative feedback to somebody who works for them. So, stress the fact they got to learn how to spot it and learn how to get around it, and you'll see how to do that in a moment.*

**Points to Cover:**

McNulty is showing the Survival Game of Con Artist.




*Well, we're onto the golden retrievers now. So the conflict driver for them is anytime that they feel like they're not being appreciated, or if there's a just the whole workplace has a lot of conflict, they'll go into what we call masquerade. Masquerade, there's some variants of that. One is what we call the martyr. And martyr just takes one for the team, right? Whatever, just I got it, just lay it all on me. And then statue. Statue is a little bit like what we saw earlier with empty, lack of emotion. But the third one is the one that's the most fun, and that's grasshopper. And so what happens, and your bosses, your managers will find this, when they have a golden retriever and they got to get after them for performance, watch how fast, when it's uncomfortable, they try to change the subject.*

**Points to Cover:**

These slides show each style's conflict trigger and the Survival Game (what happens when this style feels disrespected and in conflict)

# Golden Retriever Survival Game: *Rocky II*

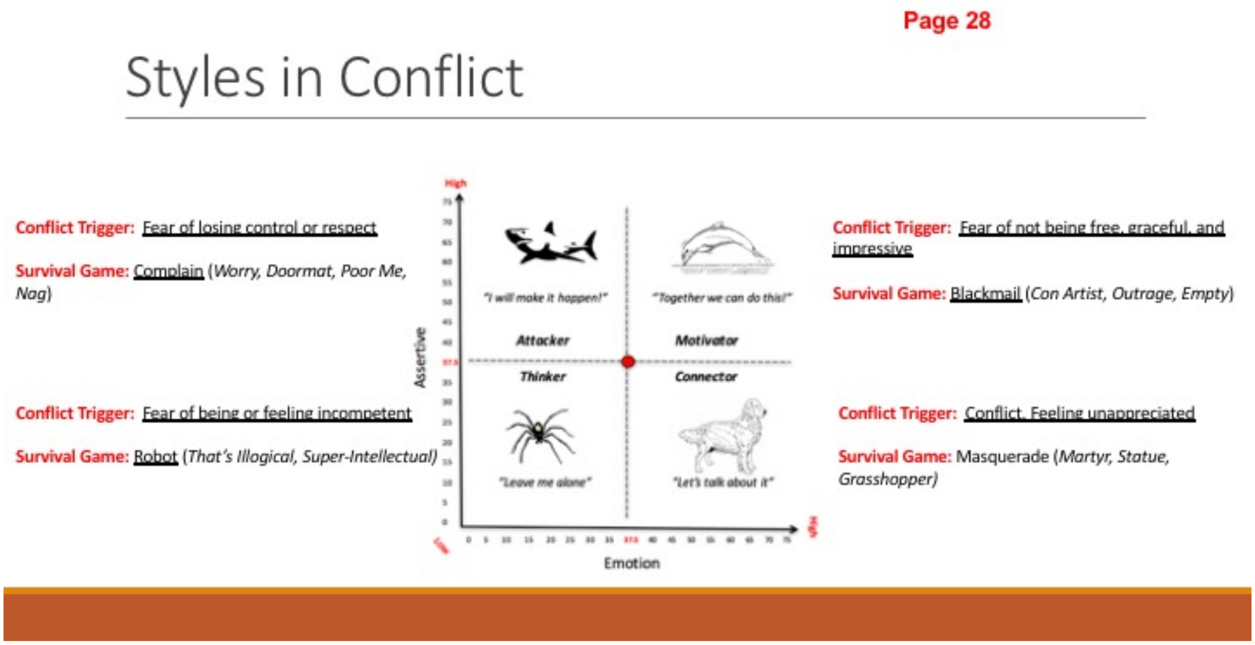
Page 28

*That's something that you'll see in the video clip that we'll use for this one. And so I'll tell you ahead of time, watch for grasshopper. This is a scene from the movie Rocky II. Now I believe Rocky Balboa, down deep inside's a golden retriever. In the first film he fights Apollo Creed, he loses. In the second film a lot of the audience thinks that Apollo Creed threw the fight, so Apollo's mad, he wants a rematch. Rocky's not really into it, and reluctantly agrees. So the scene we're going to see is actually from the press conference. Watch Apollo, who I believe is a shark, and watch him try to goad Rocky into a conflict. Remember, golden retrievers aren't into conflict, and watch Rocky. See if you can spot grasshopper.*

*Every time he is cornered he comes up and tries to sort of change the subject or change the tone, change the context. And so Apollo of course, feel he's disrespected as a shark, at the end he goes in complain mode. So you can see the different styles all play out.*

**Points to Cover:**

Rocky is showing the Survival Game of Grasshopper, uncomfortable by Apollo Creed trying to goad him into a conflict.




*Well, that leaves us with just one, and that's our spider. So the trigger for the spider, because we know they're big into competence, is anytime they feel like they're incompetent or people are treating them like they're incompetent, survival game for them is what we call robot. And robot has two variations, the first one is, that's illogical, and the second is super intellectual or hyper intellectual.*

*So, that's illogical goes a little like this. Let's say that you are a spider and I'm your boss, and I say, "Hey, Joe, whatever your name is, I'm looking at these results you gave me and my gut tells me these aren't right." And so the robot, who's hyper intellectual, is going to say, "What do you mean they're not right? How do you know? Tell me your guy, how do you quantify that?" So word of wisdom here, you're going to go and confront a spider about their performance you better have your numbers, because that's what they want. That's the first part, that's illogical. Super intellectual is when their responses go over the top technical, almost that they're overcompensating for the fact that they don't know what they're doing, and yet they'll never admit it to you.*

**Points to Cover:**

These slides show each style's conflict trigger and the Survival Game (what happens when this style feels disrespected and in conflict)

Page 28

# Spider Survival Game: *Big Bang Theory*

*Let's see if we can spot that in this clip from The Big Bang Theory. Now, I believe in this we're going to watch Dennis Kim, he's the one to pay attention to. Sheldon, I believe, is also a spider, we talked about him earlier. So we're going to see are a couple of dynamics. Number one, watch Dennis Kim, watch and see if you can spot his survival game. And then also ask yourself at the end, "What is causing Sheldon to be so worked up over this 15 year old kid?" Let's watch.*

*Dennis Kim, I think it's pretty obvious that he is doing super intellectual, right? So he is coming into a group of three PhDs, right? And he only has a Master's degree now, he is suddenly intimidated. So what does he do? He insults Sheldon's work, and the school's resources and goes into hyper intellectual mode. And in the end he realizes he's probably in over his head, so he gets distracted by the chocolate milk. Sheldon on the other hand, sees a threat. Again, we're going back to just the raw emotion of the spider when there's competition. Somebody might be smarter than me, causes a great deal of chaos.*

**Points to Cover:**

Dennis Kim, intimidated by 3 PhDs is showing the Survival Game of Hyper-Intellectual.

Page 29

## 7 Rules When Viewing Behavior Style

1. Don't stereotype!
2. Your strength maximized becomes a weakness.
3. Your Style is only an explanation; never an excuse. Don't blame everything on your opposite Style.
5. Style is only one lens through which to view human personality.
6. To be effective, you must begin with yourself before you can apply it to others.
7. Style awareness alone can't solve everything.

52

*So, those are your four styles there. That leads us to this piece here. And it's very important that you stress, because what you'll find, especially if your group is really into this, is they're going to all of a sudden they want to use this, they're going to want to put it on their badge or on their cubicle. Just some things to work them through. And number one, don't stereotype. So I mean, we do lead you down this path to look for signs and symptoms, but be careful not to generalize. And then every one of these styles has a strength, but your strength maximized can be your weakness.*

*So somebody, for example, let's go back to spider. You maximize that, people are going to feel intimidated around you and they're not going to want to even open up with new ideas. Your style is an explanation, not an excuse. And so I had done a workshop with a group years ago and many of them identified as sharks. Well, I came back a few months later and their HR person was concerned, he's, "These people are walking around saying, hey I'm a shark, so just get over it. This is the way I am." All right? Don't blame everything on that style, it's important that you take ownership for it.*

*This is only one lens. Many of the programs we use at Boss Builders use Myers-Briggs, and some use DISC, this is one. There's a lot of other ones, this isn't the end all be all. Also, you will find people say, "Hey, is there anyway I can get my partner to take this or my kid or whatever?" Fine, if you need that resource, contact us and we can show you how to do that, but let them know. Don't start trying to diagnose the world, start with you first and then worry about other people.*

*And finally, style awareness alone can't solve everything. That's huge, because you're going to find this in the next module, right? It's all about performance conversations. Just these behavior quirks are not nearly enough. They are a foundation and a start.*

*Well, that takes us to the fourth and final segment of this, and that is, how do we reach agreement? How do we keep our cool when we're stressed? And then how do we have the conversation with another human being to be able to speak from the heart about why I am not feeling respected right now? That will take us to the end* *of this module, and then we'll turn our attention to the meat of the course, which is driving results. We'll get to that after this break.*

**Points to Cover:**

The video describes each point. Let the audience know this is a rapport-builder and that many more tools and skills are needed to be effective as The Boss.

Page 30

# Going Shark: *Fried Green Tomatoes*

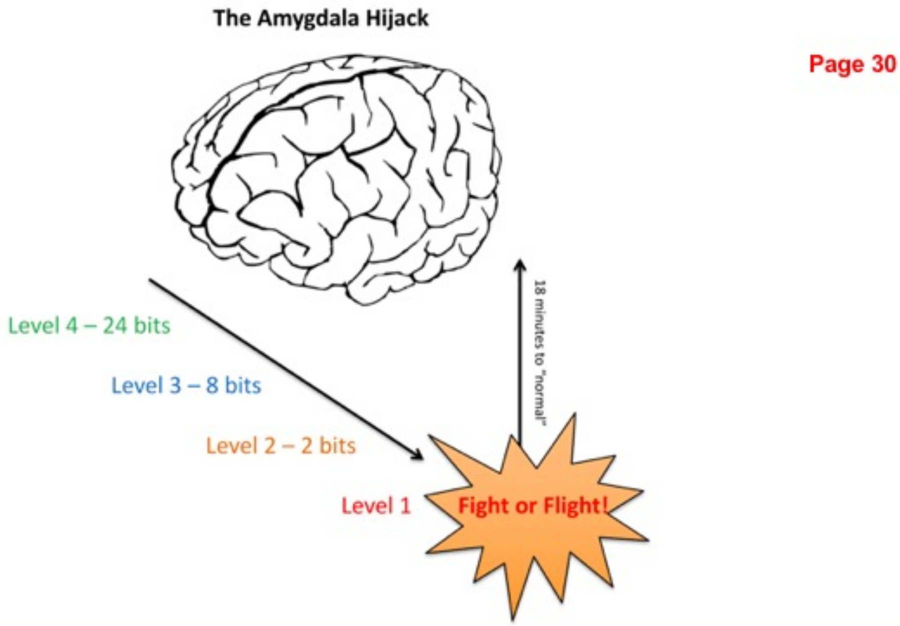
*Well welcome to the fourth and final section of module two, building relationships for results. Up to this point, we've talked about basics of communication. Then we talked about the individual styles. Then we shifted gears on the styles and we talked a little bit about how they deal with conflict. Well the last segment of this is putting that into action.*

*So what we do is we start off this segment with a video clip from the movie Fried Green Tomatoes. Now the point of this is, is we've got to figure out why everyone of those core styles is pushed hard enough, it can actually go shark. So let's watch this video and then I'll explain how to debrief it. Here we go.*

**Points to Cover:**

The video shows what happens when emotions take control.  In the video clip, Kathy Bates goes from Dolphin to Shark in a matter of moments when insulted by the two young girls.

Ask the audience after the clip is shown, what they think would happen after she leaves the parking lot. (she would realize what she did was wrong).  That is explained in the next model on the next slide.




*Understanding this video is to understanding the concept of what we refer to in this program as the amygdala hijack. Now the way this works, and this is based on people that study emotional intelligence, is that the human body is really just run by the human brain, and the human brain makes decisions. Well the way that it works is that when we're in our perfect place, the brain is able to process 24 bits of information every 8.5 milliseconds. Now that is seen on this model here at level four. Now that's when you're operating at full capacity. The human body also has a mechanism to detect danger, and that is a little gland that sits on the base of the brain. It's known as the amygdala. The purpose of the amygdala is to sense any kind of a threat, and when it does, it begins to secrete a hormone into the brain known as cortisol. It's the stress hormone.*

*So let's go back to the video. Kathy Bates is in the car. She's feeling pretty good. She's at level four. That old man backs out. Those two young girls swing their Volkswagen in there, and immediately she realizes there's some sort of a threat. She's probably at level three. Now at level three, the brain is only processing eight bits of information, and that's because the cortisol is beginning to get into those areas to slow the thinking down, or rather speed the thinking up. You don't want to overthink things. When the girls insult her, then she hits level two. Level two now, you're only processing two bits. The brain is starting to become hijacked by that amygdala. And at level one, and you saw Kathy Bates go into this. Remember her hands started to grip the steering wheel. She started to breathe a little heavier. She got that really creepy smile, and then she finally got the serious face.*

*And then of course she rammed her car into those girls' Volkswagen. That's level one. That's fight or flight. She's running into it. It seems like everything is perfect and normal. And then when those girls come out, she has such a calm voice. "Face it girls. I'm older and I have more insurance." At that point, if we were to follow what happens next, she would go to the end of the parking lot, turn right, and immediately she would say, "Oh my god. What did I just do?" Because see, once you hit this fight or flight mechanism, the process goes in reverse. What happens then is as the cortisol leaves your brain, the brain starts to think again and it realizes, "Wow you made a pretty bad decision back there." The scary part is that it can take up to 18 minutes to get* *back to normal, and you might be halfway there and another trigger hits, and then you're going to go back down.*

*So, we call this going shark on somebody, or you could use the word amygdala hijack. What we're trying to do here is to show the participants that any type of a stress can cause them to go outside of their comfort level, especially if they are in survival game mode. This is what you might see. Now this is something that we really have to keep under control. So a couple points you can make are this. First of all, you can identify your trigger points and start to mentally process those. For example, if Kathy Bates knows every time she goes in the parking lot she's likely going to want to run somebody over, it might be good for her to say, "Let me park at the very back of the lot, or maybe let me take an Uber when I go shopping." Understand what your trigger points are and then avoid them. This goes back to that emotional intelligence fan that we saw earlier in this module. You know yourself and you control yourself. So that's the first strategy.*

*Now the second thing is realize that you also have the ability to control the amygdala hijack of others, which means when people are getting stressed out and wound up, you can control yours, and if they see that, it might bring them down. Think about flight attendants on a very turbulent flight. They have a very calm facial demeanor, and most of the time if you're a novice flyer you look at that and say, "I guess it's going to be okay." So this is what we want to stress in this particular module, at the end of this module and with this slide.*

**Points to Cover:**

The video describes this but the key to not going Shark on somebody is to realize trigger points. This goes back to the emotional intelligence model (Know yourself, control yourself). Remind the audience that we can control the amygdala hijack in others by remaining calm in a crisis.

Page 31

# Reach Agreement

ACTIVITY #5

*Now the next thing we also want to work on is how do we work better to reach agreement. So this takes us up to our next activity. This is activity number five. So what I've done on the slide here is I've put these three colored cards. You will be receiving these in your kit when you get it. The front side of this has just a logo on it. The back side has what you see here. There's three different scenarios, and in all three scenarios, these people all want the same things. So to set this activity up, you will start with the following statements. You have a very important project that requires you to have an entire box of oranges. You go to the store the night before the project has to start. You go into the produce section and you see there is one last box of oranges left. As you reach for the box, two other people reach for the same box. What you have is now 10 minutes to work together to reach agreement.*

*So what you'll do at this point now is you will hand a card to every person and have them work in groups of three. They're not supposed to look at each other's card, so let them know, hey just pay attention to yours. I'm going to give you a few minutes to read your position, and then I'm going to give you 10 minutes to see if you can reach an agreement, but remember no matter what, you need to have that entire box of oranges. Now if you take some time to read the scenarios, you realize that all three things are important. And the motto on each card, now they don't know what the other cards say, is it's all about the kids. So what we're trying to do is create a sense or urgency, create a sense of I need all of this, I've got to have it. The kids are most important.*

*In all three scenarios, all benefit kids. And yet when you get them together and have them start debating, you're going to find some of them reached agreement almost instantly. Others probably won't the entire time. This is designed to get people to fight to have that entire box of oranges. That the way that it shapes out, and like I said, in some groups that happens right away, it's that one person needs to have just the seeds, one needs the juice, and one needs the rind. And once they start by asking questions like, "What part of the orange do you have to have," they start to communicate, and before you know it they reach agreement.*

*So after 10 minutes are up ... So you'll say, "I'll give you 10 minutes to reach agreement. If you have reached agreement, just give me your hand, let me know, and then sit quietly." So let them go. Sometimes they all get* *done early. Again, there's always that one group. So when they're over with, ask them, "How many of you are still working on this?" Some of the groups put up their hands. Say, "All right. Where are you stuck?" And they'll say, "This is most important. We need it for ours." You'll have other people that say, "We've reached an agreement. We've agreed that I'm going to just split it all up, and one person's going to get more than the other." And that's okay, but what we're really looking for here is the idea that everybody can have everything they need if they simply get past the whole notion of what they want.*

**Points to Cover:**

The video describes this activity.  Be sure to set up the scene as described in the video to get the maximum amount of discussion around each scenario.  The key is to get the group to ask the question: Which part of the orange do you need?

## Pat Smith

**You're organizing a huge fundraiser for the Make-A- Wish Foundation and really want the entire box of oranges to produce enough cakes for the event. These cakes will be auctioned off and are expected to fetch ten times the cost of the ingredients, all the proceeds of which will be donated to this important charity. Your recipe calls for grating the orange peel and using the curled peels to decorate the cakes. It's this added touch that will fetch the highest bid.**

**You're concerned that if doesn't happen, the fundraiser will be denying the "bucket list" of some seriously ill children.**

**Your motto is: "It's all about the kids."**

## Dana Jones

**You're a teacher in an inner city school and are doing a project where at-risk students are practicing sustainability by converting empty lots into viable, food producing gardens and groves. Since citrus is key to health, orange trees are a good start. You want the whole box as you have many students.**

**In this project, students will receive one orange each and extract the seeds. Those seeds will be planted and the resulting tree will be named after the student. This will provide a legacy for that student, teach them to importance of sustainability, and improve the community.**

**You're concerned that if you don't get the oranges, this project will derail. The planting season is short and school is out for the summer in just two weeks. Who knows how many of them will return to school in the Fall...**

**Your motto is: "It's all about the kids."**

## Corey Roberts

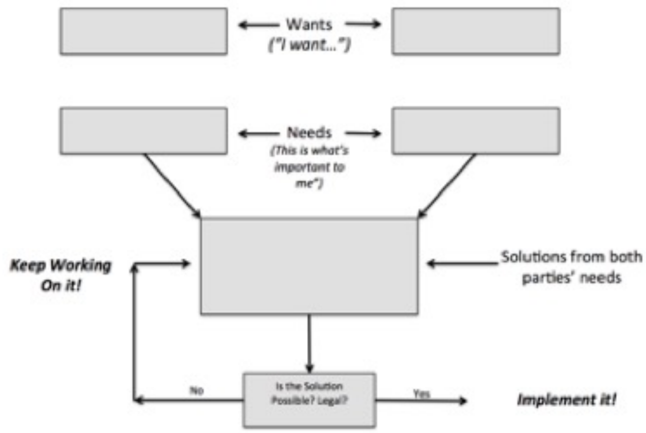
**You're a medical doctor doing a residency in the pediatric cancer ward of the local hospital. You are doing research comparing the vitamin C in oranges to vitamin C tablets and want to have the entire box of or-anges in your control group for a cancer study. Because these patients are young, fragile, and in the middle of debilitating chemotherapy treatments, you have to work fast. The window of this study is a small one and needs to be started right away.**

**You're worried that if the patients can't drink the juice of 10 whole fresh pressed oranges this week, you won't be able to track your findings and present them to the Homeopathic Medicine Committee meeting who will fund this project.**

### Your motto is: "It's all about the kids."

Page 32

## *The WhineBuster™*




*So the result, the one of course you want, is that they all get the parts of the oranges they need. Which should lead you then to this next tool. This is a tool that we call the wine buster. The purpose of the wine buster is to help people understand that when everybody has got to have something, you've got to understand the difference between want and needs. So in our case, we had the scenario, the three people wanted the entire box of oranges. But once you start asking questions, good questions, and we're going to go over lots of questions in module three. But what part of the orange is most important to you? That is a need. If we can separate want from need, there's a very good chance we can reach agreement.*

*So when we started to unpack this, one person needed the seeds, one needed the juice, the other needed the rind. We all could get what we need if we simply get over the fact that we have to have it all. Let them know that if you base your conflict or your negotiation on what you want, the person that's going to win is the person with the most power, and that's not always going to work in your favor.*

*Now the third part of the wine buster tool is that part in the middle where it says, "Solutions from both party's needs." If we are going to reach agreement, we have to make agreement on the need, not the want. Then the last section is really important too. Is our agreement going to be legal? Is it something that we're all going to hold firmly to? You could almost set the scene. What you'll get is one person will say, "Well this person's going to take the oranges and split out the juice and seeds. We're going to meet them at their house, and then we'll get our part." And they always say, "Well what if that person decides that they're not going to hold true to their negotiations?" Well the relationship completely falls apart because the trust is broken. So that little part at the end that looks like a little bit of a flowchart there, make sure that whatever you come to agreement on, you are willing to follow through and it's legal and it's possible.*

*This is a really good activity that will really get them talking, and I think that they're going to find that they can apply this in other areas of life as well. Planning a family vacation. Negotiating who's going to do the housework. So there is a lot of really good use for this tool.*

**Points to Cover:**

The model above is a guide to having a productive conversation.  It's important to operate from NEEDS, not WANTS.  Any solution must come from common NEEDS.  Then, before implementing the decision, be sure what you both agree on is legal and permissible.

Page 33

# The Empathy Rubric™

**Step #1:** Identify your emotion

**Step #2:** Identify your self-talk

**Step #3:** Identify your physical response

**Step #4:** Empty your mind

**Step #5:** Attend to the other person

**Step #6:** Ask open-end questions

**Step #7:** Listen actively

**Step #8:** Don't assume, but read between the lines

**Step #9:** Summarize their points

**Step #10:** Ask permission to respond

*Well there's just a couple more pieces of this module. So we start to end the module with this, the empathy rubric. We call this the empathy rubric because it's designed to give you a step-by-step process before you have to handle a really, really tough situation. And the tough situations can be really of any sort, but the ones that we're most concerned with here is when we have to sit down with a direct report and give them feedback on their performance, or conversely, we have to handle a customer complaint. So we start with step number one. So you'll notice here that step one through five, actually one through four, we do this before we even pick up the phone and talk to the person. So step number one is identify your emotion. Are you feeling angry, frustrated, infuriated? Identify that. Write it down if you have to.*

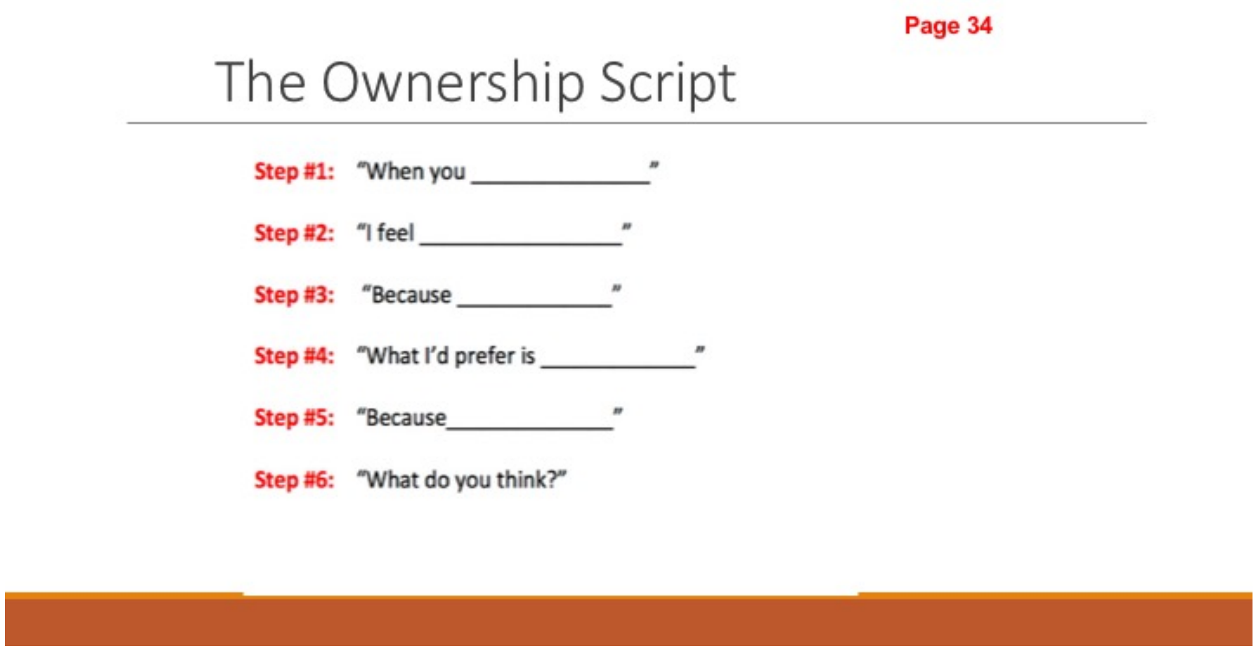
*Step two is identify your self-talk. The self-talk could be things like this. "Every time I call this person, they give me the same stuff," and it's a mental model that you're already predicting will happen. Identify your physical response. So we recommend that you look in a mirror. Look at yourself. If you look mean and frowning, there's a good chance that's going to come through in your voice. An old call center trick is that call center reps are encouraged to talk into a mirror when they're on the phone and smile because the smile comes through in their voice.*

*Step four is to empty your mind. So his goes back to your self-talk. "Every time I work with this person, they give me the same stuff." So empty your mind. We want to start in a sense of curiosity. Remember, we're looking at the stairway to heaven now, not riding the highway to hell. Step number five is attend to the other person. This is where you pick up the phone or you go see them. This is where you want to sit in curiosity. So you're asking open-ended questions. You'll see a lot of these in module three.*

*Listen actively. This is the mirroring and the pace matching that we worked on earlier in this module. Don't assume, but read between the lines. The assumption there is, "This person always says this," or, "They never want to do this." Those are key words, always and never, so read between the lines, but don't assume. Summarize their points. We do that so that we feel like they have been listened to. And then and only then do we ask permission to respond. We ask permission because it gives them a sense of power and they have* *control. And honestly if you have spent the time to really listen, they will be more than willing to listen to what you have to say.*

**Points to Cover:**

These 10 points are designed to have an assertive, productive conversation to handle conflict. Note that Steps 1-4 happen before we even talk to the other person. They must be done in order to be effective.




*There's one final slide and one final script that we teach in this module before it ends, and this is what we call the ownership script. This is designed for those who are in attendance in the workshop to be able to speak assertively when they're being pushed into a corner. As the boss, we don't want you to be a tyrant, but on the other hand, we don't want you to be beat up every time you turn around. So this is your chance to respond primarily if the person you're responding to has more power than you. So the way we do it is we kind of fill in the blanks.*

*This would be me talking to my boss when my boss has repeatedly shut down my ideas in a meeting. So I would say to my boss, "Hey boss, when you shut down my ideas in the meeting, I feel somewhat disrespected because I have contributions and I'm not getting the sense I can contribute. What I'd prefer is that you at least let me talk about my points and give me some examples because ultimately I think you want the best from your team. What do you think?" So what we do here in the script is we simply fill in the blanks. The thing about feeling is important because no matter what you can't argue with how somebody feels.*

*Steps three and step five, the because statement, that's huge. The because qualifies. Now there was an interesting study done a number of years ago, and this group was, they were observing a group of people who are lined up at a copy machine in a busy office waiting to make copies. So when somebody would go to the front and say, "Hey I need to cut in here," of course they were bounced to the back of the line. But then those researchers said, "Listen, when you go up, tell them you've got to make copies. You need to cut in line because you have to make copies," and like 95% of the time they let them in." It sounds really silly and stupid, but the because is the qualifier. So, this is again a script that you would use if it's an uncomfortable situation or you have to talk to somebody who has more organizational power than you do.*

**Points to Cover:**

This model is a guide for a conversation that will be uncomfortable or done with a person who has more power than you. The key word is BECAUSE. This qualifies your request, which often makes the difference.

Page 35

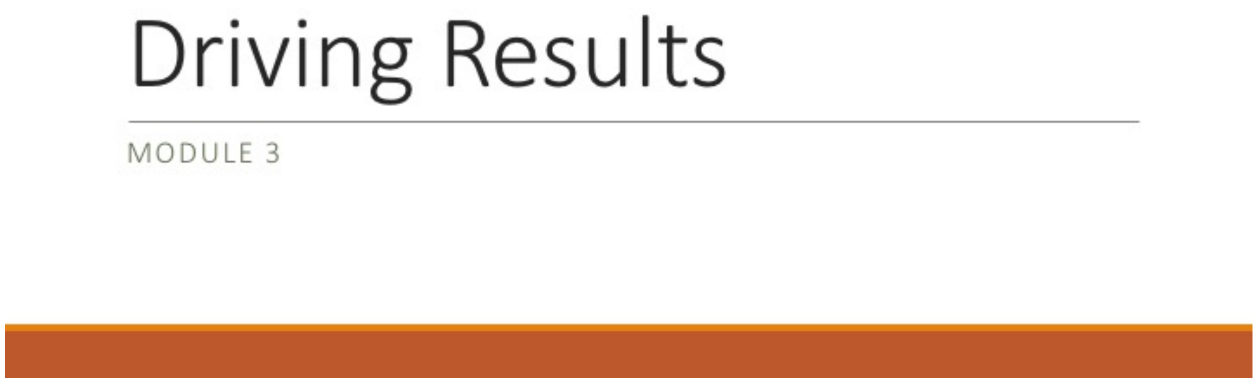
# Module 2: Summary and Commitments


*That takes us to the end of module two. It's a huge module, but it sets the stage for module three, which is even bigger, and it's the foundation of the other modules to come. So just as we did in module one, give them about five to 10 minutes to take some notes. What are some things based on what you learned in module two that you will start doing? What are some things that were validated in module two that you will continue to do? What are some things that now you see you need to change? And number four, what are some things you might be doing now you should stop, for example, running down the highway to hell? So give people time to take those notes. Then what you can do is probably give them a break. When you come back, we start into module three, driving results.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 37

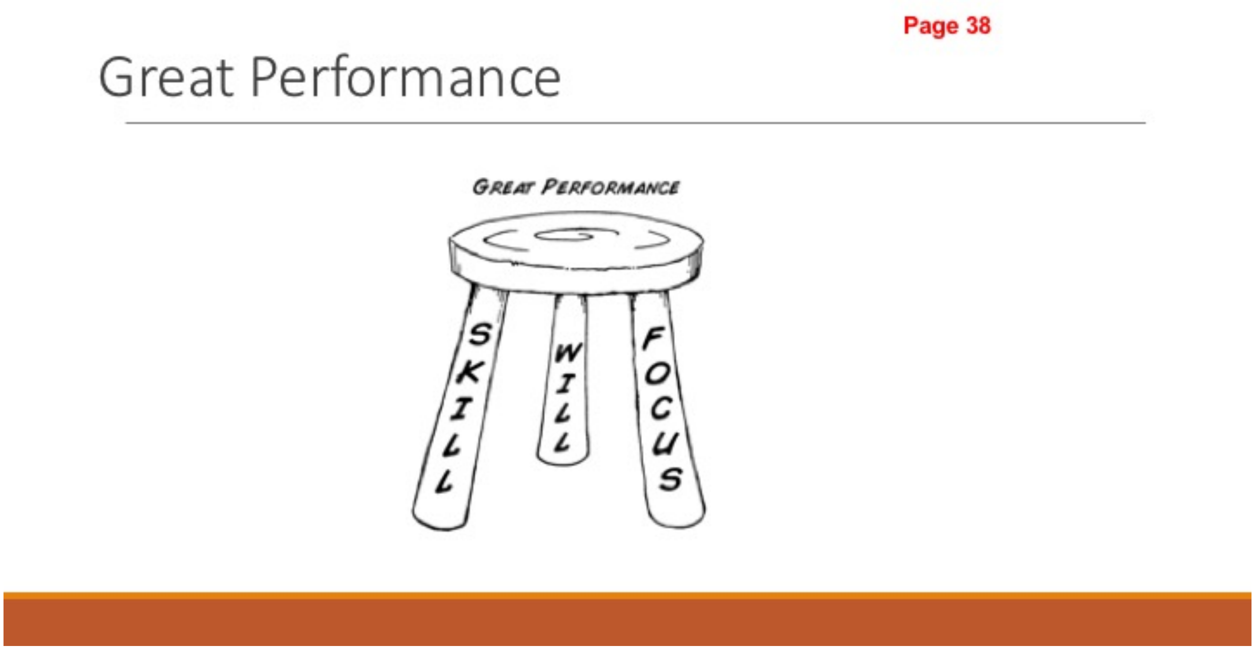



*Welcome to module three. This module is called driving results, which is interesting because the entire program is called driving results, but that should let you know that this is the key module. What you'll be teaching in this module has been set up by what you taught them in modules one and two. Those are the foundation. This is where they can actually start really achieving some great things because this is all about developing people. Let them know that the tools that they will get in this module should result in immediate action, positive action as they try their best to develop great performance in their individual direct reports.*

**Points to Cover:**

This module is the longest module of the program and is probably the most important.  Be sure to let the group know that everything we learned in Module 2 is the foundation for this one.  Rapport is the key to success in developing people.




*Now, the key tool of this module, and you can use this from here on out, is the one that you'll find on the very next slide. Our recommendation of course, is that if you could draw this out on a flip chart or a whiteboard and just draw the stool, don't put the letters or the names inside the legs just yet because that can be how you talk them through how this tool comes together. So the way to set this up is to ask your group, in a three-legged stool model where all three legs are evenly balanced, what happens when you knock one of them out? And of course the response should be, it falls over, and you say exactly. We're going to talk about great performance as a part of three important legs and just like a three-legged stool, if any of the legs are broken, the whole thing will fall apart. So what we do is we begin with evaluating one of our direct report's result, whatever they've accomplished, and if it does not meet our standards, we have questions to ask. And so it's one of our direct reports screw something up, the first question we need to ask is do you even know what you're doing? And if they say no, then we know that we have just identified the problem. It's a problem of skill. So if you're drawing this up, you can write skill where that first leg is.*

*Let them know that if you have a skill deficiency, the way that we would fix that is training. Training can be any sort of training that you want to do, but it should fix a skill. For example a course that would be labeled how to, and then that would fix the skill. This is the easiest problem to fix. It's also the one that most people think fixes everything, but you're going to see very quickly that it only fixes one thing and that is skill. So training doesn't fix everything, just fixes skill.*

**Points to Cover:**

Of all the tools and models in this program, this is the most important. You can diagnose the root cause of any people problem with it. Remind the group that in a 3-legged stool model, if one leg is broken, the entire thing will fall.

When somebody's performance is not up to your standard, ask a series of questions:

1. Do you know what you're doing? (if not, then a skill problem, fixed with training.
2. Do you want to do the job? (refer to the next slide and video clip from *Gladiator.*

Page 38

# Will Problem - *Gladiator*

*Now, the second leg of our three-legged stool becomes an issue when somebody knows what it is they need to do, they just don't feel like doing it. And maybe the best way we can look at that is through this video clip that we're going to see now. This is a video clip from the movie Gladiator.*

*Now, the scene that you're going to be showing them is when Maximus, who was a general in the Roman Army, he's captured down as a slave and they're trying to get him to fight as a gladiator. So watch the clip and the question to ask the group is, why do you suppose Maximus has such a bad attitude? So watch the clip and then I'll go ahead and debrief it for you. Here we go.*

*Question to ask your group is this, do you suppose that Maximus knows how to fight? And those who have seen the movie will say absolutely. And then you know you could ask the group if you haven't seen it, tell the group what happens. And so the question is, why does he not want to fight? And this takes us to the second leg, that's the leg of will. And the way to debrief this is to say, Maximus was a general in the Roman army where fighting was an honorable thing and now he's being asked to do it for sports, not to mention these evil people that killed his family. So he just doesn't have the will to fight, so he throws the sword down. The will is a much harder piece to deal with. In fact, so difficult that we're going to spend an entire module and module four is going to be all about engagement and motivation. And so if you want, you can refer them very quickly to flip forward in their book to page 74. We have a really nice model of motivational drivers. Let them know that we're going to spend a great deal of time on this and so we're not going to spend time on will problems just yet. We'll come back to it, but if you want to see where we're going, go ahead.*

**Points to Cover:**

In this video, Maximus knows how to fight but doesn't have the WILL to do so. Let the group know we will address WILL problems more specifically in Module 4 but that the short answer for now is that WILL problems are fixed through motivation of some sort.

Page 39

# Focus: *The Blind Side*

*Well, that takes us then to the third leg of our three-legged stool great performance, and the third lake becomes an issue when somebody knows what it is that they need to do, and two, they really want to do it, but for some reason they're still not successful. Before we talk about what that entails, let's take a look at focus and action and what we'll do is we're going to take a look at another video clip. This is a clip from the movie, The Blind Side.*

*Now, if you're facilitating the workshop, ask the group, how many of you have seen this movie? And usually about half of them have, and if they haven't, do it anyway. Set up the scene. And the movie, The Blind Side is based loosely on a true story of a young man named Michael Oher, who is the subject of this clip. He is a big kid. He's kind of adopted by a wealthy family in Memphis. And the scene that we're going to see is his first day of tackle football practice. So as you watch the clip, see if you could figure out what his problem is. The second thing is ask yourself, what did the coach thing his problem was? And then when his adopted mother comes, I think she'll identify what the real challenge is. And then once you see what it is, we'll talk about what it means. So let's watch this clip from The Blind Side and then I'll teach you how to debrief it.*

*This clip and as you're thinking about it, Michael Oher had the raw talent to play football, and he had this skill. I get the sense he actually wanted to play, but he was still not successful until his adopted mother brought out what we call a focus factor. So what she had him do is visualize the team as his family, his natural protective instincts took over from there. As interesting to note early in the clip, the coach thinks it's a problem of skill and is trying to get him to avoid holding his opponent by grabbing him this side of his shoulder pads. The coach thinks it's a skill problem. His adopted mother knows it's a focus problem and so what she does is she coaches him. And so when we go to will problems, the way to fix will problems is through motivation and we'll talk about that again more in module four, but for focus, you really have two tools that you can use. So the first one is an organization's values.*

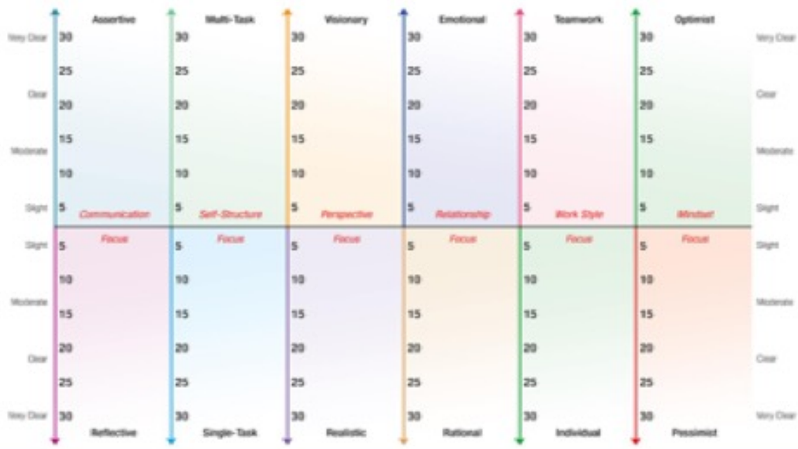
*Think about the organization that you work in right now. If you have corporate values, those are the written rules that determine how we should behave as we do our jobs. In fact, if you are facilitating [inaudible 00:06:40] your company, it might be a good idea to actually put your corporate values up on one of these slides or you can post them up on the wall somewhere and just say that at our company, we expect you to do your job well and want to do it and do it according to our values. That's one way to measure focus. But a second way that we can measure focus is with this tool right here.*

**Points to Cover:**

This video clip introduces the last leg of the 3-legged stool, the leg of FOCUS. In this clip, Michael Oher's adopted mom frames his job as "protecting the family." Note that the coach thinks the problem is a SKILL issue.

Page 39

# Focus Factors




*Now, everybody who has taken the assessment for the animals styles also will have the result for this. You should have this in a separate folder. Don't give this to them just yet because you want to talk about what it means. And so we at Boss Builders got asked a few years ago, can you quantify a focus a little bit better? So we put together a tool and it is called the MOFFA, the Munro Operational Focus Factor Assessment. And what this does is this helps identify focus factors for the actual job, not taking into account the human that's in the job. So again, we assume everybody has this skill and wants to do a good job. This helps us calibrate whether they're a good fit. And the way the focus factors work is that we have one for communication, self structure, perspective, relationship, which is the basis of making decisions as well as relating to others, the work style that the job requires, and finally, the mindset.*

*So when we start with communication, notice that there is two extremes. One going up, which is highly assertive, which means you are comfortable telling people what you want, and then reflective, more comfortable asking for what you want. Now, the key here is let's look at the job. So let's just say for example, we are hiring a new sales person. Where would you suppose we want them? Ask the group this, they'll say probably more assertive, but then switch it and say, but what if they were selling caskets at a funeral home? You see, you wouldn't want to have that assertive presence. You would want to be more reflective. So again, each job should be calibrated individually and then we hire the person that best fits or more importantly for your purposes now if these people are working for you, coach them to make sure that they're in the right standard.*

*The second focus factor is self -structure. There are certain jobs that require multitasking, do many things well and others, single task. So pretty much everybody in your group are going to be supervisor to ask them, do you think your job as a supervisor is multitask or singles task? Of course they will say multitask. Their focus factor is perspective. And the two extremes are high visionary. That's a big picture view. 35,000 feet, kind of like the men on the hill and the sheet video that you watched earlier. And the other extreme is realistic down in the details. So this is kind of a tricky one. If you were going to hire a new CFO, you would want them to be visionary. But if you were going to hire a brand new frontline supervisor in a distribution center, you probably* *want them realistic focusing on the details. So this is where you can calibrate performance of somebody who needs to focus on details, but big picture, you can coach them back into where they need to be.*

*Fourth focus factor is the relationship. Again, your framework as you relate to others and make decisions. One extreme is more on the emotional side. The other is more rational. We saw these again in the animal's styles because these pull from the same data sets. Rational means that you'd simply look at data when you make a decision. Emotional is emotion, so think about the job. What does it require? In most cases, you'll have to have a little bit of a balance. The fifth focus factor is the work style. Some jobs require teamwork, others individual effort. This is a really good one to pause on as you're with your group because as supervisors, they will probably say, no, no, teamwork's important, but the honest truth is, is that it really is more individual and if anybody in your audience was promoted from direct report to now supervising their former peers, they will no longer have that teamwork. They have to work individual, which is why if you have a group of supervisors, especially from different departments, make the point that they should really bond together. They should keep this cohort together and use each other as sounding boards because once you've been promoted to a supervisor, no longer can you complain about things to your direct reports.*

*And later in this module when we do the coaching practice, they will have an opportunity to practice coaching. Many of them we find in our workshops say that that was the most meaningful part of the course and the good news is it doesn't have to end after the course. They can continue on a regular basis to meet and just throw ideas around and more of a coaching concept.*

*The sixth and final focus factor is the mindset required to be successful, and the two extremes are optimist, which we hope for the best, pessimism, which means we trust but verify. It doesn't mean you're negative, but for many supervisors the mindset should be I trust, but verify. I mean you're the boss, right? So explain what these are and this will then lead us up to activity number six, which is focused bit.*

**Points to Cover:**

The third leg of that 3-legged stool is the leg of FOCUS.  FOCUS can be measured two ways.  First, through alignment with the organization's values.  Second through a series of Focus Factors.  Note that we must identify the factors for the JOB FIRST, then align an individual's performance with them.

Your group will have taken the Focus Factor assessment and you should have their results with you.  This sets up the next exercise.

Page 40

# Focus Fit

ACTIVITY #6

*So in their workbook they're going to have a blank focus factor tool. And the way that you set this up is to say, right now I want you to look at your current position and see if you can just ballpark by putting a mark on whatever number in those six focus factors where you think this job that you're in is, and give them a moment to do it.*

*Now what you do is you pass out their MOFFA results and ask them, compare your MOFFA results with how you just identified your job and look for areas that you have a gap. Ask the group, how many of you are an absolute spot on match and six for six? Maybe one. Usually there's not very many. How many of you have five, four, three? And then ask how many of you are a complete mismatch? And you might find one or two in there. It's not to be discouraged or quit. This is a place where now you can think about your professional development and these focus factors get adjusted by being in a coaching relationship, getting feedback, and sometimes mentoring.*

*So again, training fixes, skill, motivation, fixes will, coaching and feedback fixes focus. The first responsibility they have is to themselves. Secondly then as they sit down for one on one meetings, now they can actually, if you want, you can actually get copies of this. I have a research center for you. You can get copies of this. They can sit down with their direct reports and actually plot where the job should be and where that individual report has seen is producing. It should make for really good conversation. So those are the focused factors there, which takes us up then to another video clip, because now we're going to see that it's not as simple as it appears that everything can be measured on a three-legged stool.*

**Points to Cover:**

Begin this activity by showing the previous slide.  Ask the group to plot where they think their current role as The Boss would fit.  Mark them on the screen with one of the colored Post-it Notes.  Then hand out their individual results.  Ask the group if, based on their results, they are a good fit for their role as The Boss.  Which areas do they need help?

Remember, Focus issues are fixed through coaching.

Page 41

# What's Rocky's Problem?

*So what we're going to see is we're going to watch a clip from the movie Rocky Three. Now, you're going to see a pattern here because the last module we had Rocky Two. Rocky Balboa fights Apollo Creed in the second film and wins the title. As Rocky Three opens, he's the champ, he's making money. He's kind of getting to the point where he's thinking about retiring and this new brash challenger, Clubber Lang played by Mr. T calls him out. Rocky wants to fight. He ends up getting knocked out in the second round, his trainer dies of a heart attack. His entire world just collapses. And then Apollo Creed of all people, the guy he knocks out in Rocky Two offers to train him.*

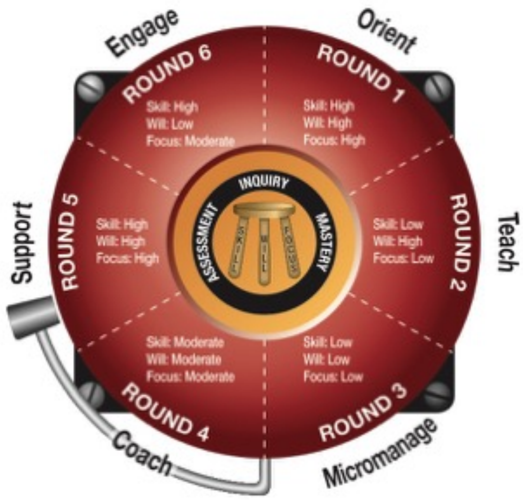
*Now, watch this clip because this is when Rocky is training with Apollo and he's not doing well. And now this is a kind of an '80s montage, is dated. You'll see by the shorts and the long socks and the drama, but watch it for a while. We have it here. See if you can answer Apollo Creed's question that comes at the end, what's the matter with you? And that'll break us into a tool that's really going to help put a three-legged stool into context. Let's watch the video.*

**Points to Cover:**

Before showing this clip, ask the group if they are clear about the difference between SKILL, WILL, and FOCUS. Tell them you are going to test their knowledge.

This clip from *Rocky III* clearly shows Rocky in a crisis. All 3 legs are broken. This leads to the next model that shows how development can cause the legs to crack.

Page 41




*Question is Apollo asked, what is the matter with you? Well, to help explain it, we have this tool here, ironically shaped like a ring bell.. This tool helps measure how a person's level of development impacts their ability to have great performance. It impacts the skill, the will and the focus. And so the way that we want to debrief the model is we started in the middle like most of these models will and this is our compass right here. This is the three-legged stool of very performance. We are after three strong legs. Now this inner ring on the inside, this is a responsibility that every one of us has, myself included. We should regularly do an assessment of how we are in terms of our production, how are we doing professionally? And then where we find gaps either we identify or maybe our boss identifies, that's when we do inquiry. We ask, how can we get better? When we find those resources, we must then master those skills.*

*Now, to do this, it also takes us oftentimes stepping out of our comfort zone, which then puts us into these six rounds of development and notice in each of these grounds the level of skill, will and focus is very different. The outside ring then is the style of feedback and coaching that we need to get us through this. This is going to be very important for your audience because their job then is to learn how to orient, teach, micromanage, yes, micromanage, coach, support and engage, because this is going to help drive performance management, performance reviews. You'll notice in each round of development here and so we've developed this for a boxing club, there's several versions in this tool that we use, but this one seems to resonate the best, so we've stuck with it. You'll notice skill, will and focus is different. And so in round one, this is typically somebody who is either new to a new role or new to the company. You can even take it out of the workplace context and say it's like a new relationship that you're in.*

*Round one is typically over confidence. So notice there it says high skill, will and focus. This is important to realize that most people when they start something new, they go on with a great deal of confidence. They say, I've got this, I'm ready for this. Your job as the boss is to orient them and say, listen, I see how excited you are. Let me just tell you that this is going to be a very different experience. And that should drop them right into round two. Round two, notice that skill is low, focus is low, but will is high. This is likely how they showed up in* *round one and you just didn't know it. Even if you are a trained professional that the new environment, the new setting, even the new company is going to be very different. And so that's generally when people are ready to learn. And so my hope if you are facilitating this program is that you have a lot of newly promoted supervisors who are in round two.*

*They don't even know what they don't know, but they're very excited to be there because now they're very teachable. And it's very important if you can spend as much time as possible when you have people in round two teaching them because inevitably, you will hit round three. Round three, generally speaking, happens six to eight weeks into somebodies new job, new promotion, new company or even relationships. It's when skill, will and focus are all low. This is exactly what we saw in the clip from Rocky Three. Rocky is discouraged, he's frustrated, he's scared and basically he just wants to quit. And so if you were to play that clip out just a little bit further and his wife Adrian really just lets him have it, lets him know, you better get your act together because we can't live like this. Sometimes you will have to take the person who is blown in the ditch, pick them up, put them back on the road. Micromanagement gets a bad rap. But truthfully, when you need micromanagement, it's the best possible thing.*

*Now, your audience will be very skeptical about this, and so I use this analogy. Feel free to use it because this one seems to make the point. Let's pretend that you are a pretty decent swimmer. You go on vacation to the beach, you swim out a little bit too far and get stuck in a rip tide. The rip tide is pulling you further out to sea. Now you're paddling as hard as you can. You can't seem to get to the shore. In a moment of frustration and fear, you call out for help from the lifeguard. The lifeguard jumps out of the tower, runs to the edge of the water, picks up the boulevard and says, okay, you got this. Just think happy thoughts. I have faith in you. You can do this. Ask Your audience. Is that what you'd want? They say, no, no. We want you to come get me. And then tell them, that's what micromanagement is.*

*Micromanagement is when you're drowning, the lifeguard comes and saves you. The reason most people don't like micromanagement is because, and let's play this out. This is what normally happens. You are a pretty good swimmer and you were at the YMCAs swimming laps in the Olympic size, a little back and forth, fancy flip turns. You realize you have a little bit of water in your goggles, so you stop in the middle of the lane, open it up and shake the water out. The lifeguard blows the whistle. Guys in the pool grabs you by the neck and tries to pull you to the side. You're like, no, I don't need this. I can swim.*

*That's how most of us have experienced micromanagement. It's embarrassing. And so let them know there's a time and a place for it when you're drowning, yes, when you're expert, no. The reason most people hate micromanagement is they were micromanaged when they didn't need it, and I'll explain how that happens in a moment. Well, if we can survive round three and this is Rocky, right? You get to around four. Round four is where things begin to improve. A person's skill, will and focus become moderate. Now they are coachable and that's why coaching is the approach. Now, with coaching, we don't tell a person what to do. We work with them to co-create solutions. You're going to learn more about this later in this module, but the key is going to be the question. Do you know what you're doing? If they say no, then you do it for them, if they say, I think so, but I need help, we know they're in round four. So at that point, we ask them, what do you think would be the best way to do this versus here's how you should do it. We want to build their confidence. The goal is to get them to round five.*

*Round five is when skill, will and focus are truly high. Your role as the boss is simply to support them. When most people get micromanaged unfortunately because they have a boss who is not secure. So now they're frustrated, so be careful. In round five we want to give them support but we don't want to neglect them* *because you'll find that everybody's going to hit at round six. Round six is when skill now is at its highest level, but now the will goes down, focus goes up and down. That's generally speaking, somebody is getting bored, somebody who needs a new challenge and that's where on your one-on-one engage them in a conversation. Let them know, hey, I've been watching you. You seem like you're just not with it anymore. What's going on? Well, I feel like I'm not growing. Well, what if we look for something new for you? So remember, whatever that new thing is, will send them to round one and the cycle repeats. Now this is where it gets kind of tricky and I've seen this play off so many times and so I want to make you aware of it so you can make your audience aware when you're teaching this program.*

*When somebody is promoted to supervisor, they go into the round ones and twos and unfortunately, normally, they hit three, but here's where things get really off off track.*

*When a newly promoted to supervisor hits round three, most of the time they don't go back to their boss and say, I don't know what I'm doing. What they do is they go back to what they used to do when they were in rounds five and they micromanage the workers there, because they're insecure and they don't know what they're doing. And that just frustrates those workers, those former peers, and they say, wow, when did you become a micromanager? I had seen this movie so many times. Make your audience aware that when you are a newly promoted supervisor and you don't know what you're doing, please ask for help because you will not get better on your own. You try to figure out it's going to take forever. Whatever you do, don't go back to what you used to do because that's not going to help you. This model is huge. This is a model that helps explain a lot of different things and you can refer back to this multiple times in the program. Well, this is where we shift gears now and we begin to talk about the actual performance conversations. So I'm going to stop it here and then we'll go ahead and start up a part two of this because this segment's even longer. I want to make sure that you don't have too much video to watch. So we'll revisit this in part two of module three.*

**Points to Cover:**

The video describes the many moving parts of this model.  The key is let the group know that Rocky was in Round 3.  That’s where most people quit jobs and relationships.  Micromanage is not a bad thing when done in Round 3, but it only works there.

Page 42

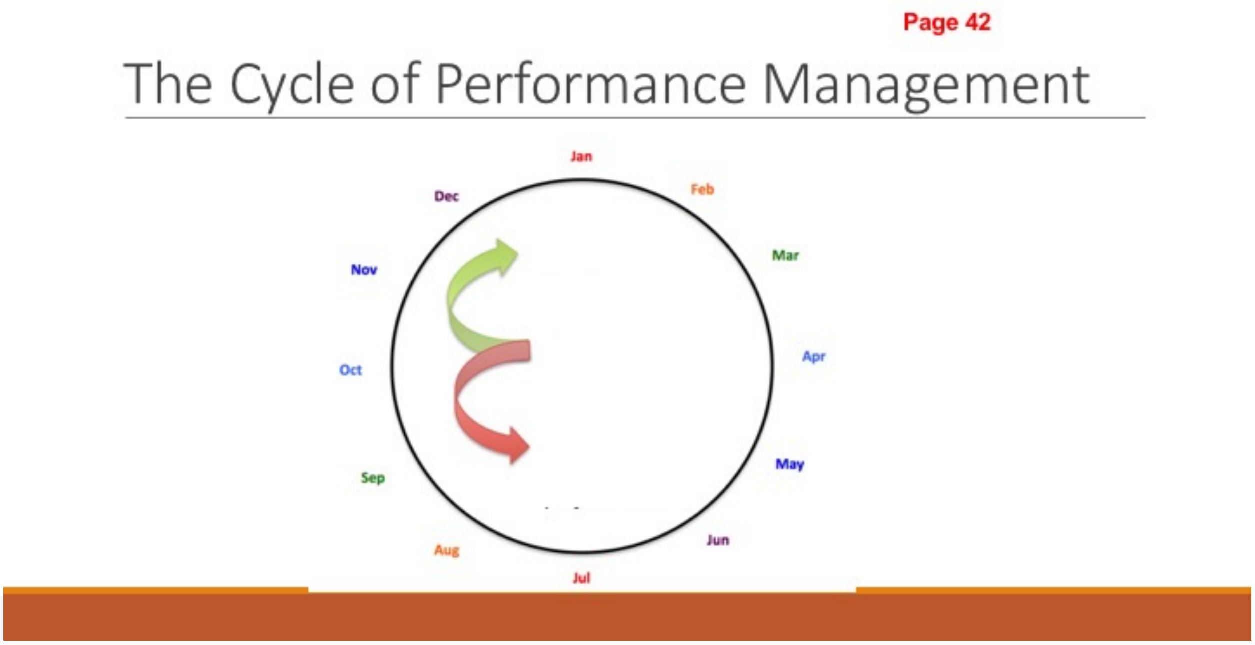
# Performance Conversations

*Further into module three, driving results, we're now going to transition away from diagnosing which we've done with the three-legged stool. We want to get into some practical application. This is where we begin to tie the material into performance reviews. Now we start this part of it with a video clip from the TV show, The Office, the UK version of it. As you start this video clip, have your audience watch it and let them know that this is a video of an actual performance conversation and then as it ends, then we're going to debrief it and figure out where this went wrong. Let's go ahead and watch the clip. Big question that I'd like you to ask the audience is number one, whose fault was that? Because it's pretty obvious that this review did not go well, and you'll hear different perspectives. It's the manager's fault, it's Keith's fault, but ultimately it's really the organization's fault because the organization has not really put a good structure in place for reviews.*

*There is just checklists. Really, Keith, I mean, let's be honest here. If he was on trial accused of being an employee at this organization, we don't have enough evidence to convict him. What I want the audience to see very early on is how these things should not go. Now, the key here is that the writers for shows like The Office get their material from real life offices and so I'm guessing some of the people in your audience may have had a review like that before. Our goal is to prevent that from happening.*

**Points to Cover:**

This clip, from the UK version of the TV show *The Office* shows a performance review.  Ask the group who was at fault for this?  Answer is:  the organization.  The organization needs to make the review a priority and ensure managers and direct reports know they have to contribute to it.

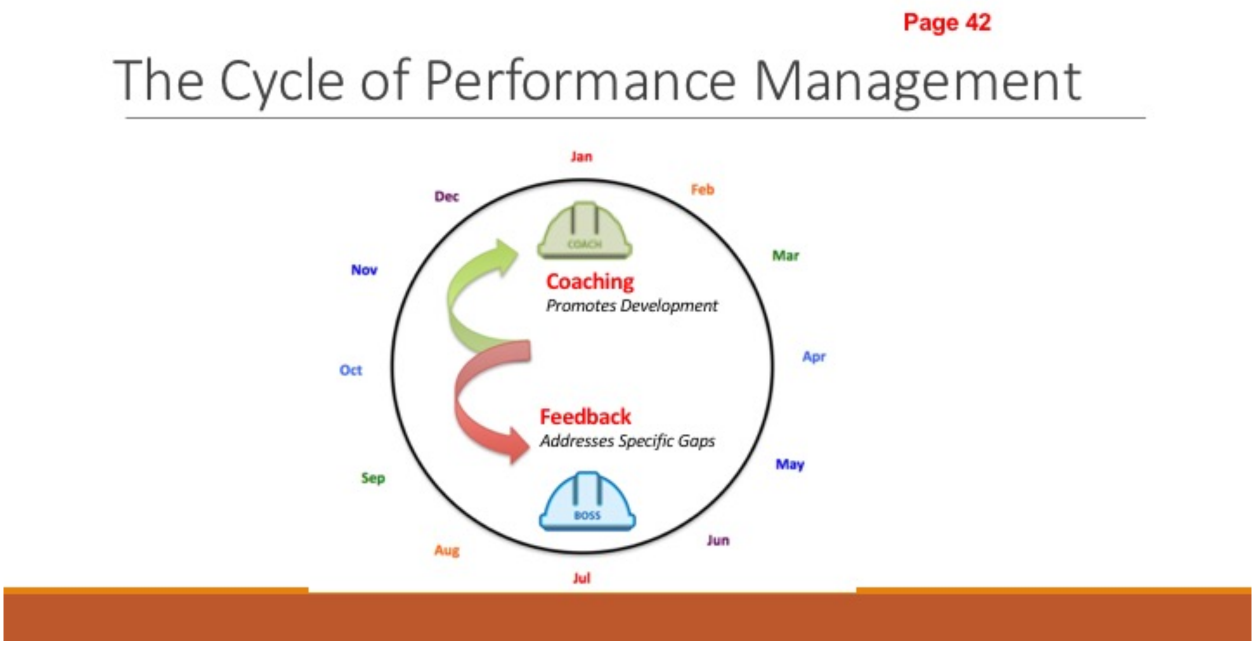



*What we're going to do is introduce a methodology that may be helpful. It begins with this, we call this the cycle of performance management. What we have here is a calendar that looks a bit like a clock, starts in January and goes around. There's a lot of different ways that you can talk about this to your group.*

*I like to draw this on a flip chart so that I can walk people through it, but there's a couple of things to keep in mind. If you are doing an annual review, it's a little bit like a 10 year old boy as that boy gets close to Christmas or his birthday, they tend to be on their best behavior. What we want to be able to do is to not have just one review every year. Your organization may have multiple, there are some that just have an annual review. Make the point that every year there should be multiple opportunities for you to sit down with your direct reports and work on their performance. In this model we have obviously the calendar, but then the question is what happens when we do these meetings? Well, this is where you can flip to the next slide.*

**Points to Cover:**

The model is best used by drawing it on a flipchart. Ask the group at what point in the year are children on their best behavior (usually November/December because of holidays). Let the group know that multiple times through the year, a formal conversation about performance must take place. The next slide shows what should happen at these meetings.




*What we have here is actually two things that should go on. At a regular interval, whether it's once a year, twice a year, quarterly, two things need to happen. Number one is a look at where we are today and a look back. We call that giving feedback. What we want to do in feedback is talk about what we liked and what we didn't like about a person's performance over the past period, whether it's one year, six months, or three months. Now, positive or negative, oftentimes I find that managers are very uncomfortable with this. That's why we insisted the idea of wearing a hat. The boss hat is the one you put on and that is when you tell people, "Here's what I thought of your performance. Here's what I like, here's what I don't like, here's what needs to improve." Now, once we've done that, then we switch to the second part of it and that's a look forward.*

*What you might say is, "The things that I did not like about your performance, let's improve those and so in the next three months I want you to work on these." That's where you put your coach's hat on. Now in this module we're going to start with the feedback, the boss hat first and then we're going to spend time with the coach hat. Both of those we have opportunities for your audience to practice those. These are the absolute keys to success as the boss is what happens in these conversations. I want to be able to give you the tools to do those better, but remember, use the idea of wearing a hat. If you're not comfortable giving negative feedback, just get over it, wear the hat. When you put the hat on, you do it. Take the hat off, now you're back to you again. The visual oftentimes helps. Well, to look at these together. We have both hats, right? You can see that both of them have a purpose.*

**Points to Cover:**

Many managers are uncomfortable having difficult conversations. Stress that you're just going to put on your BOSS hat to give feedback, positive and negative. Once you've done that, then take a look at where you want the employee to grow and put your COACH hat on to give them guidance to achieve it. These should be done multiple times through the year, not just as an annual review.

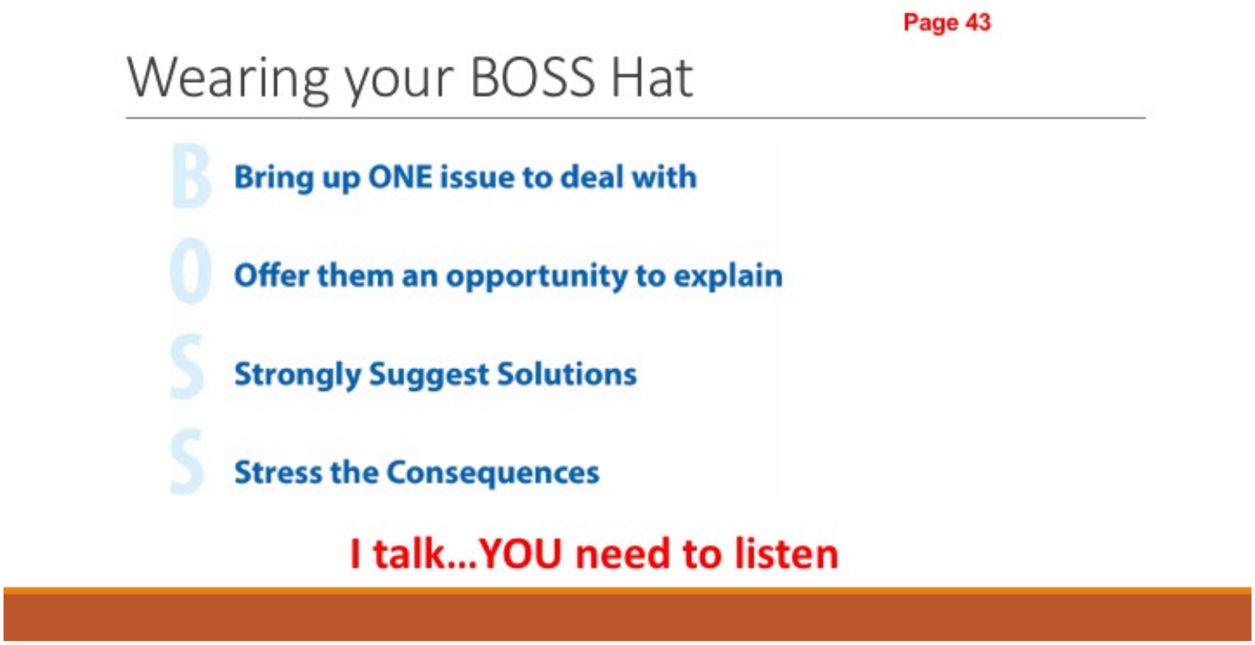
 


*The boss hat, we wear that when we want to address specific gaps in a person's performance. The coach hat on the other hand is there to develop people and so they have a different purpose. Now, you can look at the list, they go side by side and those are the opposite. While the boss is directive and diagnostic, the coach is more supporting and approaches from curiosity. What I often say is that doing the feedback and the coaching is like diet and exercise. Most people I know do not like dieting. Being the boss and doing feedback, that's like a diet, right? It's not fun, it's uncomfortable, but it's necessary. Coaching on the other hand can be enjoyable, just like exercise can be enjoyable, but both of them are necessary if you want to get fit. Both of these are necessary if you want to be a fit boss, doing the right things to develop your people. We're going to focus first on the boss hat. We've developed acronyms for both of these. These are in the handouts, in the workbooks.*

*The key with both of them, and you're going to see it like this, is that we start with just one issue at a time. Bring up one issue to deal with and then offer them an opportunity to explain. When we bring up an issue, we don't tell a person or say, "Why did you do this?" We would say, "Here's what's happening." An example from my past, when I was in the Navy, I had a boss who all the time, here's what he say, "Hey, why is there no ink in the pens up at the front desk?" I'd be like, I'm on the defensive now. I got to figure out why. If he had simply said, "Hey, just want to let you know there's no more ink in the pens up there," then I then could go fix it. Just bring up the issue, state the issue, offer them an opportunity to explain. Then because the boss had this done when somebody typically is in rounds one, two, and three, you would strongly suggest solutions and then stress the consequences.*

**Points to Cover:**

The slide shows the contrast between wearing the BOSS Hat and the COACH Hat.  One is not better than the other, just different.




*The buzzword here, the buzz phrase is this, when we wear the boss hat, I, the boss, talk, you need to listen.*

**Points to Cover:**

BOSS is an acronym.  The key is to TALK, the employee needs to LISTEN.

Page 44

## General Rules of Giving Feedback

Make feedback a regular event

Say it when you see it

Be realistic and sincere

***Be sure to get clarity on what you're giving feedback on!***

*Now we have some helps for this. We start with the general rules of giving feedback. Again, these are probably understood, but it's important that you stress them again, make your feedback a regular event. If you are an organization that just has one annual review, if you just wait for that, boy, I'll tell you, that's going to just create a lot of fear and uncertainty. Make feedback a regular event. Get people used to you giving them feedback and then say it when you see it. If there is something positive or negative, don't wait around. Take care of it in the moment before it gets to be a bigger problem. If it's something positive, you want to recognize the person so they do it again. Then be realistic and sincere. Realistic means set a standard that a person has the capacity to attain and sincere means that they know that you care.*
*This is why building rapport from way back in module one is so important to stress right now. Let them know that sincerity comes from rapport. Then of course, be very clear on what it is that you're going to be giving feedback on.*

**Points to Cover:**

General rules of feedback for both positive and negative feedback.

Page 44

# Positive Feedback

1. Be specific.
2. Be enthusiastic.
3. Be sure they know exactly what you loved about the result…so they can REPEAT it!

**PRAISE**

- **P**ICK one accomplishment to focus on
- **R**ECAP what you saw or heard
- **A**SK them how they achieved it
- **I**DENTIFY ways they can get even better
- **S**END them off with encouragement
- **E**NSURE you documented their achievement

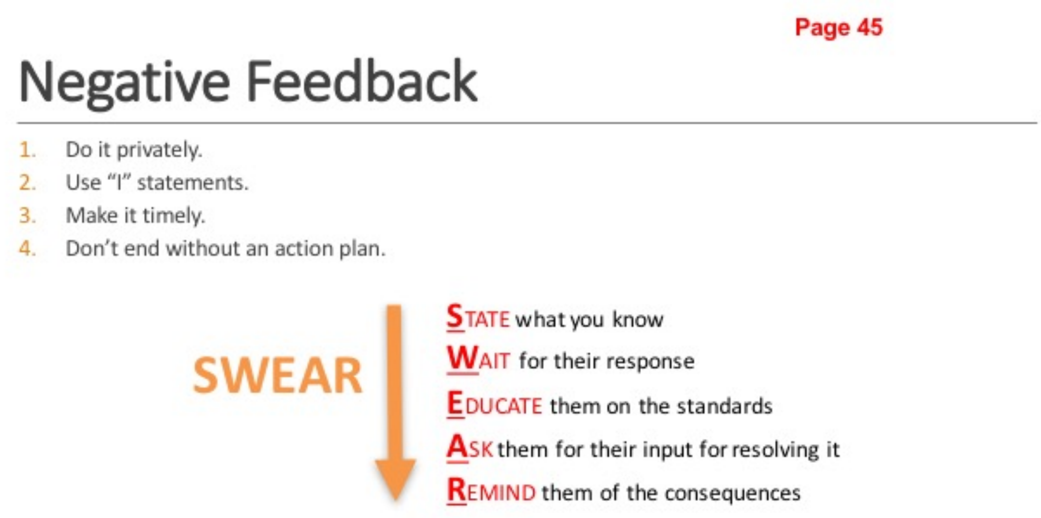
*Well, there's two types of feedback that you can give a person. The first is the fun one, right? The positive feedback. We've got a couple of standards for that. First of all, be very specific. Don't just say, "Hey, great job today." Say, "Hey, I really like the way you did," blank. Whatever that is. Be enthusiastic. Even if this is not your personality, show some excitement so that the person know, hey, you were really amazed at it and be very specific about that so they know what they can repeat. Let them know, "Here's what I loved about what you did. I'd love to see more of it." Then we have a little acronym that's helpful. When somebody does something good, you will praise them.*

*This is how PRAISE works. We pick one accomplishment to focus on. We recap what we saw and heard, and then we want to ask them how they achieved it. Now, the I is a little tricky and I'll explain it. Identify ways they can even do better. Send them off with encouragement, and to make sure you're documenting. Let's just say I have an employee, we'll call her Sally. I get a call from accounting and they said, "Hey, one of your employees, Sally, gave us the budget numbers and she used a really cool spreadsheet, made our job a whole lot easier. Just want to let you know your employee did a great job." My job now is I got to tell Sally. I would talk to Sally. I'd say, "Hey Sally, you got a minute?" "Yeah, what's up?" "Hey, I just got a call from accounting and they said that you did our budget in this really cool spreadsheet. They said they really appreciated it. How did you come up with that idea?"*

*Then Sally, blah, blah, blah, whatever she did. Then say, "Sally, would you be willing to share that with some of the other departments? I would do it, but I want you to get the credit." That's the I in PRAISE. Getting better doesn't mean I'm going to make more work for you. I want you to even get more recognition. Send them off with encourage. "Sally, I just want to let you know, you are one of my top performers. I appreciate it." Then you document it so when it comes time for reviews, you can remember it because as the boss you get busy, right? If you got a bunch of employees, you may forget about this if this is early on in the performance cycle. When they do well, we would praise them.*

**Points to Cover:**

PRAISE is a step-by-step guide to giving positive feedback. Stress that IDENTIFY ways to get better should not mean more work for the employee. Maybe give them a chance to demonstrate their accomplishment for others.




*Now of course we know it's not always going to be that nice. We do have the other shoe that sometimes has to drop and that's the negative or constructive feedback or critical feedback.*

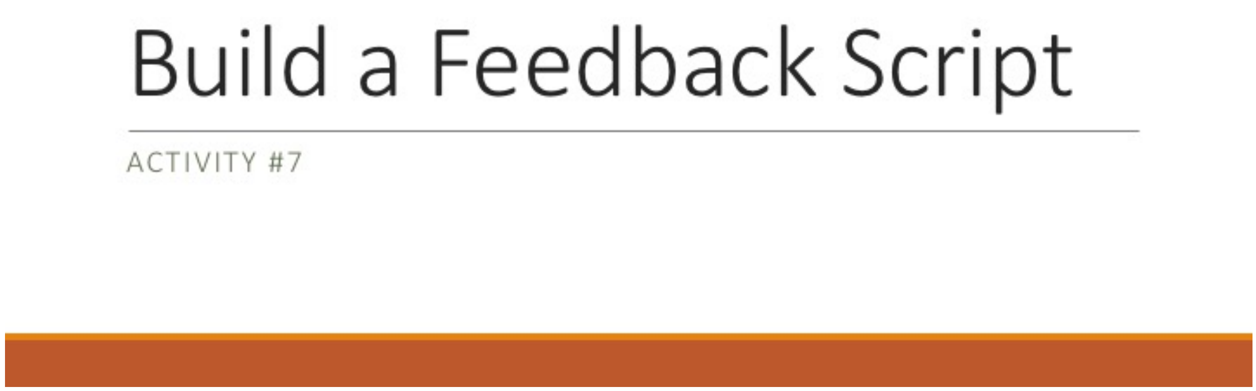
*This is one we want to make sure we do it privately. Nobody has ever been motivated by being made an example of, I can tell you that from my experience in the Navy, it does not work. Use I statements. Don't say, "Well, management wanted me to tell you that was unacceptable." You own it. I feel this way. I observed this. Make it timely. Make sure it's done as soon as possible so that's not hanging out there and the bad behavior doesn't continue. Whatever happens, don't end without an action plan. If you are going to call attention to the deficiency, make sure there's a way to fix it. The acronym here is SWEAR. Remember, if somebody is good, you praise them. If they do something bad, you swear at them, not literally, but you would follow the acronym here. State what you know. "Sally, you came in late this morning, it's the third time in the last two weeks." Then you just be quiet.*

*You wait for their response. Now they will give you excuses, whatever that's going to be. Then the E is educate them on the standards. "Sally, what does time and attendance say our working hours are?" "I don't know." Then you would be specific. "They are 8:30 to 4, so 8:30 means at 8:30 you are sitting in your chair, your hands are on the keyboard. That's not your running and grabbing coffee, talking to your friends. It means 8:30 is go time. Now, what can you do differently tomorrow to make sure you're here on time?" That's the A. The last one is remind them of the consequences. If this is third violation, whatever it is, let them know, "Hey, next time there's going to be written warning," or whatever that is. Before you sit down and do the SWEAR, make sure you know what the consequences are and can be because you don't want to get something that's not enforceable.*

**Points to Cover:**

SWEAR is the step-by-step process for negative feedback. The key is STATE. Just tell the facts. “You were 5 minutes late” and then wait for the response. Before giving the SWEAR, be sure of what the consequences are and what you can enforce.

Page 46




*That one is not nearly as fun but I promise you, if you get good at it, your deals are going to be so much easier when you're dealing with poor performers. Which brings us then to activity number seven. Now, what's really neat about this is that this is a rehash of what we did way back at the beginning in the introductory module. What you'll do is you'll go ahead and put up this shot, this slide back up on the screen and say, "Hey, do you remember this from way back when? What we're going to do is we're going to do it over again, but this time you now have some tools. You have the SWEAR script, you have some of this. I'm going to give you 10 minutes and I want you to write me a feedback script to deal with this."*

**Points to Cover:**

Now we revisit the exercise we did back in the Introduction. Have the participants work in their table groups again to build a feedback script this time using SWEAR. The case study is the same but this time you can add in some variables and information in the following slides.

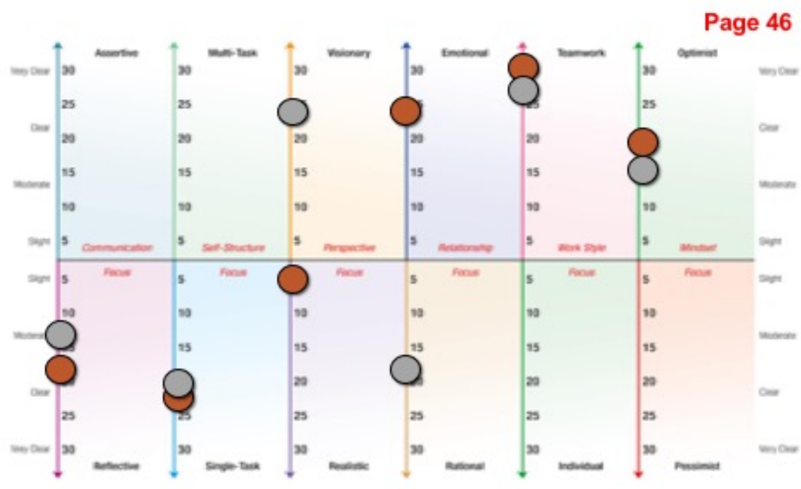
Page 46

## Ted has an "attitude problem"

- Late 3 times in the past 2 weeks
- Was overheard badmouthing you
- Told one of your best customers to *"F#&% Off!"* on the phone *(3 credible witnesses heard this)*
- Seems apathetic and lethargic

*Now, you can tell them this, "You can deal with any of the violations, you can pick one. It's completely up to you. You can use the SWEAR script or if you have something that you'd like to try that's just as good, you're welcome to do that. Then what we're going to do is we're going to evaluate the scripts." Let them go. Give them 10 minutes. We also have this, you can put this up and say, "Hey, I've got a little piece of information. This is Ted's focus pattern. Now the job, the goal is the gray ones there. The orange ones are Ted's." You could give them this additional piece of information because what you're wanting to do here is give them some additional ways to look at the scenario. Give them their 10 minutes at the end. Then what you're going to do is you're going to just recognize all of them. We won't really necessarily have to role play this one, but you know you might want to. That's the test to see how good it is.*

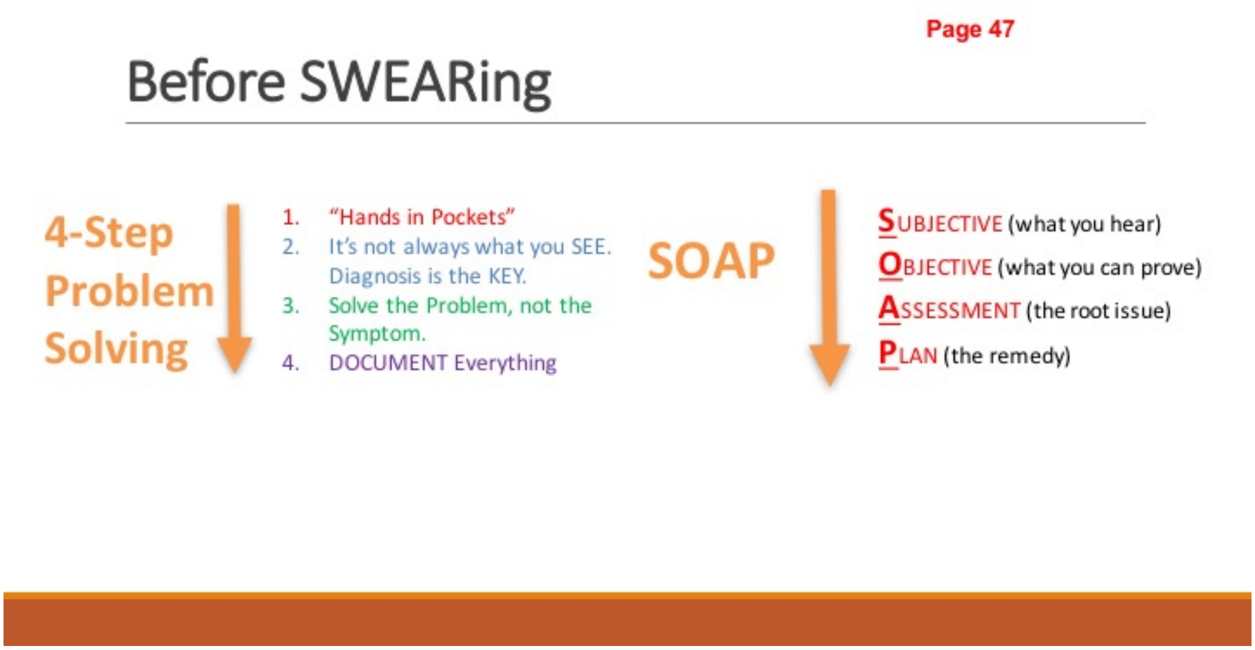
*Have them read the script and then especially the group that you picked first that probably messed up, actually see if you can role play it again with them and see if they do better. Then tell them that we have some additional tools. Now these are found on page 47 in the workbook and the slide is going to be this one here. These are some really great diagnostic tools. We start with the four step problem solving process and it starts with step number one. Step number one is hands in pockets. This is something that I learned from my brother who was a handyman and he always told me, "Mac, when you're going to do something project related, first step is put your hands in your pocket so you're not cutting holes and mailing stuff in, scope it out."*
*The same thing applies here. That situation with Ted, if you're upset, well, you could go in there and really make some mistakes. Step number one, hands in pockets, think about it before you do it. Step two says it's not always what you see, diagnosis is the key.*




**Points to Cover:**

About 5 minutes in, show the group this slide. Let them use some of this data as they put their script together.

Once done, have the groups read their scripts. Role play it again with the same group you did in the first run. They should do much better. Then role play it with the other groups too.




*One of the best tools you can use for that is this tool right over here. It's the SOAP tool. Now the SOAP tool is actually from the world of medicine. What makes it unique is it's designed to do two things. Number one, it's designed to document signs and symptoms so that if a person is going to get referred to a specialist, they don't have to get the same tests again. It also gives you a tracking system to see if you can come up with what the root issue is.*

*What we're going to do is we're going to toggle back and forth with the previous slide and we start with information. The first step then, and we're in step two of the four step problem solving, we'll get back to the others in a moment, is number one, we've got to separate subjective from objective data. You can ask the group, what do you know about subjective data? Well, they'll say it's hearsay or it's an opinion and that's true. Objective data then is based on facts. It's something that you can prove. We're going to solve the problem with Ted and let's go back to that. First thing we got to do is separate subjective from objective. The subjective data, you can ask them what is subjective data? Well, the overheard badmouthing you is subjective and you say, yeah, exactly, what else?*

*Apathetic and lethargic. Good. Even the attitude problem, that's something that you have to prove, right? Right now, this does not stand up. It's not admissible, I guess, as evidence. It's important because it tells us there's a problem, but we can't solve it based on subjective data. The object of data then is the first one, right? Late three times in the last two weeks. We could prove that with time and attendance. Number three then that is somewhat subjective but if we were to call the customer up, we might be able to get more specifics there if we had a phone call recording. Please, stress to the audience that you do not name the witnesses and don't even mention you have witnesses because just like your role play at the beginning, you're going to take them on a tangent and trying to find out who those people were.*

*Well, if we'd go back then to the SOAP tool, the next step is the assessment. What is the root issue? Well, the root issue here, and again this is based on a true story, is that Ted was one of your go to people, one of your best people. You had to have the team come in over the weekend and everybody came in. They solved the* *customer's problem. Monday morning, you felt so good about the team's progress that you brought in donuts. Ted had already scheduled a doctor's appointment for Monday so by the time he got in, all the donuts were eaten. About a week later, that scenario that we just looked at way back here began to happen. Now the audience will roll their eyes and they'll laugh, but you know what? That donut represented somebody recognizing him. The bottom line is the assessment, the root issue is Ted did not feel recognized. Now we're going to look at this in module four with motivation.*

*Well, the last thing of course is that we have to have a plan, the remedy. Now you have to realize that right now Ted is not going to have a donut and have this go away. He is actually, you know, he's made his own mess with this. He is taking it to the extreme. Right now, the only reward should be punishment but had we caught this the day after it happened, we would have been able to give him the donut. Everything would be better, which is why that building rapport, taking time to check in at the beginning of the shift is so important. Well, step three is solve the problem, not the symptom. This is why we want to go again. Let's look at the objective data and work with that, not subjective.*
*Then of course number four is to document everything. If it's not documented, it never happened. Let's say that down the line you've got to get rid of Ted for whatever reason and say, "You know, we had that incident a few months ago." If it's not on his record, it didn't happen. Documentation is key.*

**Points to Cover:**

These two processes will help in diagnosing the root cause of Ted's issue.  All of this started because Ted was not recognized.  If we had identified this problem early, we could have prevented it.

When talking about the SOAP process, draw it out on the flipchart and pull up the slide with the case study and have the group.  Have the group identify the Subjective and Objective data.

Page 48-49

## Common "BOSS Hat" Errors

- Halo Effect
- Horns Effect
- Central Tendency
- Recency Error
- Leniency Error
- Severity Error
- Similar-to-Me Error
- Different-from-Me Error
- Spillover Error
- Status Error

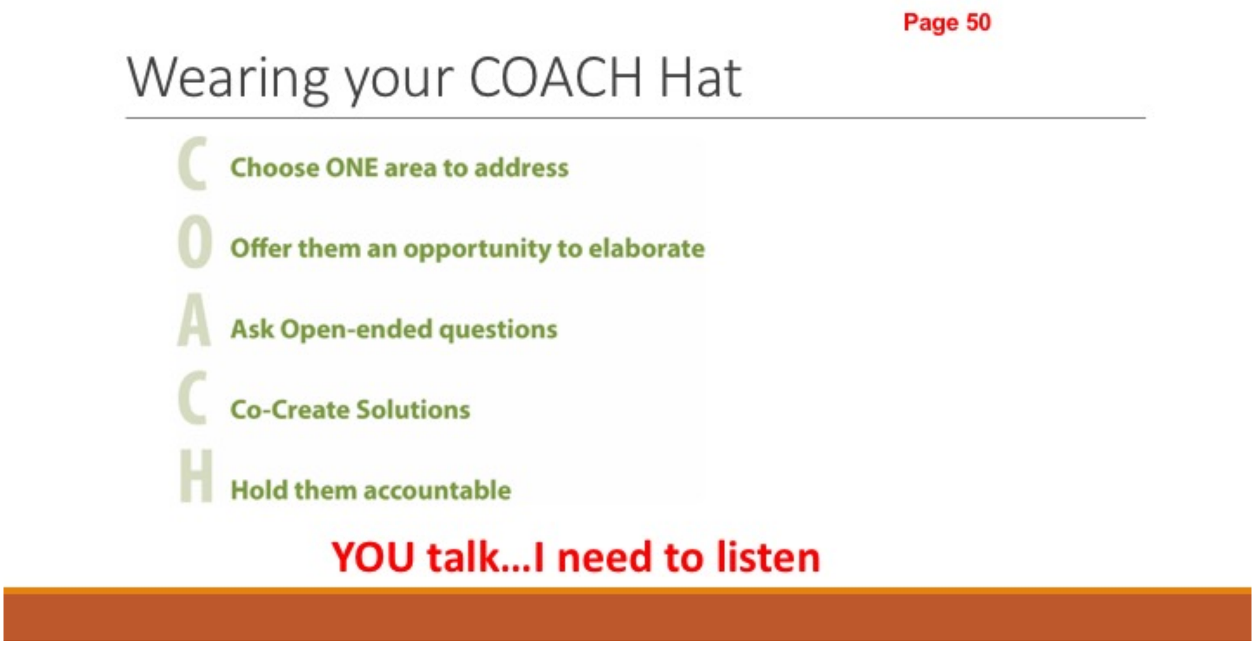
*Before swearing, walk through the four steps and look at the information using the SOAP tool. You do that, there's a very good chance you have a much better outcome. In your book on page 48 through 49, there's a lot of common boss hat errors. These are oftentimes things that happen when you're on the highway to hell, you're not paying attention and so there's good descriptors in the book if you want to use personal examples, you can. Some of these run together. For example, halo and horns is when, and again, this is subjective stuff. Most people don't do it intentionally, but it tends to happen.*

*Halo is I'm singling out one thing I really like about the person and overlooking the other. Conversely, horn's effect is there's one thing the person does that I don't like and it makes me overlook their good accomplishments. [Central 00:18:39] tendency happens when you're rating people and you get tired of having people complain so you just rate everybody right down the middle, which is unfair to the people who have really performed well. It's unfair to artificially promote somebody's performance if they're mediocre at best. Recency is what we find like the example of the kid who behaves near his birthday or Christmas. Leniency and severity are often things that happen with a newly promoted supervisor from peers. Leniency is when you take care of your old friends and severity is when you go back to punish your enemies. Similar to me and different from me are like halo and horns.*

*Similar to me as I like you. Maybe because you were in the Navy. Different is, I don't respect you because you were in the air force, right? Spillover is when we allow past performance to influence current performance. If you have been a stellar performer over the past few years, I may not be looking as critically at your lack of success. Conversely, you could have been a troublemaker years ago and I have a hard time letting go of that. I'm not rating you for what you do right now. Status error may happen if you have the kind of organization where maybe somebody is a relative of the big boss or something. Just be careful that a person's not going to be intimidated by somebody's status. Again, those are things that most people would not do intentionally, but you're bringing it to their attention so they absolutely won't do it in the future.*

**Points to Cover:**

Refer the audience to pages 48-49. Let them know that most of the time, people do these unintentionally. They are usually Highway to Hell problems.




*Well, that takes us into the next section here, which is on coaching. Wearing your coach hat. Again, you can reiterate the point that the feedback and coaching are like diet and exercise. The diet is never fun and the feedback you can already see aside from doing the PRAISE, it can be pretty uncomfortable. The coaching hat can be fun. Again, we have the acronym similar to boss. We want to choose one area to address, we offer an opportunity to elaborate but then we want to get more information. We ask open-ended questions, questions that don't have a yes or no answer to them. We want more information. We co-create solutions because again this is designed to get them to be successful and less relying on you. Co-create solutions but they own it, hold them accountable for whatever they decide.*
*This is different than boss hat because wearing a coach hat means, you, the individual does the talking, me, the coach hat guy, I just need to listen.*

**Points to Cover:**

This is the official transition to the Coaching part of performance management.

One analogy we use is that fitness comes from diet and exercise. The diet and exercise of performance management is feedback and coaching. Feedback is uncomfortable, like a diet but coaching is like exercise. Exercise can be enjoyable, as is coaching.

Remember to stress that in feedback, The Boss will do the talking, but in coaching, you'll do more listening.

Page 51

# PULL Coaching

P: PICK an issue to deal with.

U:UNDERSTAND the current situation.

L: LEARN more through open-end questions.

L: LEAD them to a solution

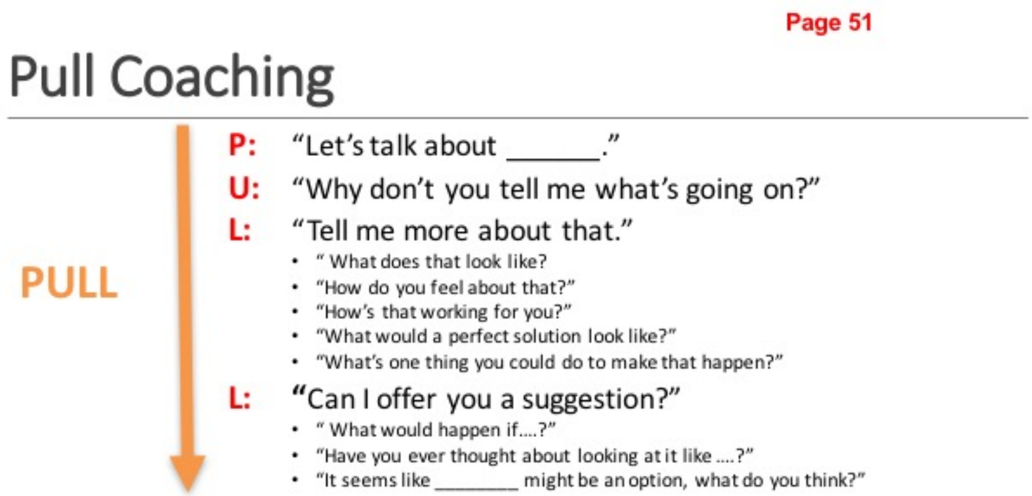
*Now to help you, there is a methodology that we promote. It's called pull coaching. We have PRAISE and SWEAR and SOAP and now we have pull. Don't let that be lost on you that in pull coaching we are trying to gain information from others. We're pulling it out of them rather than pushing it. We pick an issue to deal with. We take time to understand the current situation. We learn more about that through open-ended questions, and then we want to lead them to the solution. We do this, especially if they're fighting round four or sometimes round six. The pull coaching is very, very useful.*

*Now we have some sample questions here. Then in your book you're going to get the six steps. There's tons and tons of good questions, but this is the short version of it. The first letter in pull coaching is, "Hey, let's talk about whatever it is, tell me what's going on." Then the learning more through the open-ended questioning, there's some good ones there. What does that look like? How do you feel about that? How's that working for you? It's one you might use all the time but if a person basically created their own mess, we would use that. What would perfect look like because especially when they're in round four, right, their will goes up and down. If they start to get down and discouraged, then we'd say, okay, what would perfect look like. Then they might say, "Well, I would be a master at this." "Okay, good. What's one thing we could do now to make that happen?"*

*We want to raise them up and then push them even higher. Then the last one there, the last L is we want to lead them to a solution. "Can I offer you a suggestion?" They'll probably say, "Yes, tell me what to do." You say, "Well, I'm going to tell you what to do, but have you thought about looking at it this way? What would happen if you were to try this?" See, you want to make it look like it's their idea, even though it's yours, because you want to make them self-reliant. You don't want them constantly bothering you with the same problem every time. You want them to grow and outgrow the problem. Those are some really good tools. Again, pages 52 to 55 in the workbook has a ton of sample questions that follow this six step longer coaching process.*

**Points to Cover:**

The PULL methodology is the shortcut to coaching. There is a more detailed 6-step process in the next slide and several pages in the book.




**Points to Cover:**

The key for coaching success is in the questions.  These are some good sample questions.  Many more are found in the workbook.

Page 52 - 55

# 6 Step Coaching Process

1. Initiate the Conversation
2. Establish a Supportive Relationship
3. Communicate from a Place of Curiosity
4. Collaborative Thinking
5. Formulating Goals and Plan of Action
6. Maintaining Progress and Accountability

*This one works pretty good if you don't have a lot of time. You got like four minutes to handle it, but when you have time or you're going to do over the series of several hours, you know, struggled over a week or whatever, six steps is ideal. It's awesome. Great questions in there. Great approach. The one question you must never use is the question why.*

**Points to Cover:**

Pages 52-55 detail the 6-step process and give many sample questions to use.

Page 52 - 55

## An example of PULL Coaching

*Now we're going to look at an example of pull coaching here. This is a scene from the TV show, Seinfeld, yet again. Now in this scene, George Costanza had gotten frustrated at work and just went out and quit his job. He realized that he probably made a mistake. I believe down deep inside he knows he needs to go ask for his job back but if you tell him that, he's going to get mad. Now he's asking his friend Jerry to help him think through some options. Jerry is going to use a version of pull coaching here. Remember the goal is to get George to agree to beg for his job back.*
*In the end, you're going to see how Jerry leads them. Let's watch and then I'll bring up a few more points. Let's watch. George says, "I think this could have been a huge mistake." The next thing he should do is say, "I'm going to go get my job back." If you watched the episode, George decides to pretend he never did quit and he walks in like nothing changed. The thing to understand here is that Jerry didn't do a lot of talking, but the fact that he asked good questions and made statements helped George narrow down his options and get it to where it should be.*

**Points to Cover:**

In this video clip from *Seinfeld*, George has quit his job and knows down deep inside he needs to go back to his boss and ask for it back. Jerry is using a coaching approach to help George make this decision, but without telling him to do so.

Page 56

# Coaching Practice

ACTIVITY #8

*Well, like anything else, it's important that you practice this. What we're going to do now is we're going to do some rounds of coaching, coaching practice. My recommendation is you break them up in groups of three. In your kit you're going to have a stack of fake $100 bills. I want you to give each person in the group two of those $100 bills and say, "That's your money right there. You should keep as much as you can, but I'm going to give you a way you can earn more."*

*The thing is people are saying, "Well, what are we suppose to do?" He said, "We're going to practice coaching each other." Then they'll probably say, "Well what are we supposed to coach on?" Well, if you've written on a flip chart somewhere, the list of their leadership and management challenges from the intro, that's when you pull that out and say, well, you know, earlier you said for some of your challenges. I want you to coach each other. The way we're going to do it is three rounds. One person will coach and one will be coached and one will observe. You'll let them go for just five minutes. That's all it's going to be is five minutes. Set a timer and let them know. If you are coaching, then be very careful not to use the word why when you ask questions, why is confrontation. We do not want to use it. If you're being coached and you get asked a why question, you can take your coach one of their $100 bills. That's how you earn more money.*

*We often find that when people know there's a consequence, they won't do it. We're trying to train them now. You're trying to train them not to use the question of why? Because it puts people in a corner. Set your timer five minutes and let them know in five minutes we're going to stop. If you get done before five minutes, don't switch roles. I want you to wait for everybody. We let it roll. When the timer goes off, then you stop and say, all right, round one is done. In round one, how many of you felt kind of uncomfortable? Several hands will go up and say, "Yeah," because you didn't really have time to build rapport. That idea from early on in the program comes back every time when you build rapport and relationship, the coaching is going to be that much more comfortable. Then ask, how many of you got your problem solved in round one? Well, there's always a few that say yeah and you can say, you know, "Well, it must not have been a big problem."*

*They say, "No, I was just talking to somebody about it, made it better." You can ask how many of you at least have a couple of ideas, and that's beneficial too. Well, then we go to round two, they're the same thing. We switched roles. One observer, same thing, five more minutes. Then in round three we do the same thing. We'll see how many people keep all of their $100 bills. Most people will lose it because it's very easy to say the why question. Now if you're doing this in groups of two, what I often have people do is when we switch roles is to have the coach in round two stand up and go work with somebody different because if you are in a group of people who don't normally work together, you want people to work with different people. What you find at the end of this activity is people say, "Well, this is really helpful." Then you can say, "Well, you know, back when we looked at the focus factors, remember, many of you now don't really have a team. This is an opportunity for you to create a team and maybe once a month, even if it has to be by phone, go through this coaching practice for your own benefit."*

**Points to Cover:**

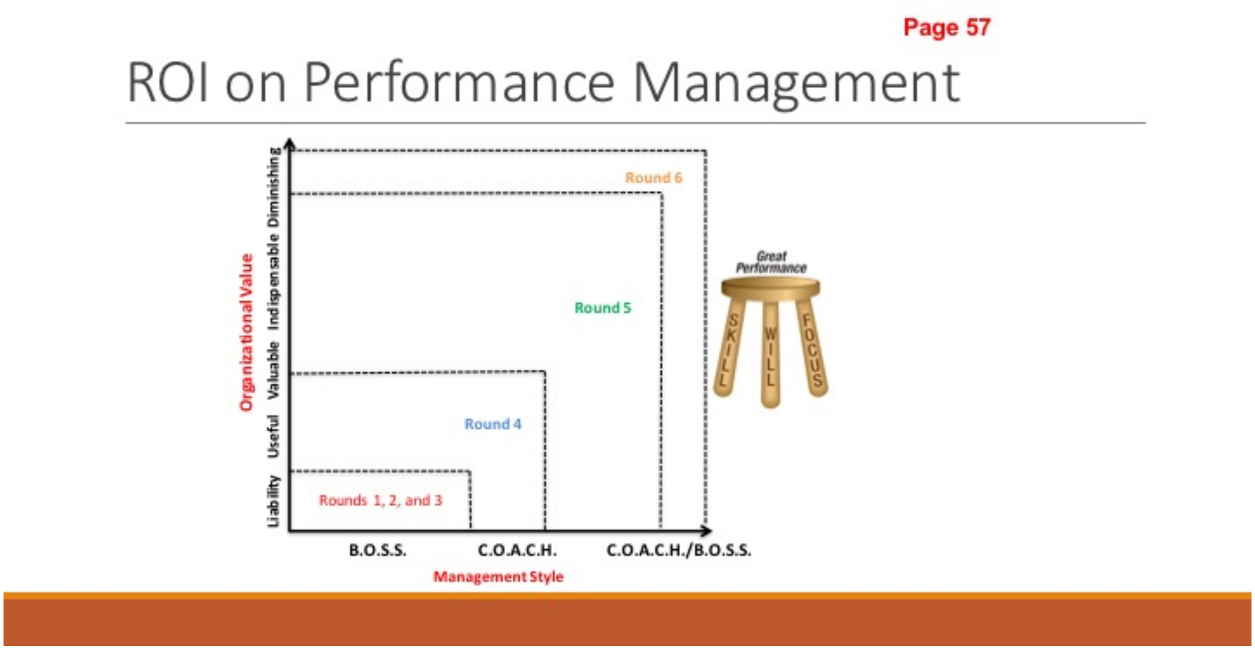
This is one of the most popular activities in our program. Have the groups break up into teams of three. One will coach, one will be coached, and one will observe. Hand each person two of the fake $100 bills.

Have them do three, five-minute rounds of practice. The person being coached can choose to be coached on anything they are currently struggling with but an ideal topic would be what they identified in the introduction as one of their major challenges.

If the coach asks a question that begins with WHY, the observer will take away one of their $100 bills and give it to the coachee. This should help break the habit of asking a WHY question during coaching.

Stop after each round for a debrief. In the debrief, ask the observer to identify some best practices.

Tell the group that the coaching doesn't need to stop here. They may benefit from doing this with each other on a regular basis to practice and for their own benefit.




*Of course, we want you to take it out and use it as part of performance management, right? The five minute segments are short. They're designed to be short, and it should be enough just to get them excited to want to do more. This is going to be one of the most powerful parts of this program so really stress the importance of asking good questions in getting good outcomes. Well, we'll end this section with the ROI because a lot of people want to know, why should I do it? Well, to be honest, you do it because it's a cost problem here, right? In this graph we have the Y axis. It shows the organizational value of a person that works at your company. Across the bottom is the development rounds and the management style that you would need. The key here is that when somebody is in rounds one, two or three, they are a liability and they could do something, they could cost the company money or reputation. They could make a huge mistake.*

*We want to make sure that we are working very hard to get them through round three as quickly as possible because until we do, we're losing money on that new hire. We hit break even when they're in round four. Notice round four you can switch to more of the coaching approach. Round five is when they become indispensable, and yet round six, the value diminishes. One way to think about it, you can ask them, what would life be like now if all your team was in route five? You'd be doing really well. Also, let them know too that the value can go down. We got to make sure that we're constantly challenging people, but no matter what, we cannot afford to leave them in rounds one, two, three.*

**Points to Cover:**

This graph makes the point that managers need to get their people developed as quickly as possible.  In Rounds 1-3, employees are a liability due to their lack of skill.  In Round 4, we break even.  5 is where we want people to be but pay attention to Round 6 as the value is diminishing.

Page 58 - 59

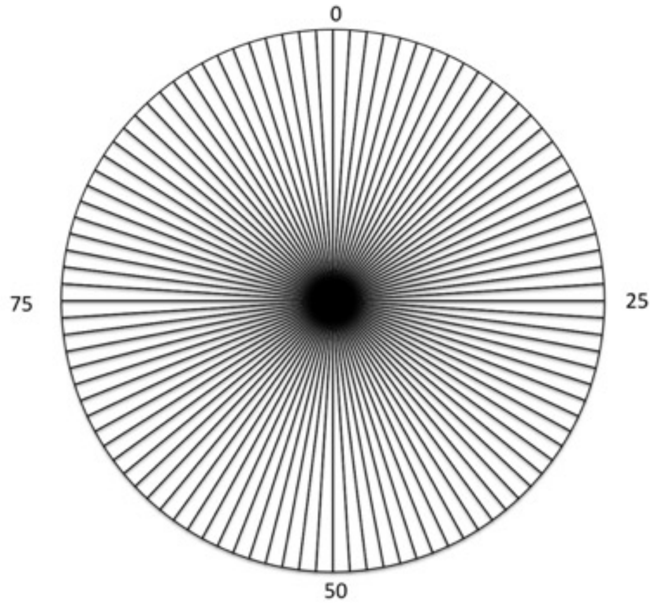
## Tools for Use

*From here, we're actually going to expand a little bit and look at some tools. Now, page 58 and 59 have tools. One of them is for addressing performance and one is for having career conversations.*

*The tools we're going to use for that are going to come up after we stop because this is a big segment. Then those we'll build into diagnosing team performance and delegation, all pieces that really balance from this module. Take a look at the tools, they are also available on the resource side if people want to get them. They're really nice tools for walking people through either dealing with a poor performer or having career conversations with somebody. We'll pick it up in the next video.*

**Points to Cover:**

Refer the group to the guides on pages 58-59. These are to be used in feedback and coaching conversations. Copies of these can be found in the portal or at www.TheBossBuilders.com/helps.




Page 60

*Look at the last section of module three, Driving Results. So we've gone through some of the basic tools of performance management. The second segment, we talked a lot about the feedback and coaching process, you got some practice. We ended up with some tools to use. You find those on 58 and 59. so now we want to talk a little bit about professional development, and so we're going to use a tool that's called the life odometer. Now the purpose of this tool is to help a person that's trying to figure out what they want to do career-wise, have a new perspective. Now, I created this years ago working with a customer of mine down in Georgia, and it was really designed, there was a group of people that were very unhappy in their jobs. They were in their sixties, so they were pretty close to retirement age. Their training manager wanted me to help them think it through. So I created this, and I'm going to explain how to use the tool and then the benefits.*

*So put this up on the projector, and have your group open up to page 60 and just let them know that this tool is called a life odometer. Each of these spokes represent one year in a life of a person, starting with one and going to 99. What you're going to have them do is to make some marks on their life odometer, and then we'll talk about what this means.*

*So the first thing I want you to tell them is to say, all right, the first year or age I want you to find is the age you were when you made the conscious choice to be in the current career that you have. So, in my case, I was 33 when I decided, so I would find 33 on the life odometer, it'd be in here someplace, and just make a little mark on the side. The second age that you have to find is 67, so you can start down here at 50 and count up to 67. Put a little mark at 67. the third one's a little tricky. So if you're a man, find 84 and put a mark. But if you're a woman, find 86 and put a mark. So have everybody do this. Then the last one that they find is the current age. So find whatever current age they are at the time of this video, I'm 54, so I'd put a little mark right here.*

*Now the last construction is have them shade in the segment of the life odometer between their current age and 84 if they're a man, or if they're a woman, their current age and 86. Have them shade it in. So with a pencil or whatever they're using, they can lightly shade in the little spokes of the wheel. So it's going to look like a slice of pie. Depending on the age of the group, it could be something pretty wide or something pretty small.*

*Then you walk them through the meanings, and this is in your instructor guide as well. So here's what it means. Let them know. The age you were when you made the decision to be in your career is the age that you gave up the right to complain because you made the conscious choice. 67 is the median retirement age in the United States. 84 is life expectancy for men, 86 for women. So what you've just shaded in is how much time you have left on the clock.*

*Now, depending on the age of your group, that might be insignificant. It could be a group of people that are in their thirties, and they'll say, wow, look at all the time, but I have had groups of people that were in their sixties that get really quiet, and they say, wow, I didn't realize there isn't that much time left. Part of this, of course, is for them to think about financial planning. If you're in your thirties, you've got to realize you've got a lot of years to make up for retirement. But between retirement and death, there is a lot of years in there as well.*

*The main purpose of this tool is to get people to start taking their career development seriously, and the audience, you as the boss, have to make this part of your to do list. So when you're meeting with them one on one, just have the conversation, and this is not a mandatory tool to use. This is just a suggestion for a select group of people that need it. So for example, I have used this with people who are nearing retirement age and just feel like they're going to coast to the finish line. I've also used this for retiring military. Now retired military could mean they are as young as 38 years old, and I get a lot of them that say, Well, I may work a couple of years and I'm going to retire, retire. I think, Wow, what, 40 years old, you're going to retire and you have all this time? You have time to have at least two more careers if not three.*
*So it's designed to get them thinking, and then of course the audience of people who are managers should start taking it seriously, that I want to help my employees make the most of whatever time that is. That's the use of the life odometer.*

**Points to Cover:**

The Life Odometer™ is a powerful tool that helps senior employees get serious about career planning. Guidelines for using this as a demonstration are in the video.


*It leads us to having discussions, and so the next slide then is a set of questions or paired statements that are important to keep in mind as you're having these career development questions and performance management questions and discussions with your team.*

*So we start with the top left there. Curiosity versus assumption. We've looked at that a little bit already with the coaching, but what this means is that when I'm having conversations with my direct reports, I need to operate from a perspective of curiosity, not assuming something.*

*Activity versus accomplishment. This is an important one too, because a lot of managers I find, they are so worked up about the uncomfortable feeling of having to do one on one conversations, they get busy with other stuff and they say, Well, I would develop my people but I don't have the time. Well, that's activity. Accomplishment is the most important thing. This is also useful for the people that will be in your workshop when they hear this from their employees. Hey, I would work on those things but I'm too busy. Okay, well, are you busy with something that I assigned you or stuff that you're making up so that you look busy? So don't be confused. It's accomplishment, not activity.*

*Want and need. We discussed that with the whine buster tool. So it's very important that we operate from need rather than want, because trying to negotiate from want means one wins, one loses. The one that loses often is the one that doesn't have power.*

*Can't versus won't. We've talked about this with a three legged stool. So when an employee says, Hey, I can't do that, the question is can you not or do you not want to? If it's a can't, then I can train you. But if it's a won't, then it's a will problem, and we'll discuss will problems in module four.*

*Intent versus impact. This is important for the people in your workshop because they are managers, most of them, and they could say something like this. Yeah, I told you that honest feedback because I thought it would be good for you. Well, that was your intent, but the impact meant that it discouraged me.*

*On that note of discouragement, the last one here, hurt or injured, this is something that comes from the world of sports. I remember when my son was playing tackle football as a youth. The coach would always ask the kids if they were down on the field, are you hurt or are you injured? Now the way it breaks out is this way, if you're hurt, you can still play, but if you're injured, the injury must be fixed. Now what this has to do with where we are now, dealing with managers, is that let's just say that a manager has an employee that is up for promotion and doesn't get it. When they find out what was the reason they were not selected versus another, they might find that the person that was selected had a certificate, a certification, that was necessary. Well, the person that didn't get the promotion is going to be angry. They will be hurt.*

*Now the thing is, they have to realize that, in a sense, they're injured too. They will not promote until they get that certification. A person may not get promoted until they get a degree. So, if you are hurt, fine, get over it. But if you're injured, do something to fix the problem. So if you have people in the class who are managers, let them know they have a responsibility to be honest and direct with people who are not getting promoted or not getting selected for different assignments. If they're doing something that is technically an injury, something that must be attended to, they have to do it, they have to fix it, and the manager should be the one that finds the resources. So these are just some common statements and questions that I believe will make for a more productive conversation.*

**Points to Cover:**

These six pairs of choice are to be used in feedback and coaching sessions. They are covered in depth in the video.

*Now that takes us into the next section on delegation, and we start delegation by asking a very important question. This is going to be in the workbook, and so you can ask the group, if I'm going to take my basement and change it into a state of the art home theater with all the finest equipment, what's the first order of business? Then they'll start giving you step. Well, you need to get a contractor. Oh, you need to look at your budget, and you say, yeah, that's important, but not the most important, and if they don't get it, then finally say, here is the most important thing. This needs to be done first and show them this next slide.*

**Points to Cover:**

**DO NOT SHOW THIS SLIDE YET!!!!**

This starts off the section on delegation. Ask the group:

If I wanted to turn my basement into a state-of-the-art home theater, what would be the first thing I would need to do?

Get their input. The correct answer is: CLEAN OUT THE CLUTTER.

If they don't get it, then show them this slide. If they do get the right answer, show the slide then.

Ask them:

For how many of you, does this messy basement look a lot like your daily task list?

Let them know that until they clean that junk out, they can't possibly grow as The Boss.

Page 62

Delegation

- Benefits
- Barriers
- Process
- Plan

*The answer is if I'm going to turn my basement into a state of the art home theater, I have to clean out all the junk, and so people will laugh, and then ask them, how many of you, honestly, when you look at your daily agenda, it looks like this? You've got so much crap going on. There's no possible way you could ever develop into a better boss. There's no possible way you could take what we learn in this program and be a better boss.*

*The key is that we have to learn how to clear the clutter out, and the tool that we use for that as the tool of delegation. Now on page 62, there's some places where they can take notes and so maybe you can walk them through. Some of the typical benefits of delegation is that I can accomplish more. I may have more flexibility to take on new challenges. It's an opportunity to develop other people. It's a way that I can manage remote sites, I can delegate tasks. So there are some real benefits to it.*

**Points to Cover:**

These are some benefits of delegation.  The video outlines the talking points.

After you've gone through them, ask the group:

How many of you see a benefit to delegation?

All hands will go up.

Then ask:

How many of you still struggle then with delegating?

Many hands will go up.   This is your lead-in to the next activity.

Page 63

# Delegation Excuses

ACTIVITY #9

*Then we're going to talk about the barriers to delegation. There's an activity for that, and then we'll go through the process and the plan, but get the group excited about delegation and let them know, hey, it's something important to do. Then, of course, then ask them, say, how many of you think, at least in theory, delegation's a good idea? Most everybody puts up their hand. Then you say, well, let's talk about why it's not getting done, and that leads us into this activity, number nine, on delegation excuses.*

*So in your instructor guide, you'll see there's a little grid. What I'd ask you to do is put this up on a flip chart or a whiteboard, and on one set of the columns you're going to label it, reasons or excuses. In the small one is, valid with a question mark. So what we do is we just have the group brainstorm, and just say, okay, what are some reasons why you're not comfortable delegating, and just write them down. People will give you the standard ones are, it takes longer to train somebody. They won't do it as well as me. My boss says I can't delegate. The customer doesn't want it to be delegated to, I mean there's a host of those. So write them all down.*

*Get as many as you can, and then tell them, we're going to go through these one by one, and then what's going to happen is, as we go through it, if you agree that it's a valid reason not to delegate, I'll put a little Y in the valid column. Right? So you put a Y if it's a valid reason, if it's not, I'll put an N for no, and you'll decide. The audience decides, not me as the facilitator, and at the end of this activity, if there are more Y's than N's, then I'm going to have you tear out this section of your workbook and tell you don't ever delegate it. But if we get more N's than Y's, then you have to promise me by next week you're going to delegate one task.*

*So now this is where you'll have to use some of your experience. So some of the common excuses are, it takes longer to train somebody, and you say, yeah, I understand. But if I was to invest 15 minutes to train someone, how much time would I save on the other end? So the question is, is it valid? The answers probably not.*

*They can't do it as well as I can. Really? Have you ever taken on a task where you did it, and you thought, wow, who in the world had this before me? They totally screwed it up. So just remember, somebody may be able to do it better than you. You've done that in your past, and just let them input. They will come up with sometimes reasons why their own excuses are invalid. I have never had this happen where people have more excuses that are valid than not. But if it happens, just say, okay fine. I refuse to have you delegate. Believe me, they'll say, no, no, we really need to. Once you get that commitment, then tell them, let's talk about how to do it right.*

*So there's the process and the process is pretty simple. There's a little more narrative in the workbook form, but you analyze the tasks. Select the person, assign it, and then have them do the task and then conduct feedback. Well, if they lose this contest and have to delegate something within a week, then we would go to the worksheet, I think it's on page 65, and there's a delegation worksheet. That's a really valuable one. There's also a copy of this in the resource tab where they can print this out, but talk them through how to do this.*

*So we identify the task, whatever it is, and then we have to determine the degree of urgency and the degree of importance. Now my recommendation is, it should be something that is pretty low on urgency but high in importance, and also it could be something that you don't think is important but to somebody who wants the task to really develop, it might be very important for them.*

*Then number four is pretty challenging. You have to determine the outcome, not so much the process, but you say at the end of the task, it needs to look this way, and then find the person. Now when you find the person, you got to determine, is this the best person for the job or the person for whom it could be developmental? Be careful to always select the best person for the job because there's a good chance that person is probably overwhelmed and overworked, and the person for whom it can be developmental could be somebody you wouldn't consider because maybe there are a couple years from retirement. But it could be something that's tied to something they want to do when they start their second career. Once it's done, identify what training's necessary and then you would assign the task.*

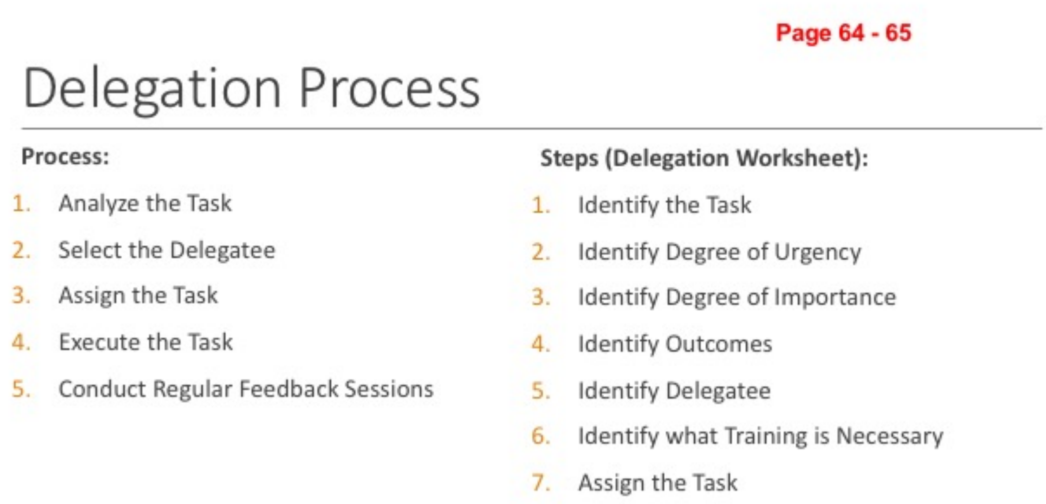
*The key here is to let them know that they will never progress professionally if they don't have the capacity. The one way that they can create the capacity is to delegate the tasks down so that they can take on new tasks to help them develop. So that's delegation, which leaves us with just one more thing that we talk about in this very long module.*

**Points to Cover:**

Draw the diagram below on a flipchart.  The video will show you how to run the activity.

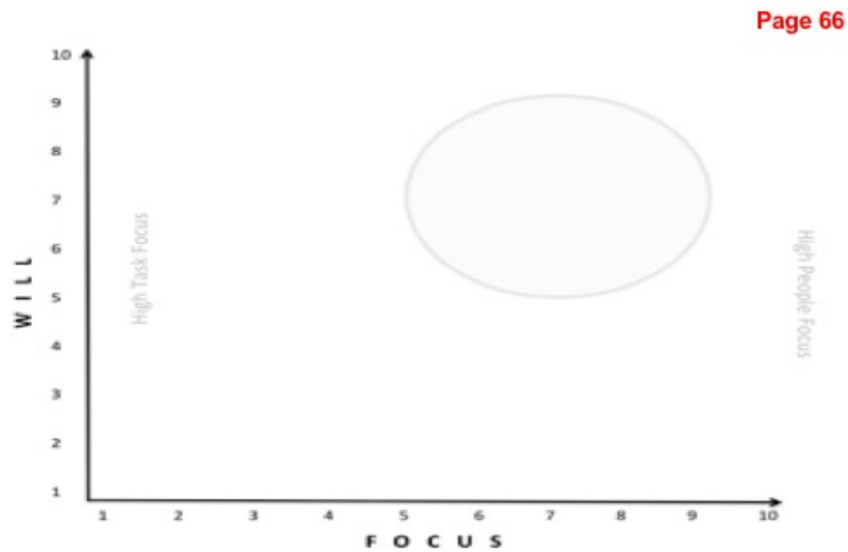
| Delegation Excuse | Valid? |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

| | |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |




**Points to Cover:**

This slide mirrors the high points of pages 64-65. Make sure they commit to delegating at least one task in the next week.



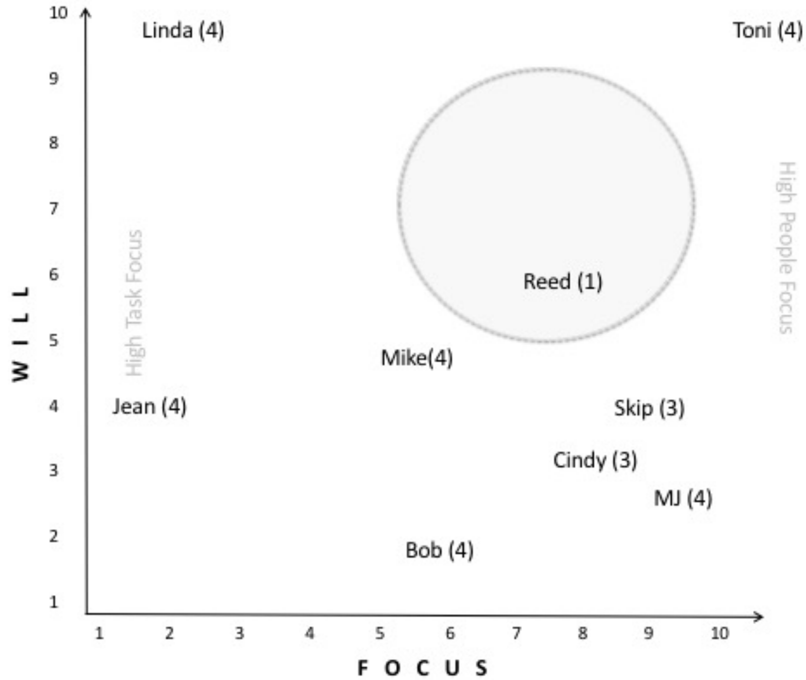

*This module very well could take an entire day if you did it end to end. But we want to talk about how to develop teams. So we're going to use the same three legged stool methodology here, but the way we measure skill, will, and focus on a team is very different. So in the book, on page 66 through 68, you'll see a copy of this, and then also you'll find that there is a grid that you can actually have them do. You could have them do it in class or take it away for homework or do it some other time. But what we'll do is I'll explain how this works and then I'll go through the little case study that you have.*

*So the first thing we want to do when we start monitoring team performance is we want to talk about the will, and so we measure will by how involved somebody is in team activities. We do that individually and then we look at the collective of the group, and you'll see this in the case study. One, two and three means a person is just not involved whatsoever, and then, eight, nine, 10 is that they're overly involved. Think about a ball hog on a sports team. Just they're too involved. The right place is six and seven. Then, the next thing we want to look at is focus. So one, two, and three is high task focused, and then nine and 10 is high people focus. Now the challenge here is if somebody is high task focus, they're probably not really friendly to the other people, and if they're high people focus, they may not really be involved too much in the task. So the idea would probably be a six and seven.*

*The last thing we measure, like the three legged stool, is a level of skill. So we would designate a skilled person by levels one through four. Somebody who's level four is highly skilled, three is somewhat skilled, two is less skilled, one is brand new. So the perfect fit then, if we were to be honest here, is that we would have our old team in the middle of this circle here with a number four by their initials. Now what does that look like? Well, that's when we do our little case study, and so, as I'm going through the case study, take some notes here, because you can make some other points here that I think are really important.*

**Points to Cover:**

This opens up the section on developing teams.  The video explains how to demonstrate this team health model.  This is a good reminder of how the SKILL, WILL, and FOCUS work.




*This is an organization, there's a little story that goes with this. So the first question that you would ask your audience is, number one, is this a synergistic team? People will say no, and then ask them, do you even know what synergy means? A lot of them will say, well, it means we work together. So yeah, it's like a sequoia tree. Sequoia trees can grow over 300 feet in length, but they only have four feet of root. So the reason they stand is that they are in groves with other sequoias. The roots go down four feet, but then what they do is they come together and they interlock with the other roots. So they become dependent on the other trees. That's what synergy is. So if that's our definition, how synergistic is the team? Of course, the answer is no.*

*Then ask the group, do you think there'll be any conflict on this team? They'll say, yeah, and say, well, who will it be between? Well, the typical answers are Linda and Tony, which is true, Linda and MJ, because Linda's highly skilled and task focused. MJ is on the people side and not very involved. Then ask them, where would you find alliances and coalitions? They'll say, well, Skip, Cindy, and MJ. You say, yeah, because they're low will, but they're high people focused so they're there for the party. Now some will say Linda and Jean, and then you can say, well, let's talk about that.*

*Linda and Jean are both task focused. They're both highly skilled, but Linda is probably going to be mad at Jean all the time for not pulling her share of the weight. Then the next question is who is going to get the blame for things on the team? That's going to be Bob because, you see, Bob is in the middle, down at the bottom, and unfortunately, just like we looked at earlier in module two, in the absence of information, people fill in the blank. So we're going to blame Bob for everything, and then ask them, what could be done to make this team more synergistic? People will say, well maybe some training. You say, well, everybody's pretty highly skilled. Would training really work? Well, how about team building? We could do ropes courses, and say, well, those are fine, but unfortunately what they don't do is address the real issues of a team. Yeah, we can have fun and do activities, go cart racing or miniature golf or whatnot, but we get back to work the same problem's will be there.*

*The only way we can fix this team is to work with the individuals using the three legged stool, great performance, and those feedback and coaching tools. That's how we get people pushed to the middle. But if* *we don't bother to do that, this team is going to be out of control. So there's a little story that goes along with this, is that Tony is the leader of this team and Tony thinks things are going pretty well. Linda on the other hand does not, and so Linda's constantly picking on Bob because, remember, Bob gets the blame for everything. Well, Bob finally goes to Tony and says, Hey Tony, can you tell Linda to lay off, because I'm getting tired of being singled out all the time? Tony goes to Linda and says, leave Bob alone. Linda says, Well, if you're not going to step up, I'm going to have to because Bob is not a good player.*

*Well, Linda eventually fires Bob. So Bob goes to Tony and says, Tony, since when can Linda fire? Tony says, Well, Linda can't. So Tony confronts Linda, and says, what are you doing? Linda says, Tony, if you're not going to lead this team, because by the way, Tony's a team leader, then I'm going to have to take charge. Well, Tony gets mad and says, Linda, we can't have that. I'm going to put you on performance plan, and you need to go to some training.*

*Now the question is, is training going to fix Linda? The answer is of course not, because she has high skill. So Tony sends her for a week long program where you go on site in the daytime, you go to classes at night, you sit around the camp fire and talk about your feelings. Well, as you can imagine, that does not work for Linda. She leaves after one day, comes back, Tony says, what are you doing here? Linda says, I'm not going back. That was dumb.*

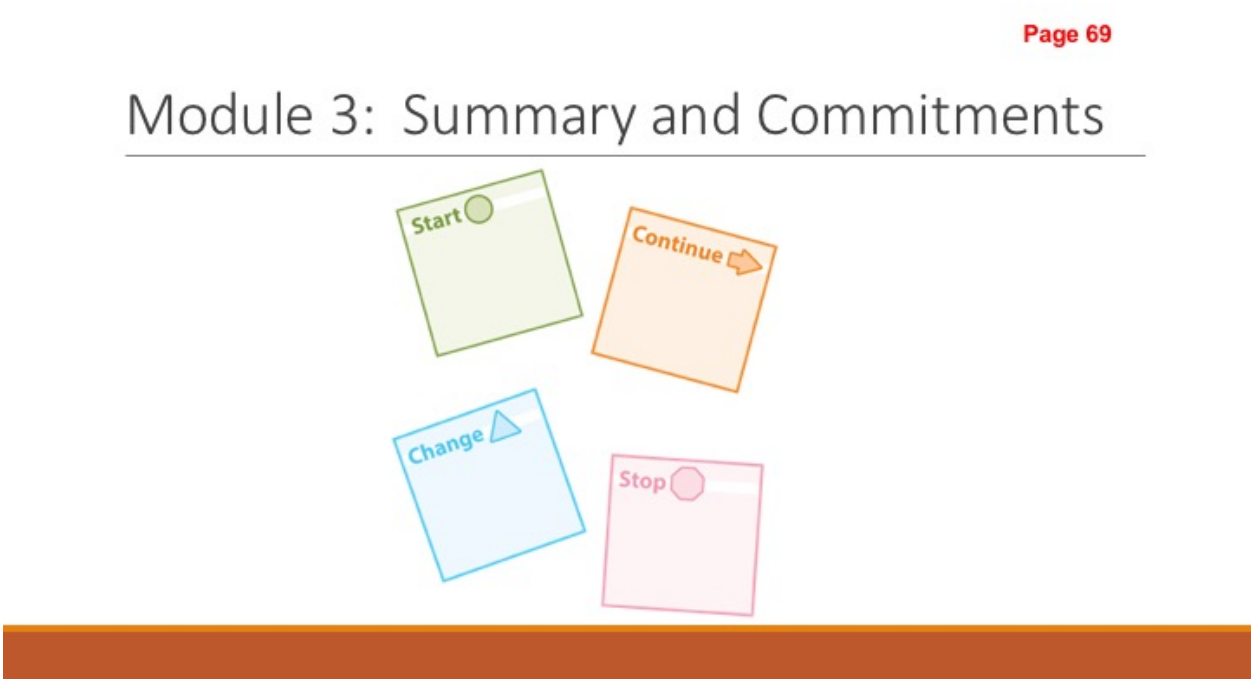
*So Tony fires Linda. Well, Linda goes to the board and complains and says, Hey, Tony fired me. I'm the strongest person on the team. The board goes to Tony and says, you need to hire Linda back. Tony says, No, she's divisive. The board tells Tony, if you don't hire a Linda back then you leave us no choice, we're going to fire you. So they fire Tony. That means Linda gets promoted to team leader, and over the next year, every one of the people on the team quit. At the end of the year, the executive team and the board realized they made a big mistake and they fire Linda. Of course, no one lives happily ever after in the story.*

*The reason we do this is that it's important to let people in your audience know they have to take an active role in developing the team. So that tool that's in their workbook will enable them to do that, and so what they do with the tool is they just put the initials across the top and then they pick whatever statement, checking the box that tends to fit best, and what that'll do is that will end up plotting their team. Remember, the goal of course is that we want to have everybody in the circle. We want to make sure that everybody is in the sweet spot right here. The good news is, if you have this, you can plot the team members. A lot may fall outside of the sweet spot. This gives you an opportunity as a manager to sit down on a one-on-one and say, listen, let me show you where you are in terms of team success and where team success is. The team success is here, I have you down here.*

*Let the audience know that they should never share the entire team map with their team, because then everybody's going to get upset or jealous, but it's a good one on one coaching tool that you can use. The only way to build a team is to handle the individuals individually and work with them. That will help them be more cohesive. You do that, there's a good chance you can develop the team.*

**Points to Cover:**

This is the case study.  Details are in the video.  The key point to make is that team health issues need to be addressed early as small problems can impact everyone.  The Team Health tool is in the workbook and they can begin using it when they get back to work.




*That brings us to the end of a very long module and so, like the other ones, we wanted to end with a summary of commitments. So what are some things based on the module that you are going to start doing? I'm going to start having regular conversations with a team. I'm going to start using the soap tool. What will you continue doing? Well, I've already been doing this so I'll keep it up. What will I change? Well, I have found myself giving a lot more praise and less swearing. I'm going to change that. What will I stop doing? Well, whatever that is.*

*Summary of commitments. Again, if you write it down, there's a good chance that you will hold to it. So that winds down module three, the longest probably in the entire program, but I think the one that has the most value. From here on forward, we talk about motivation and then a lot of tools that will help that first part of the triangle where it's fix systems and processes. There's a lot of good tools for that, so we'll pick that up in the next video.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 71

# Engaging Employees

MODULE 4

*Welcome to module four. Module four is called Engaging Employees. It's really all about motivation. It is one of the smaller modules, believe it or not, in this program and the highlight of the module is when we do to the force field analysis activity at the very end. But what we want to do with this one is really focus on the will leg of our three legged stool of great performance. A way that I like to open up this module is to ask the group, I know this sounds kind of silly, but you'll get it when I show you, ask the group how many have tattoos? Depending on the age of your group, you may find there's a bunch of people that have it and then you can talk about ... Then what I like to do is I ask, and you can do this to say, would anybody be willing to share what tattoo they have?*

*Now you don't have to show it to us, but tell us about it. That's very important because what you're going to find is some people say, "Yeah, I got this when I was in the navy and I just was partying with my friends." But you'll find more people will say things like this, "I have my son's name tattooed on my arm, I have a picture of this and it represents this." You'll find that more people have tattoos that have some sort of deep meaning.*

*So go around the room if people are willing, ask them about it. It's really kind of cool to watch and then ask them, how many of you know someone who's had a tattoo removed? Of course they'll usually be one or two people and they'll say things like, "It was very painful with lasers," or "It was very expensive."*
*Then you would say this, "All right, so for the most part, tattoos are permanent. Would you agree?" They'll say yes and then say, "Well tell me what you think of this."*

**Points to Cover:**

This is a short module that focuses on motivation.  Engagement is a term that is used in organizations now but it's premise is that motivated employees will be more dedicated, or engaged.

Start this module out by asking the group how many have tattoos? Ask those who raise their hand if they would be willing to share (not show) what they have... and why. Most will have something that is meaningful and significant.

Ask them if tattoos are permanent. The answer of course is no, they can be laser removed but expensive and painful. So that means that in a way, they are permanent.

Then, ask them what they think of the next slide **(AND NOW SHOW THE SLIDE)**


*This is the next slide. Now this is actually from one of the customers we work with, Pratt & Whitney and I found this online. So this is their logo, the Dependable Engines logo. Now the thing that you would ask, and just so you could set it up and say, "Well, if tattoos are the kinds of things that are permanent, what are your thoughts about this? This is one of the companies that Boss Builders, the authors of this program has worked for." People will say, "Wow, that's really impressive." Then you could say, "What would it be like for this person if they went to the company picnic if they worked for, say, Rolls-Royce or GE?" Those are competitors by the way.*

*Of course they'll say, "Well you couldn't do that." So then you would ask, "Is it safe to assume that this person is engaged?" The answer, of course is yes. Now this is what's really cool about this picture. This is not actually an employee who worked at Pratt & Whitney. This was the son of an employee who worked there his entire life and when that person died, his son did this tattoo as a tribute to his father.*

*So you can ask the group, "Do you think that this man came home from work everyday saying, 'Oh, I hate this place, this is terrible.' " No, he probably came home and said, "I love it there. This is a great place to work." In fact, as a side note, I talked to some of the HR people there from Pratt Whitney a few years ago and they told me that there was one employee who in his will, wanted a chrome Dependable Engines logo embedded in his tombstone.*

**Points to Cover:**

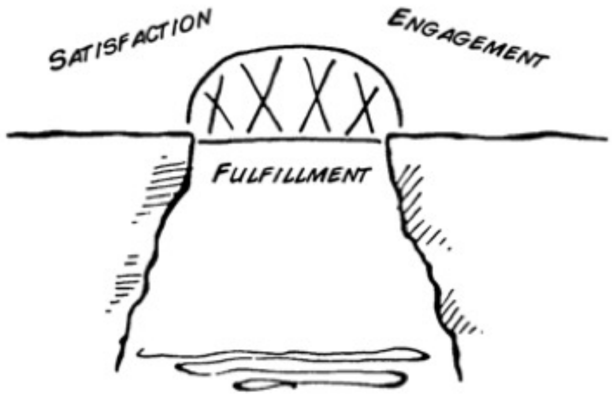
This tattoo is the logo of one of Boss Builder's clients.

Ask the group if they think this employee is engaged.  Answer is yes.

Then let them know that this person didn't actually work at Pratt & Whitney.  This is the son of a worker which was done in a tribute to his dad when he passed away.  Ask the group if that man talked positively about his job. As a side note, there is a Pratt employee who, as a request in his will, had a chromed Dependable Engines logo embedded in his tombstone.

That is one example of ENGAGEMENT.

Page 72




*So where we're going with this is engagement is a measure of commitment. Now we can look at it a couple of different ways, but I like to look at it using this model here. Now this is in the book and it's on the slide and it's a model called the bridge to engagement. Now, there's really two conditions that we look at. The first one, of course is satisfaction. Satisfaction, I guess the best way to say it is that you know, my life doesn't suck. It's not amazing, it's not incredible. It just doesn't suck and that's fine. That's how a lot of people see their job. That's how a lot of people see their career. It's a means to an end but then we have this other condition that we call engagement.*

*One example that I give and you know, you can use something very similar to this or, or you could even use my story if you want. Years ago, my brother-in-law at the time, my first marriage was engaged and he was going to marry this woman and we really didn't like her. I remember the night before he got married, his best man and I, we took him out for his bachelor party and he was really nervous and he said he was thinking he made a big mistake. So we talked to him and he says, "I think I'm making a mistake. What do you guys think?" So I told him, I said, "Well I think you are too." Of course he got mad, but I told him, I says, "It's not too late." He says, "Oh it's too late because we opened the gifts already and we've got the honeymoon planned," and it was a big wedding and a big production.*

*So he ended up talking himself off the ledge and the next day was the wedding and it was a beautiful wedding and it lasted about 14 months and then it was over. So what I do is I ask the group, and you can do this to ask them, how many of you know somebody who's been divorced? Of course a lot of hands go up and then say, "How many of you know a couple who called off an engagement at the 11th hour?" Usually you'll find one or two, but not very many. Sometimes you won't find that at all. So here's the point to make with engagement. Think about employee engagement the way you think about a couple who's getting engaged. The engagement is kind of a crazy commitment because some couples know full well going into it, it's not going to work.*

*This was definitely the case with my brother-in-law at the time. He did not think it was going to work and yet he went through anyway. So that's the type of thing that we talk about with employee engagement. It means* *that you're all in, just like the guy with the Pratt & Whitney tattoo on his arm. He is all in even if he doesn't work there, that's a tribute to his dad. Then ask the group, "What would life be like if people were truly engaged like that here at this company?" Most of the time they'll say it would be great. People would do the extra things, they would go the extra mile, they would their job and then look for something else to do. See, That's what we want to figure out is, how do we go from satisfaction where things just simply don't suck, to this crazy commitment of engagement?*

*Well, it's done by crossing what we call the bridge of fulfillment. The bridge of fulfillment, it means that us as the boss, we need to work to create the kind of conditions where maybe even employees, if they won the lottery, they'd still want to work there almost for free. We do that by taking an active interest in what's important to them and an active interest in their development. Now, we saw some of that in module three, but we want to talk about what drives and motivates now, here in module four.*

**Points to Cover:**

This is a good model to draw on a flipchart.  It shows two conditions:  Satisfaction and engagement.

Use the example of engagement between two couples getting married.  Often, they know the marriage won't work but they go through with it anyway.  That's one way to think about employee engagement:  They are "All in"

Then, let them know that crossing the Bridge of Fulfillment leads to engagement.  We discuss fulfillment in the next slides.


Page 73

*To do that, we're going to use this model. This is a model, it's a wheel of motivational drivers. Now, this is not by any means a comprehensive list of drivers, but these are some of the most common. So the way to teach this model is to start in the middle and say that we define motivation as something that happens when a person gets what it is they need, when they need it.*

*So think about being on a long drive and having to use the bathroom. That's a pretty crazy example, but it works, right? The further you get into the journey and have to stop, the more you can't focus anymore, but if we pull over to a rest stop, take care of business, you feel great. You got what you needed, when you needed it. Motivation is all of that. It's up to us as the boss to figure out what drives a person and how can we make sure they get it so that they'll be motivated?*

*Now we do start with this inner ring. This is what we call the basic human needs. So these are very similar to what you find in Maslow and Alderfer and some of those theorists, but most people that are in your workshops aren't going to be interested in a bunch of theory.*

*So here's what you could tell them. If you come to work after you've had a fight with your partner, if you come to work after realizing you don't have enough money to pay your bills, if you come to work and realize that maybe your in-laws are moving in with you, you will not be on your game when it comes to work. So as the boss, it is not your responsibility to be somebody's personal bank, or financial advisor, or marriage counselor but it is important that you get them the resources. If your company has an employee assistance program and EAP, let your audience know that that's exactly where this plugs in. If somebody says, "I'm having issues outside of work," and it's impacting the work, that is a protect the house issue, it's important that you tell them, "Listen, I need you to take care of that business at home because I need you here and we need you on your game here at work."*

*So if there is resources that will help, get them those resources, but beyond that you have a lot of other ... I need you here and we need you on your game here at work. So if there is resources that will help, get them* *those resources but beyond that you have a of other options. So what I'll do is I'll walk you through what these drivers mean and then I would encourage you to think about some personal examples that you could use to really express it.*

*So we start at the one o'clock position here with the need for clarity. Now, there are some people who come to work and they simply want to come to work, do their job and go home and that's it and you have to let the group know there's nothing wrong with that, but there are also individuals who take a great deal of pride in what they do and how it contributes to the big picture, that's the need for clarity.*

*So you may have people that feel like they're just in a production job and they want to see what the bigger picture is. It's very important that you identify that and try to get them aligned with that, otherwise they're probably going to quit. That's the need for clarity. Again, these are ... not everybody has all of these maybe you have one or two, but the other thing to do is you're talking through this model is to ask the group to figure out what it is for them as you explain it and then maybe think about that one direct report that just is really frustrating to deal with and see if you might be able to pin it down there.*

*Second one is the need for legacy. Now this one is important, particularly if your organization has employees who've been there for a very long time. So going back, for example to Pratt & Whitney, there are some people there ... I was there once and one of my people in the workshop had to leave because one of his guys had an anniversary party. He had been at Pratt & Whitney for 50 years. Now, you take a person who's been around for 50 years, the chance that they are running full speed toward the finish line is fairly slim. So what we want to do is appeal to legacy, to motivate him, say "When you will retire from here, how do you want to be remembered?" A lot of times they'll [inaudible 00:10:36] off and say, "I really don't care," but I believe they do. So if you are dealing with more tenured and experienced workforce that may be looking at the finish line, ask them, "What do you want to do in your next career? How do you want to be remembered here?"*

*Third driver is the need for power. It simply means they're motivated when they're in charge and there's nothing wrong with this. You could use examples of politicians who used to be business owners, who now are running for office. They don't do it for the money, they do it because they want to have control. If you have an individual with a need for power, think about them down the line for a position in management. For some, it's competence and we saw this a little bit earlier with those behavior styles. This would be probably your spiders, right? They just want to work in an environment where they are seen as being really smart and their contributions are valued for that.*

*For some it's respect. Respect sums up a lot of these. We defined respect, and we saw this earlier, as I am being taken seriously. When a person feels like their idea and opinion is not looked at, if people don't take them seriously, they get demotivated. Some people, this is a big deal for them. For some it's money and there's nothing wrong with money as a motivational driver, just realize that this is one of many, and there may be a season in life where this is job number one, but don't assume that everybody's motivated by it because if you do and you can't afford to give them raises, then you feel like you have no tools. So don't discount money as a motivator, but don't make it the most important thing.*

*Think about job satisfaction as another one. This answers the question of why some people who win the lottery decide to stay at work, because they love their job, they enjoy it. So job satisfaction is a motivational driver. Frankly, if you need money, you may not like your job but you stay in there behind. On the other hand, you could get to the point where your work becomes just synonymous with you. That's where job satisfaction is a big part of it. Then for some it's pain avoidance, right? I do it because of I don't, there's a consequence. So a lot* *of managers think it's money and pain avoidance. There is more than that as you can see. Not the best motivational driver, but it is a driver.*

*For some it's inclusion, and we saw this a little bit earlier too, is sharks. I want to feel like I'm part of something big. I want to feel like my contribution matters. I want to feel part of the team. We see this a lot and you can bring this up too when you hire veterans from the military. Even if they didn't care much for the military, and this was my case, I didn't care much for it at all, but I did miss belonging to something important. So if you are hiring veterans, as quick as possible, make sure they feel like they're part of the team. This goes for any new hire for that matter.*

*For some, it's a personality alignment. We looked at a lot of this in module two and so you can imagine that some of those behavior patterns, there's positions and there are fields that align much better. So maybe this is it. For example, you have a preference for introversion, which means you're energized by being alone and away from a lot of people. If you work as a greeter at Walmart, let's say, that would probably be a personality misalignment and it might be frustrating for you.*

*For some it's appreciation, a simple thank you. Others, it's predictability, they're motivated when every day is just like the day before. Now I'm guessing in your organization, that's probably not the case and so you might have to let them know, "Listen, this may not be the best fit because pretty much things change on a regular basis and maybe even an hourly basis here."*

*For some it's equity. I want to feel like I'm being treated fairly and that's a very subjective measurement, but for some people that's fine. Even if they're treated badly, they just want to make sure that it's fair. The last one is core values. Now we looked at this quite a bit in module three on the focus factors and so this is the other disconnect. If you have personal values that do not align with your organization's values, there's going to be a real problem in performance and if that's not fixed, it is definitely a will problem.*

*So when we look at motivation and we look at will, there's a lot of different ways you can look at it. This is primarily that third of the middle leg of the three legged stool. You have options here, right? For some people they need a hard approach, I say that's like a State Trooper. The other extreme is a mall cop, someone with a softer approach. So as a manager who's managing people, if you're looking at will problems, these are drivers but I would say that some of these might require sort of that State Trooper approach and other are the mall cop like the inner ring could be that.*

*So you can let the group know there's many more than this, but this is enough to get you started. This is something, if you want to take a copy of this and sit down with your direct reports and one-on-ones, you could say, "Here's some options. Which one is like you? I mean, it helps me understand how to motivate you."*

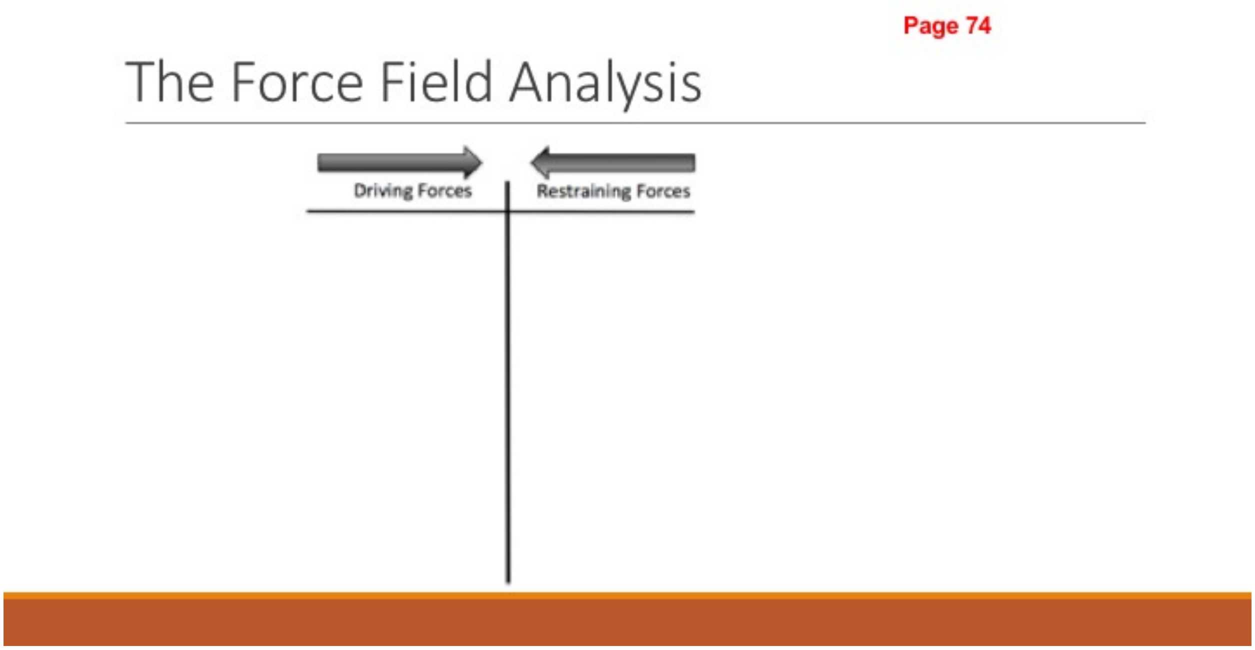
*Well that takes us ... and that's the big part, by the way, of crossing that bridge of fulfillment. When I understand what motivates you and I can do that, it'll help you get it done. When you get what you need, when you need it, you're motivated.*

**Points to Cover:**

These are a depiction of motivational drivers. Start in the middle with the definition. As The Boss, a big responsibility is to make sure people get WHAT they need, WHEN they need it.

The basic human needs should be addressed through Employee Assistance.

The drivers are explained in the video.  Use personal examples if you have them.




*Well, that brings us then to the tool that we're going to learn. Now, this is going to be the first of many tools from here on out in this program, but this one here is called the force field analysis and we're going to learn it for two purposes. Number one, because it's a great management tool, but secondly it's going to be very relevant now because an activity that I'm going to have you do with your group, especially if this is all from the same company, is that we want them to get to identify what would engagement look like? So the way a force field analysis tool works, and this by the way is one that I would strongly encourage you to use a whiteboard or a flip chart for.*

*You can start by saying that there's really two things that would drive us. Now you can use whatever example that you want. I always use the example of myself trying to get healthy. I've got lots of stories that I tell, and this is a common one, but several years ago, my wife was on my case to get healthy. I kind of looked at it and I thought, well, there's a number of good reasons for me to get healthy. So what I did is I ... and I did this in a group, I just list them out under driving forces. I would look better, I would feel better, I'd save on medical costs, I wouldn't have to buy more clothes. There's a host of reasons. Then I always tell them that after a year had passed, I realized that I hadn't done any of those. The thing is, is I knew that it was good for me, but what I needed is to figure out why I wasn't doing it.*

*That's what happens in this other column, which is restraining forces. So what you have to do with that is ask yourself, what is preventing me from doing this amazing thing? What's holding me back from being healthy? I already know why I should do it. That's the driving forces, what are those restraining forces? So in the groups that I work with, I always list them. I travel a lot. I don't like to diet. I don't always have an opportunity or time to exercise, I'm tired. I mean, there's a host of excuses. So then I ask the group, and this for you to ask your group, if I'm going to make a change, where would I need to start? The answer of course, is in the restraining forces.*

*So that's when I get ready to do this next activity. So what I would encourage you to do, and depends on the size of the group, try to get people and maybe groups of seven or eight. So if you have a group of 25, you might* *have four groups of people. If possible, if you can have four flip charts around the room, that's even better but if you can't, have them do it on a sheet of paper and tell them that you're going to give them 15 minutes to put together a force field analysis for engagement at your organization.*

*So what they do is list out what would happen if we had that kind of engagement where people would get tattoos of the company logo, the same kind of engagement that makes a person who knows that a marriage is not going to work out go ahead and get married anyway. What would happen? Let them go to town on this one and then tell them, after you're done with your list of driving forces, ask yourselves and make a list of what's holding us back. What are those restraining forces?*

*Let them do this, so give usually 15 minutes, but at the 10 minute mark, let them know, "Hey, we're almost done. If you have your list of restraining forces, here's part two of the activity. I want you to rank order them like the top three. So list your third biggest, your second biggest, and the number one biggest restraining force, circle that. So in five minutes when we get back together, I'm going to have you read the group just your list of restraining forces and and then tell us what is number three, what is number two and what is number one, the biggest one of all."*

*This is important, I have this because you're going to use this information in the next two modules as we learned some tools. So we got to do this at all builds in, if you're doing this workshop and you're doing it in segments, it really would help if you could have the same cohort together just so they can continue to work through this process. You may find, aside from the training that you get from this program, you may actually be able to use some of this stuff as you are kind of looking at your culture.*

*So as you're letting them work, you can walk around and then let them know, "Okay, it's time to select your top three, three, two, and one." Then when everybody's done, you stop and have somebody from each flip chart go ahead and just read the restraining forces. Then say, "Here's number three, here's two and here's one. The most important one is this." Have them circle it. Now after you've done that, the next thing to do is to say, "All right, if now we want to move from that, let's figure out what are some things that we can actually do with that number one biggest restraining force?" Let them know we will learn how to do that in the next module and that's the tool of brainstorming, but we'll get to that in the next module when we start using tools. What we want them to do is to realize, when you want to make a change, don't look at why it's so important, look at what's holding you back.*

**Points to Cover:**

This is the first of many tools you'll be using in the coming modules. The video explains how to debrief it. Then, you'll do an exercise with the group.

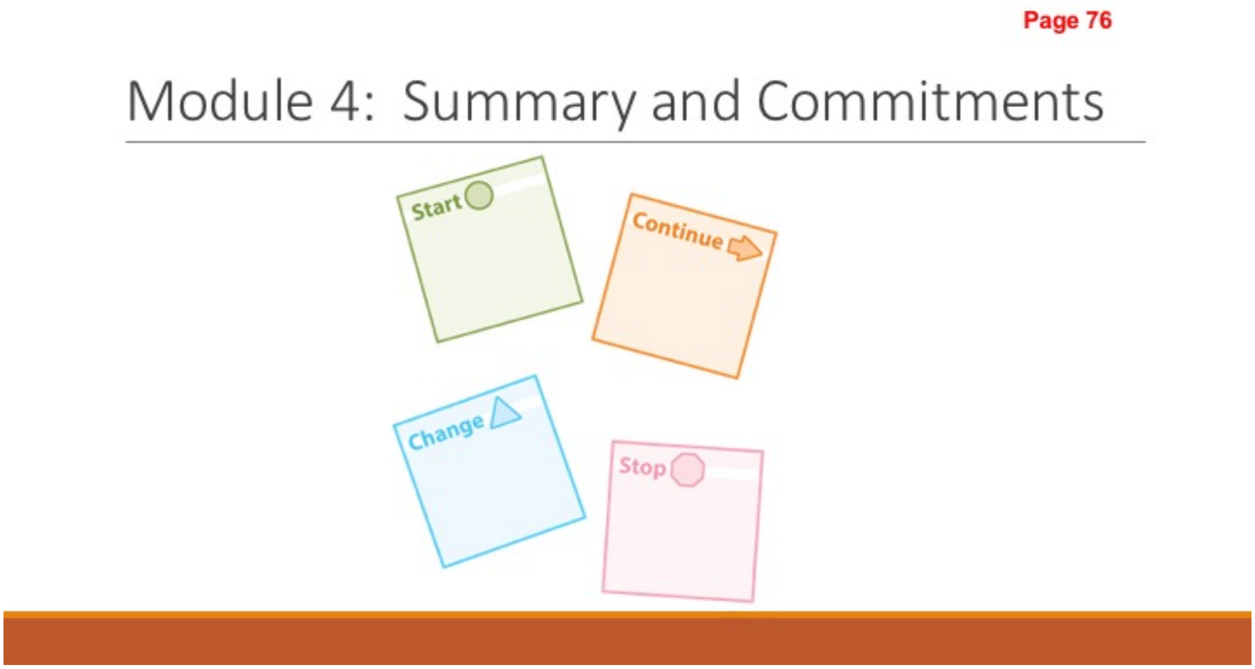
Page 75

# Analyze Engagement

ACTIVITY #10

**Points to Cover:**

The video explains how to run the activity. Be sure to have the group circle the Number ONE biggest restraining force to engagement. They will be working with that in Modules 5 and 6.




*Now you can see that we're inching away from sort of the developing of people now into fixing systems and processes, from that triangle that we looked at back in the introduction. So that should take us to the end of module four. Remember I said it's a pretty short module, the highlight is definitely going to be that activity and in the end, keep those flip charts there because when we hit module five, we're going to revisit that information.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 77

# Improving Systems and Processes

MODULE 5

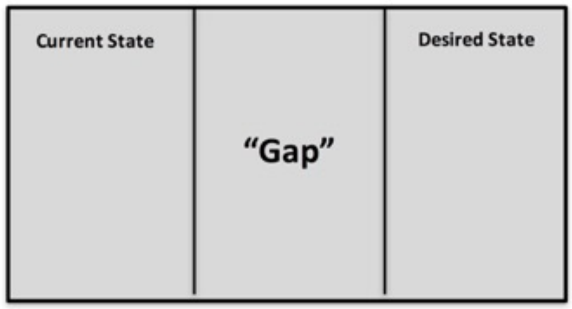
*The module five, module five is improving systems and processes. From here on out, you're going to get a lot of tools, a lot of diagrams, a lot of little charts and things that are going to be very beneficial. To be perfectly honest, it's going to be a lot easier to teach the rest of this program, because you're basically walking them through different models. There's a fair amount of activities involved, especially in this module and the next. And I think that that's going to be something that your audience is really going to appreciate.*
*Well, again, if we go back to that triangle, the triangle that says the great boss fixes systems and processes, protects the house, and develops people, we really are going to spend a great deal of time on that improving systems and processes down at the bottom.*

**Points to Cover:**

This module references "Fixing Systems and Processes" from the Great Boss Triangle model from Module 1. You'll see more of this too in Module 6.

Page 78

## The Gap Analysis




*So let's begin by a look at some of the tools that we're going to look at. The first one is a simple one, it's called the gap analysis.*

*You don't really have to do a whole with this particular slide. Just let them know that if you're not specific about what the improvement needs to be, you may had picked the wrong solution. So the way this model works is that you look at your desired state, and remember, this could almost kind of be back to our definition of conflict. Remember, conflict happens when what I'm experiencing is not what I want. What I want is not what I'm currently experiencing. You can bring that back as you talk about this.*

*Rather than complain about the way things are, begin with the desired state. This is what I'm looking for. In our department, I want the process to work exactly like this. So, what is the current state? So we hold them up like this, here's the desired state, here's the current state. In-between, there lacks a gap. So our job, just like in the force field analysis now is that we have to figure out what's holding us back from being successful. So this is a tool that helps us, right. The desired state is this, here's where we are right here. What are the things that need to be done to improve that process in the middle.*

*Once you've made a list of those, you can use some of the other tools we're going to look at in this module and next to help you actually get through that. But again, what the gap analysis does is it lets us know here are the things that have to be done for us to get from where we are to where we need to be. Okay, so this might take you all of five to 10 minutes to explain. Don't worry about enough material, because these next tools are going to be a lot more meaty, so there's a lot more stuff.*

**Points to Cover:**

The purpose of this concept is to look at the gap between what we want and what we are actually achieving. This is a helpful concept when evaluating employee performance. What is the gap we need to fix?

Page 79-80

# Root of the Problem™


*Here's the second tool of the module. It's a diagram called the root of the problem. It's very important to understand that with any problem, there is going to be some obvious causes, but if we really want to solve it once and for all, we need to go down to the root of the problem. So we used the analogy here of the tree. What I did is I gave you an example of an actual scenario that I dealt with a few years ago.*

*Again, if you can think of your own stories, that's great. If you need to use ours, by all means, go ahead and do it. But I had worked with a group a number of years ago, and I worked with them after they had done one of their employee surveys. What this group would do is they would evaluate each department, and any department that had low scores, their manager then would have an improvement plan. I was working with them kind of working with some of the managers helping them with their improvement plans.*

*But one of the managers was noted on the survey that he had a problem dealing with conflict in the department. So what I did is I worked with his entire team. We spent some time talking about that. What we realized is that, while he may have had a problem in helping through conflict, if we kind of looked maybe differently at it, and figured out what's causing the conflict, maybe the conflict would just go away, and we wouldn't have to worry about helping him manage it better.*

*So what we did is we broke it down, and we asked the group, and I had them brainstorm using a tool you're going to learn in just a few minutes here. What is causing the conflict? Everything you see on that slide is was what I captured with the data, what we found out once we went through that is that maybe the biggest part of the problem is that the department is not designed to be the most efficient that it could be. So what it really came down to is we looked at how the department was structured, we used the flowchart tools you're going to learn in just a few minutes to identify that there was the root issue of the conflict, was that they were not equipped to handle the needs of their customers.*

*Once we removed some of those barriers, and we changed some processes, things went smoothly. There was no point trying to teach the management how to deal with conflict, we made the conflict go away. So the root* *of the problem means look at whatever the obvious problem is, and let's see if we can find the root cause. The tool we're going to look at shortly, the fishbone diagram, will help you do that. But the visual of the tree, I think it's going to be a powerful one, you can draw it up on a flip chart, and maybe get the group to give you some examples.*

*This is also something, then if you're an onsite facilitator at your company, you could take this out and use this if you're going to do some problem solving. So that's the second tool, the root of the problem.*

**Points to Cover:**

This concept is the introduction to root cause analysis.  We saw some of this with the SOAP tool in Module 3. The video explains how we used this with a customer a few years ago.

Page 81- 82

## The Flowchart


*The third one is probably one of the most valuable tools that you can use. That is a flowchart. It's a tool that's been around forever, it's a tool that if you have seen it, you probably have seen great results. I can tell you in my experience in the Navy, this was introduced, and people thought it was ridiculous. It made total sense to me, because I thought for the very first time, I see a very useful tool that could get to the root of some issues and problems.*

*I never forgot that. I've shown this to groups, I've used this in facilitating, and it has always been something that leads to great results. Now, it's important to know when you're doing the flowchart, and you're showing the group this, that number one, realize the purpose of the flowchart is for you to map out the current process, the current ways that things get done. So if you go back to the last tool, or the tool before that, the gap analysis, right.*

*So here's the desired state, here's the current state, what stands in the middle? Why don't we look at the process we're using right now? By drawing it out using these symbols, you can often find where there's breakdowns in the process, where there's duplication in the process, or once the process is running really well, use this to document the process, and that way, if you have to fix something, you can go to the flowchart.*

*I was looking at a how to diagram for the spa that we have at the house, and they had a brilliant flowchart of things to try. Once I went through that, I solved the problem. The visual is huge, and I think your group is going to benefit. So what we're going to do is, number one, I'll show you what the symbols mean, and then I'll show you what the activity looks like. It's kind of a fun activity. But there's a reason for it.*

*They generally agreed upon symbols of a flowchart is the start and the stop. I know that sounds like it's plainly obvious, but it's not. We need to know where the process starts, because there's where we can track our data collection. We need to know exactly where the process ends, because that's when we stop. This could be done on a macro level, great, big, you know, 35,000 feet. It can be done at a mini level, maybe 5,000 feet, or it can be done on micro level, ground level. It's up to you how you want to use it. But the symbols are all the same.*

*So we have the two ovals that are start and stop. Then we have the rectangles, which are steps in the process. The diamond is a decision point. From the decision point, yes typically points downward, no goes to the side, and then you may loop back up. If there is a decision to be made, yes, we would continue down. If it's no, we got to go back up, or we have to go in a different direction. Now, in the workbook, there is actually a nice diagram that kind of shows like changing the oil in a car. But I think would've been more useful is to give your group an opportunity to work on a project.*

**Points to Cover:**

Let the group know that this tool will be one of the most useful for them.  Be sure to explain when and how the symbols are used.  Then, run the activity on the next slide.

Page 83

# Flowchart Your Morning Routine

ACTIVITY #11

*What you could to is to tell them, "Listen," and there's space in the workbook for this, "I'm going to give you about 10 minutes and I want you to flowchart your morning routine from the time you roll out of the bed, until you get in your car to head to work, or get on the train, or whatever it is. And go down to the details." There's a reason for that, so make sure they know. "Okay, when you have a decision point, a yes or no, then you want to find out where it is." The purpose of this, and you'll see questions in the book, is to identify where are some duplication, where are some time savers.*

*It's interesting, because I've run this a number of times, and for some people it's just an obvious thing they could not believe they were doing it. But when they mapped it up, they realized, "I don't know why I don't do this differently." So what it does is it shaves time off your morning routine. 10 minutes is probably just the right amount of time. You can ask if anybody wants to share their process. And you could also ask, "How many of you have now found ways that you can improve?"*

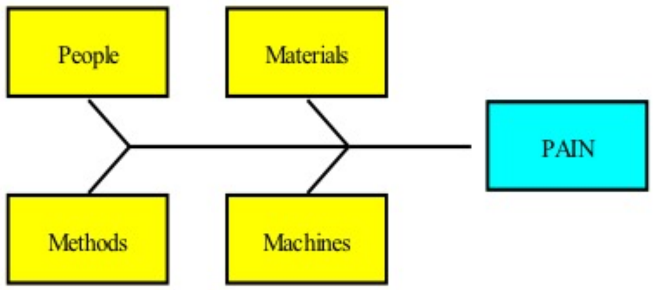
*This is all leading us, we want to start getting these tools down, because they're going to lead us to be able to solve that engagement problem that we talked about in the previous module. So that's your third tool, that's the flowchart.*

**Points to Cover:**

The purpose of this exercise is to demonstrate one of the values of a flowchart: to eliminate duplication and waste. Allow the group to share some of the areas they identified for improvement from their morning routine.

Page 84 - 85

# The Fishbone Diagram




*Here's the fourth one, it's called the fishbone diagram. Now there's several other names for it, I think the proper name is a cause and effect diagram. Fishbone we use because it looks kind of like a fish skeleton. The purpose of the fishbone diagram is to look for the root cause of your problem, and determine the reasons and the cause for the root cause.*

*What's really cool here is that we can actually go back to the previous module, when we found out the number one biggest restraining force to employee engagement in your company is this, that's what we would refer to here as the pain, the pain is something that needs to be fixed. So let's just, for example, because I see this one, it comes up a lot. The engagement would go up if communication was better. So the pain would be communication isn't working.*

*Well, the way to build a fishbone diagram is you ask the question why? And you continue to ask it until you get the right answer. But there's a lot of ways that you can do this. There's a very old story that you can sort of co-opt and change anyway you want. It goes a little bit like this. I noticed when I got married that my wife, every Christmas, when she would have a roast for Christmas dinner, she would take it and cut two big chunks off either side before she put it in the oven.*

*So when I asked her why she did it, she says, "This is the way that my mother taught me." So that next Christmas we went to my mother-in-law's house, and I asked my mother-in-law, as I watched her cut two big chunks off the roast, "Hey, mom, why are you cutting the ends of the roast?" And she says, "This is my mother's recipe, this is how I was taught to do it." Well, my grandmother-in-law was there at the house, so I took her in the other room and I asked her, and she told me, "This is how my mother showed me how to cook a Christmas roast."*

*As it happens, great-grandma-in-law is still alive, she's in one of those old folks homes, and so after Christmas dinner, we took a plate of Christmas food, and gifts to the old folks home. I saw my great-grandmother-in-law laying in the bed, all kinds of tubes and wires hooked up to her, so I leaned over to ask her why, when she cook* *the roast, she cut chunks off either end. She told me, "Well, I only had a tiny little pan." Again, that's an old story, it's been around forever. Tell it the way you want.*

*But what that gets us to think about is why are we doing something? Are we doing it because that's the way it's always been done? Or if we ask why enough do we get to the real issue? That's what's so important about the fishbone diagram. Now, you'll notice on the slide here there is four categories. People, materials, methods, machines. What's important here is to look for a logical category.*

*For example, it could be with communication breaking down, it could be a people problem. Why are people causing it to fail? Because we have a workforce that's spread out. Why? Because that's the nature of our job. Why? Because it's this. And you ask why until you can come up with actually a pretty good reason why a thing is what it is. It could be something to do with materials, or methods, or processes, or machines. But the purpose of the fishbone diagram is to have a place to put the answers the why question. What we're trying to find here is a root cause to the pain.*

**Points to Cover:**

The Fishbone (or Cause and Effect) diagram helps explore root cause.  We do this by asking WHY? as many times as needed to get to the root cause of the “pain.”  Note that in coaching, we don’t use WHY but it’s appropriate here.

Page 86

# Fishbone the Biggest Engagement Restraining Force

ACTIVITY #12

*While working on this, we're going to bring back some of the data that we got from our last module. So that is the activity, activity number 12, is the fishbone the biggest engagement restraining force. This is why it'd be really nice if you could hit the cohort together, or do this on the same day, or during the same event. Then we go back to their flip charts, find the number one biggest restraining force. Fishbone that thing out. See if you can cut it back to its root cause. And once you find whatever that root cause is, then we can use the next tool to help us figure out some solutions.*

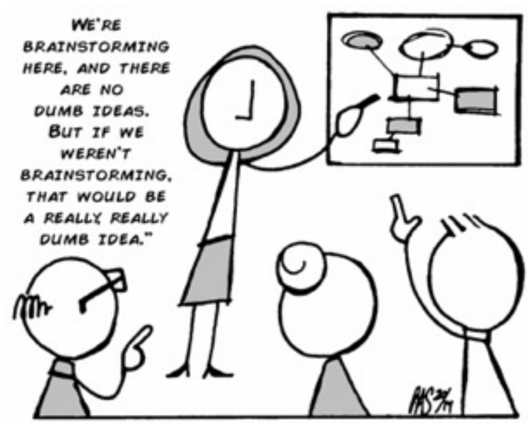
*This should probably take about 10 to 15 minutes. You can again play their theme song in the background, but get them working. This is probably a really good to do in the afternoon when people have been sitting around for the whole day, gets them up out of their seat, that's the fifth tool, the fishbone.*

**Points to Cover:**

Have participants go back to the same groups (if possible) they were in for the Force Field Analysis exercise. Have them do a Fishbone for the biggest restraining force to engagement.

Page 87

# Brainstorming




*Here's the sixth. It's brainstorming. Now, the act of brainstorming is simply getting people to get together to throw ideas out on why something may be operating the way it is, or why a certain thing may not be ... whatever it is, it's getting and generating as many ideas as possible. The general rule of brainstorming is there is no such thing as a bad idea. Look at the cartoon, kind of tongue-in-cheek. But the reason that no idea is a bad idea is even a bad idea can spring out in another direction, or maybe you haven't thought about it before.*

*So when it comes to brainstorming, there's several ways you can do it. You can use post-it notes. Post-it notes are really handy. You can write one idea on a post-it, and you can stick it on the wall. You could always have one person at a flip chart or a whiteboard and people call out stuff, and they write it down. That's another way. Depends on the cohesiveness of the group, and the comfort level of the group. Some people are not comfortable throwing ideas out, so if you can let them write it down on sticky notes, that's a way to get more information out.*

**Points to Cover:**

Be sure to cover some of the basics of brainstorming including the mandate that there is no such thing as a bad suggestion. Let them know it can be facilitated live or by the use of Post-It Notes.

Page 88

# Brainstorm Solutions to Remedy the Biggest Engagement Restraining Force

ACTIVITY #13

*What we're going to do then for the activity, so explaining it might take five minutes. But then, let's go back to the fishbone diagram, right. So what we're doing is we're trying to find ways that we can fix the biggest restraining force. That's where brainstorming comes in. So to do this activity, my recommendation is to use post-it notes. So you'll have post-it notes in your kit when you get your trainer guide and your workbooks, and keep your groups together, give them a pad of the post-it notes, and maybe next say, "Let's see if we can figure out some solutions here." And in the spirit of brainstorming, no such thing as a bad idea. One idea per post-it note.*

*When you're done, stick them on the wall. So you would need lots of wall space here. That always works best. Put them up in no particular order. Because the next tool is going to put them in order. But let them brainstorm for maybe 10 minutes. When they're completely done, tell them, "Okay. What we're going to do now is go back to our seats, because we're going to take a look at the seventh tool, and that's a tool called the affinity diagram."*

**Points to Cover:**

Have the groups go back to their flipcharts and brainstorm solutions that that Number One biggest restraining force to engagement. They can refer to some of the data they collected from the Fishbone activity as well.

This brainstorming should be done using Post-It Notes. One idea per Post-It. Have them stick the Post-Its on the wall or a flipchart. This will set you up for the next tool and next part of the activity.

Page 89 - 90

## The Affinity Diagram

*The purpose of the affinity diagram is to take your brainstormed ideas, and put them in some logical categories.*

*There is a couple different uses for affinity diagrams, the first one you're going to experience, but another one that really works well, and I've done this with groups too is like, let's say a group wants to come up with some corporate values. So what I have a group do is to get post-it notes and write down as many behaviors as they can that they would expect to be treated like in their organization. One per post-it, and put those all over the wall.*

*Now, the affinity diagram, the affinitizing means that we need to stack does in logical columns. So you can do that with your values, but in our case, what I'm going to ask you to do is tell your groups to go back to your walls, with all your post-it notes, and together, see if you can put them in some logical categories, stacking them from top to bottom, in no particular order of importance, just make sure they are similar. If you find one that could be an exact duplicate, you can stick that on top of it. If you find one that could go in two different places, make a copy of it or write it on another post-it, put it, but we want columns. That's what we do.*

*So give them maybe five, 10 minutes to do that, and once it's done say, "Now, what I want you to do is write a header card that summarizes what is in that column." This might be something that parallels very nicely to the cause and effect fishbone diagram, or it works well on its own. For example, in the organizations that do this for values, those behaviors could be summed up maybe in one column is respect, or team work, or integrity. Then, I tell the group, "Those are your corporate values then. Because you've told me these are the behaviors that you expect."*

*The neat thing about using this now for your engagement project is that now you can say, "Wow, there's all these areas now that we can look at." And we can take this very nebulous concept of employee engagement, and we can say, "Listen, engagement happens when these conditions are in place, and the affinity diagram can* *really, really help." Let them work on that for a while, and then they can take their seats, and that'll take us to the next tool.*

**Points to Cover:**

Affinity Diagrams are used to categorize the data collected when solving a problem. The video gives examples of how we used this to help an organization develop corporate values. Then have them move to the activity.

Page 91

# Affinitize Your Brainstormed Solutions to Remedy the Biggest Engagement Restraining Force

ACTIVITY #14

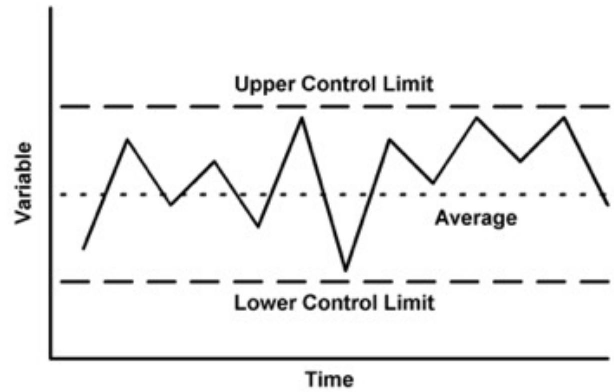
*Okay, so this is your activity. This is one that you, right, this is the activity we're going to affinitize. This one here is one that I don't have an activity for it, but a run chart is a place where, so let's say for example that through our affinity diagram, we've come up with some things that we want to do.*

**Points to Cover:**

Instruct the groups to work together to put the Post-It notes in logical columns.  If there is an exact duplicate, the Post-It can be placed over the top of the duplicate.  Once these are in like columns, then design a HEADER for the column that summarizes in a few words what the column is all about (i.e. communication problems, organizational politics, etc.).  They will be using this information in the next module.

Page 92 - 93

## Run Charts




*The best thing to do if you're going to make a change is try to test it on a small level, and track the data. A run chart is a great place to be able to do that.*

*So we would use the run chart if we were going to track data over a period of time. What we want to do is we want to set what we call tolerance levels. Especially if we've tried to improve a process, we have to measure to see if it works. By measuring it over time, and setting those control limits even more narrow, we get a more efficient process. Maybe what we would do like in this example of a run chart, let's just say that we were tracking my weight over time.*

*So we're going to measure it over 12 months, and we noticed that on a typical day, the highest I ever weigh is, let's say, 220 pounds. The lowest is 195 pounds. Those are our upper and lower control limits. Now, let's just say I'm looking for the optimum weight. I would set my control limit then for like 200 on the top, and 190 on the bottom. So that would mean 195 would be where I'm going. I want to see if I can keep to that. So every month I would step on the scale, and I'll notice that after a while, the weight starts to come down into the control limit. That's good. Because I'm tracking it over time.*

*Over the period of maybe five or six months, it's staying in the control limits. Maybe after a year I realize, you know what? I could even narrow these down even more. I can change the limits and further get myself into a better, healthy place. Now, what's neat too about tracking it over time it's we can look for what we call common cause variation. Common cause means it could just be on a regular day.*

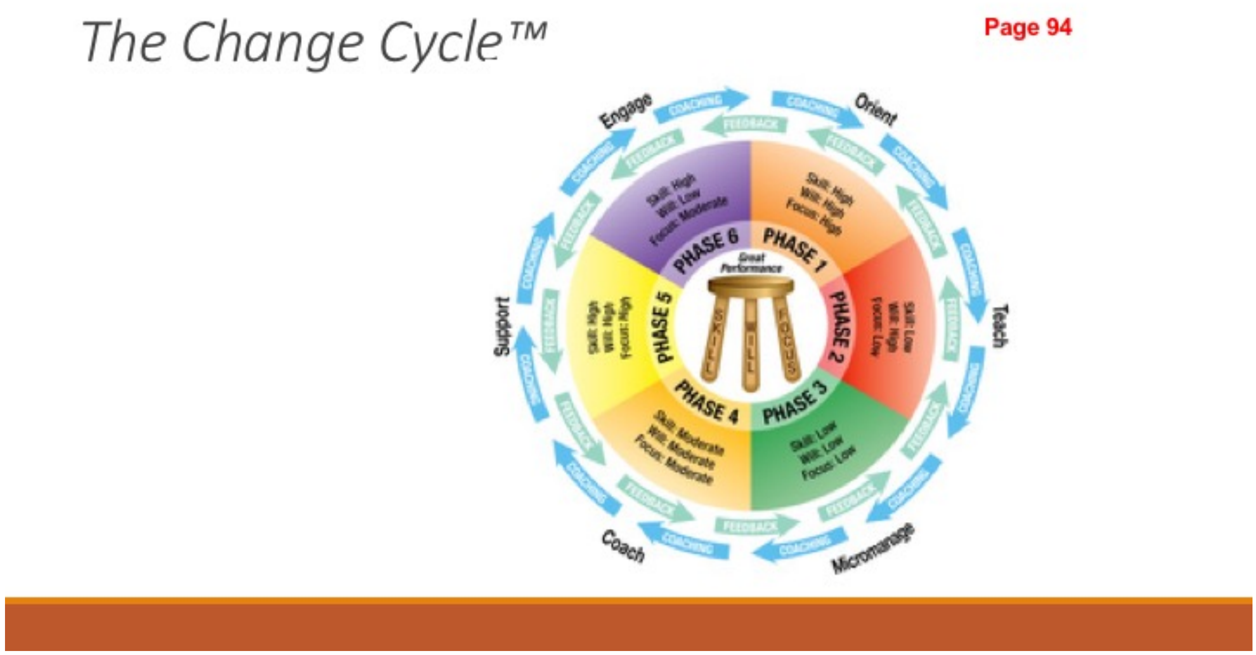
*Let's say that you're just retaining water or something, but then let's think about special cause variation. Maybe after tracking my weight for two years, I noticed that every October, November, December my weight goes up. Gee, I wonder why that is, is it cycles of the moon? Or maybe it's just that's when the holidays are, or the weather gets colder. So what you want to do is by looking at your run chart, you can track the data and say, "Okay, what happened during this month that made us go out of our control limits?" Then you can find out what that is.*

*Then again, it can come back to your gap analysis. Okay, here's the normal right here, and here's the desired state up here. There is a gap, what is it? Well, we have holidays in there, so we have to be able to fix that. Remember, the purpose of this module is to get your audience to start thinking in a business format, to start looking beyond assumptions, and look at data. So that's about as deep as the data tool goes. But I think it's a good one to get them started.*

*So you'll notice that we've taken from our force field analysis, we've taken our number one biggest restraining force, we've worked that, we've brainstormed it, we've affinitized it, we're trying to get it down and say, "If we can do these handful of things, we can make a real dent in improving our engagement." Okay. But that does take us to the next tool. And this is where things start to get a little dicey.*

**Points to Cover:**

A Run Chart enables users to look for patterns when data is being collected to solve a problem. By identifying upper and lower control limits, you can set a standard that keeps a process in check. You can identify special cause variation using this. Finally, you can see if there are any anomalies that cause a process to go out of standards.




*Because any type of improvement that we want to make or initiate requires change. So the next three tools are all about how to get a person to accept, and to thrive whenever there's a change. The first model here is the change cycle model. You'll notice this looks an awful lot like that ring bell model that we used back in module three. It's because it's very similar. Rather than rounds of development, we're simply going to identify phases of change.*

*Notice that on the outside, we've made even a formal process of having feedback and coaching, that is the job of the boss to get people through those times of change when things get really uncomfortable. Now, notice, just like before, there's different levels of skill [inaudible 00:22:02] and focus, different type of approach would be needed. We start in phase one of a new change. There is typically some excitement around it, people are kind of excited, they're a little enthused.*

*So let's just say that we've decided, "Hey, we're going to do this new thing to improve employee engagement." "Wow, it's going to be kind of cool." The job of the boss is to orient people and say, "Listen, I know it sounds like an amazing thing, but I can tell you it's going to be harder than it looks. Here's why." That should then, just like before, bring them into this phase two of change. This is where skill and focus are low, because we don't know what we're going to be doing, but we are still enthusiastic, and that's where teaching needs to take place. Just like in that round model, right.*

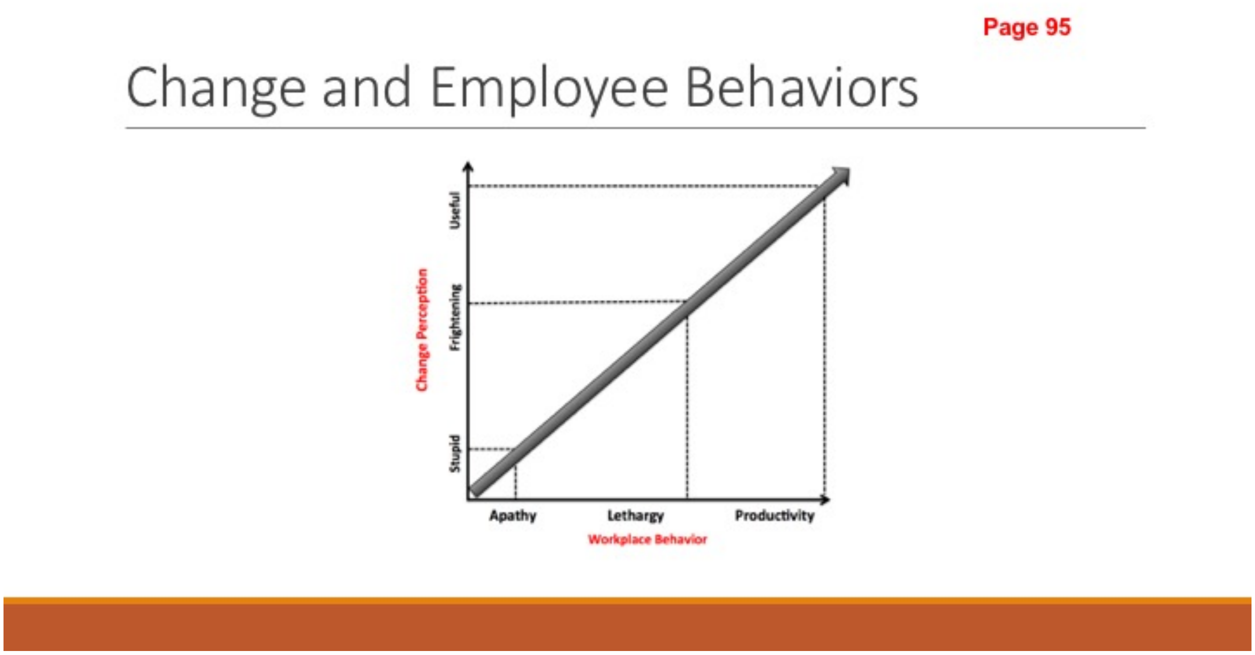
*So we want to show them how it's done. Letting them know that about six to eight weeks, just like before, you're going to hit this phase three. And I'm going to have to micromanage you. So this is when the change suddenly becomes too hard, too uncomfortable, stressful, we don't have the money for it, and that's where people want to quit. But this is, as the boss, you're going to have to push them, right. Get them through three into four, just like before, phase four skill level and focus are becoming moderate, they coming back, you coach them. In five, you support the change. Then, beware of phase six, because that's where people start getting antsy again.*

*You know, this mirrors, I think, it's Kurt Lewin's model of change, where you have something frozen, and then you thaw, and then you refreeze. That's basically kind of what this is doing too. We are identifying a need for change, we are thawing out the frozen behavior, we're redoing it, we're refreezing it, it gets kind of uncomfortable, then it becomes the norm. So if you can at least let your audience know that this is typically how people process change, they'll know what to expect.*

*The next two tools are going to explain how people react primarily when they're in that phase three.*

**Points to Cover:**

The next 3 models show how The Boss needs to lead their team through times of change.  This model mirror the Boxing Bell model from Module 3.  The Boss needs to know how to coach and guide their team through the various stages of change.




*So here's the first one. This one shows you the difference between change and employee's behaviors. So on the Y axis, what you're looking at there is the change perception. Now, what we mean by the change perception is how people view the change. Do they see it as stupid? Do they see it as frightening? Or do they see it as useful?*

*Then you notice on the X axis, these are the types of behaviors you're going to see. There's apathy, which means like I just really don't care. There's lethargy, which means I'm actually showing non-verbal, like I'm scared, I'm moving slow. It's like I'm sick. Or productivity, where I'm moving fast. If you look at the graph, here's what it tells you. If people perceive your change effort, your idea as stupid, they're going to be very apathetic, they just won't care. If they see it as scary, frightening, they're going to respond with lethargy, less energy. But if they can perceive it as useful, they will approach it with productivity, which means your job as the boss is to frame that change and make it useful.*

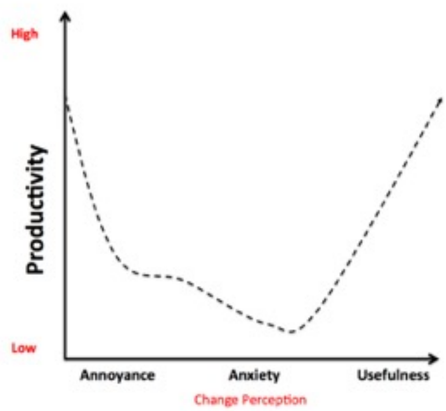
*Show them the benefits of it. Explain the hardships that you will go through, but realize on the other end it's good. If they can see it as useful, this will make that round three, that phase three experience a lot more palatable. So that's the first way of looking at it.*

**Points to Cover:**

This graph shows how important it is for The Boss to stress the need and importance for the change.  If people see it as useful, they will get behind it.  The Boss needs to SELL THE CHANGE.

Page 96 - 97

## Change and Productivity




*Here's the second. This is what happens with change and productivity. The change perception, again, we're going to look at that this time on the X axis. When people perceive the change as annoying, when people see the change as eliciting fear, that's anxiety, or when they see it useful, you're going to see different levels of productivity. So notice when people see the change as annoying, you're going to see productivity dip. When change is frightening, it goes to its lowest level. But when people see change as going to be useful, productivity goes up.*

*What is the rule? The rule is make the change something that appears to be useful. Frame it, promote it, market it, whatever it is, you're going to have to work extra hard to make sure people see that this is something worth getting excited about. That is a skillset we're going to learn in the last two modules as we start looking at how to leverage power and influence. But this is just a little wake-up call to let you know, if you don't know how to make something look useful, it's probably going to fail. Which takes us to the end of module five.*

**Points to Cover:**

This model demonstrates how productivity is directly related to how people feel about a change.  Again, the job of The Boss is to SELL the change!

Page 98

# Module 5: Summary and Commitments


*Again, just like in previous modules, take some time to do start, stop, continue and change. This is probably a good time to give them a break, and then you come back to module six. We're back into the tools this time. And this is where we make our final adjustments and we put all of the tools on engagement together.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 99

# Planning and Prioritizing

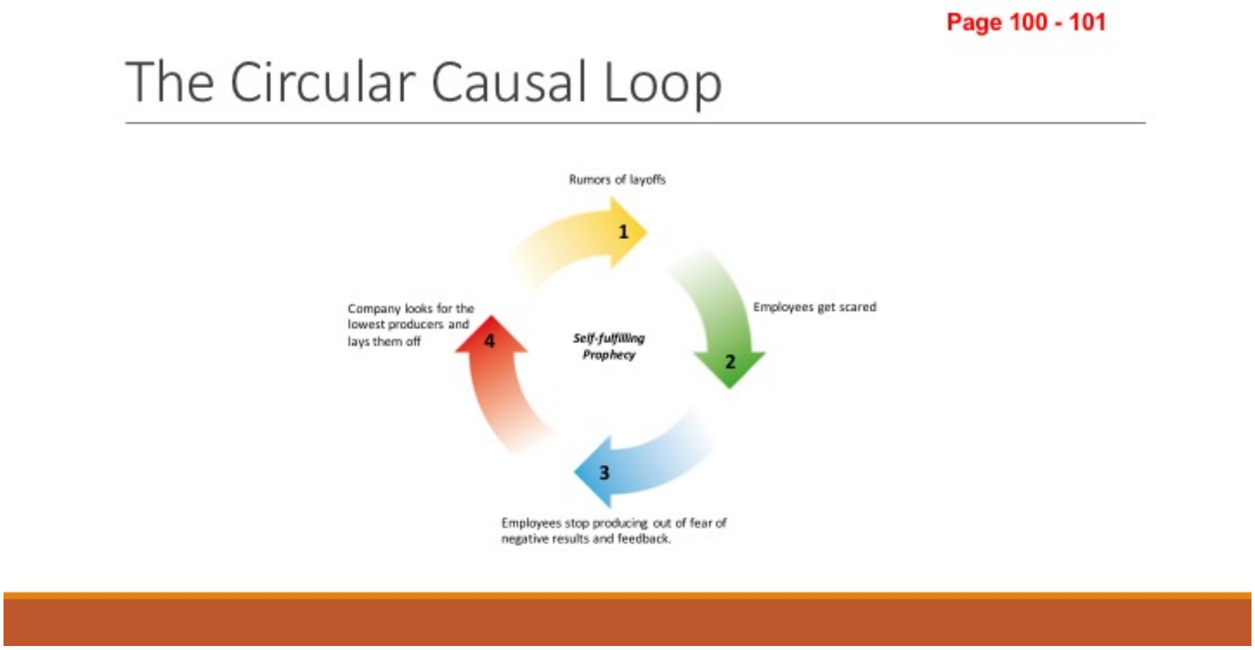
MODULE 6

*Welcome to module six of driving results. Now, module six continues what we did in module five. We're learning a lot more tools. If you remember back from the intro, when we did the triangle, right? The great boss triangle. It was the great boss has to fix systems and processes. They have to protect the house, and they have to develop people. Well, we are really focusing now on that last ... like I said in the first part, which is fixing systems and processes.*

*So, this module has tools again. There's actually one activity in this, and this is where you kind of put the final touches on the activity we started back in module four, which is looking for the biggest restraining forces on engagements. So, there's a tool that we're going to look at for that. But, these are some tools on planning and prioritizing.*

**Points to Cover:**

This module adds in more tools and wraps up the work done in the past two modules on employee engagement.




*So, we begin with the first one. The first one is a tool called the circular causal loop.*

*Now, some of these tools are not tools that you can actually put to use, but they're tools that should get you thinking. So, stress this as you're teaching this, that as the boss, you've got to make really good decisions, and those decisions are the kinds of things that may have long-term consequences. So as you're making your decision realize that whatever you do today will be impacting people way down the line. Secondly, you need to look at bigger picture, bigger data, if you're going to make good decisions.*

*So this one here is just kind of a concept. It's the circular causal loop, and so what it says is that sometimes the things that we do create the very condition that we're trying to prevent. So, in this little example that you see here on the screen, this is also in the workbook, we begin with rumors of layoffs. So, think about what happens when there's rumors of layoffs in your organizations. Immediately everybody gets scared, and the fear comes from the unknown.*

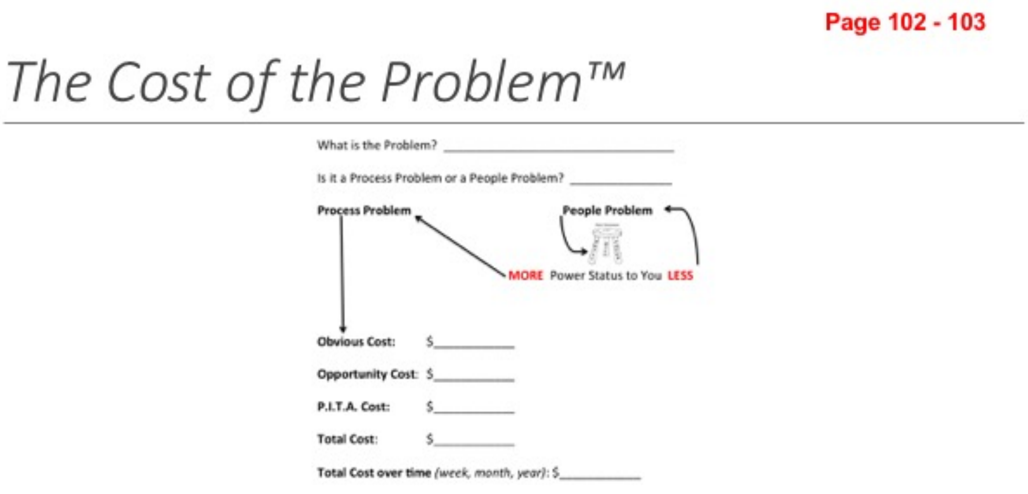
*"I don't know what's going to happen, but I'm going to assume it's probably the worst." We saw this way back in module two when we looked at that Johari window, right? In the absence of information, people fill in the gaps. So, in step two of this circular causal loop, now employees are scared. So, to prevent the fate that they hope to avoid, they say, "I better not do anything that gets me noticed, so I'm not going to produce. I'm not going to come up with new ideas. I'm not going to take on any challenges because if I screw up, then I'm gone."*

*Well, step four says the company is looking for people to get rid of, so they take the people who they don't get anything from, which really means that it's become a self-fulfilling prophecy, right? "I thought there would be layoffs, and so I didn't want to be laid off, so I scaled back on my work so I didn't stand out, and because I didn't stand out, I'm one of the ones that gets laid off." So, it's a viscous cycle, and stress this in the workshop, that as the boss, we can't fall victim to that. We can't make something a self-fulfilling prophecy. We've got to be the ones to look at it from a distance and think bigger picture.*

*So, that's concept number one. It's not really a tool, a concept. However, the second one is an actual tool.*

**Points to Cover:**

This is a concept that demonstrates to attendees how a self-fulfilling prophecy can come of news that is frightening or threatening to employees.




*It's a tool called the cost of the problem. What this is, is a step-by-step methodology to put a price tag on a problem. Now, this is going to be very important, because all of those tools that we've looked at in the previous module are tools that are eventually going to help us come up with some sort of a solution that we need to promote, maybe to more senior managers than we are.*

*To do that, it's often helpful to use the language of money, because in many cases, this is the only thing that's going to cause a person to see things our way. Well, the cost of the problem methodology is a step-by-step, and so what we're going to do is I'm going to walk you through it, and then we'll explain what the activity's going to be, which again, is the final part of what we're doing with the restraining force is to engagement.*

*So, it begins with an identification of what is the problem, and a problem is simply the current reality that doesn't match up with my expectation would be. So, I wanted to do this, but instead I have this, and this is a problem for me. So, we need to really define the problem first, and we haven't really gone over that in this program, but you might want to stress it here that make sure whatever the problem is, it is the root issue of the problem. We discovered root issue back in the previous module with the fish bone diagram. So, whatever the root cause is, after we've asked why five times, this is the problem. The second step is to identify is this a process problem or is it a people problem? Now, if it is a process problem, we have a methodology. However, if it is a people problem, we've already discovered how to fix that, and that is by going back to that three-legged stool of great performance, back in module three.*

*And it goes back to those three legs. Is it a skill problem, the person doesn't know? Is it a will problem? They don't want to do it. Is it a focus problem? Their work is not aligned with values or focus factors. Now, there's a key component here to pay attention to, and that is this. If the person who is the problem has more power than you do, you better make it a process problem, because you won't win this fight. However, if it is a people problem and the person has less power than you, traditionally with positional authority, we can treat it as a skill, will or a focus problem. So, you have a choice to make. This is kind of a mini, weird looking flowchart, but this is the choice we have to make.*

*So, let's assume that this is number one, a process problem, or it's a people problem that involves somebody with more power than you. Here's a classic example, and I see this all the time in healthcare. You have a physician who is causing moral problems, hate and discontent. They're mean and nasty. And because they have more power than the managers, you can't do anything about it, so your only hope is to put a dollar figure to it. So, when we start talking about the cost of that problem, we go with the obvious cost first. So, what is the price tag on the problem? What is that problem costing us?*

*So if it is, let's say, a problem with turnover. What's that costing us? Well, the obvious cost is that we have recruiting charges we have to do, we have training costs and things like that. So, you want to total up what is the obvious cost of somebody turning over, right? And let's assume they've turned over because maybe they're working for this horrible doctor that everybody's terrified of and nobody has the courage to get rid of, which by the way is a very common problem. So, the obvious cost is the cost of recruiting somebody else.*

*But then there's the opportunity cost. The opportunity cost is what we are having to spend because we can't do what we're doing right now. So, let's just assume, back to the healthcare model, that because this person got fed up with this doctor, they left. Now, somebody has got to fill that hole while we're busy recruiting somebody. So, the opportunity cost is how much is it costing us now because these people can't do their jobs? There's a dollar figure for that. You can start with hourly wage. You can look at other problems that are coming as a result of this.*

*Then there's the third cost. It's the PITA cost. That's an acronym, or a short version of pain in the ass, is what that stands for. Sometimes it's an inconvenience, so the PITA cost to having this bad physician on the staff is that morale falls down and people are not as motivated anymore. Because of that, they're being nasty to patients and the patients are filing complaints. So, there's a third factor.*

*Now, when we've got dollar figures for those first three, then we total them up, whatever that dollar figure is, and then you can cost it out over weeks, months, years. So, then your job as the boss is if you have determined ... let's just go back to this example, that this doctor is causing lots of problems. You want to plead your case to the chief medical officer. Let him know, "Hey, this doctor's causing problems and we need to do something. We need to get rid of him." Well, he's very important. He brings in 10 million a year with his practice and you say, "I get it, but we factored it out and he's costing us over three years, and yeah, it doesn't come close to three million, but I can tell you that over time it will and here's our cost."*

*So, what you want to do is factor in what's the obvious cost, that's the price tag, what's the opportunity cost, the cost of what we're not able to do because of this. Third is the pain in the ass, whatever that is that's affecting morale and annoying people. Total cost, cost over time. Simple model, but let's put it to use.*

**Points to Cover:**

This is a methodology the shows attendees how to SELL an idea to upper management. This works especially when upper management has a lot of Sharks and Spiders. Use data to sell.

When the problem is a PEOPLE problem, use The Three-Legged Stool of Great Performance. When it’s a PROCESS problem or a problem that comes from people with more power, it might be better to treat as a PROCESS problem using the cost breakdowns. These are explained in the video.

Page 104

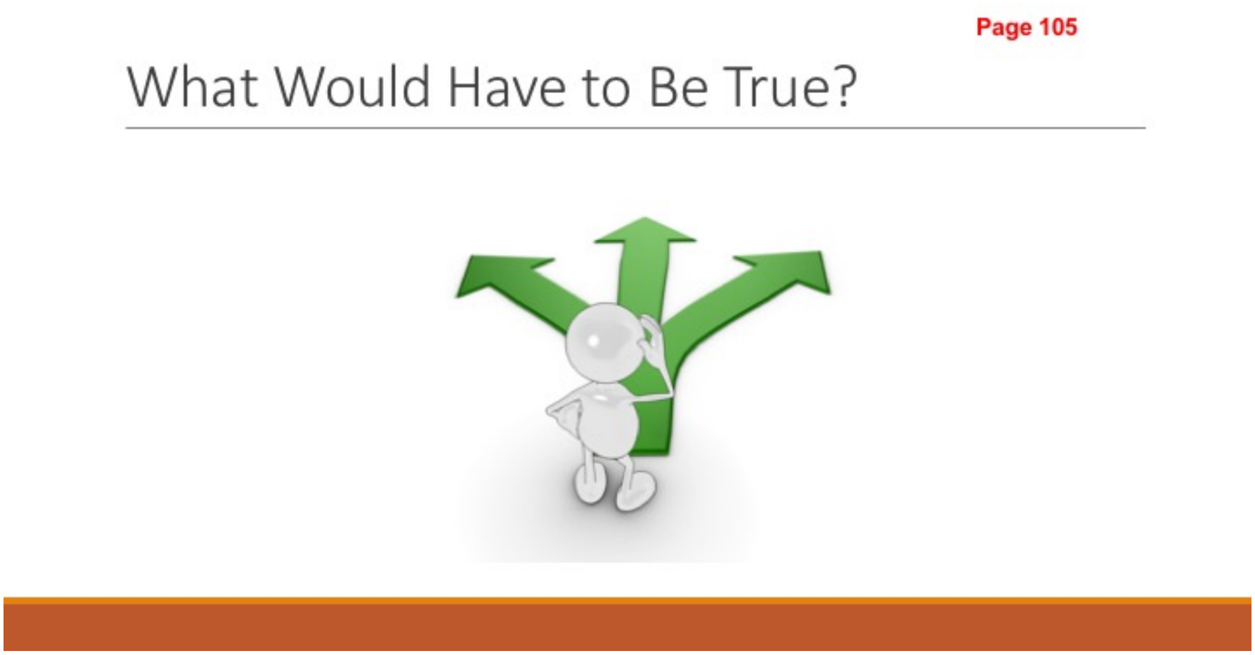
# Cost Out the Biggest Restraining Force to Engagement

ACTIVITY #15

*So, this is going to be your next activity, activity 15, and what you want to do then is get people together, put them in their table groups, whatever it is, and give them maybe 10, 15 minutes to cost out their biggest restraining force to engagement. So, we have done lots of things with that list, right? We've cut it down to the top three. We've identified the one. We've gone through the fish bone. We've gone through several other tools. This will be the last time we use this activity, but put a dollar figure on it. Some of this they'll have to estimate. Some of this you might have to guess. But what you want them to leave with after this activity is that as the boss they better make good decisions, because the next couple of models then are sort of cautionary tales before you make that decision.*

**Points to Cover:**

This is the final part of the engagement exercise. Using the Cost of the Problem™ strategy, put a dollar figure on the biggest restraining force. This will help you sell the ideas you came up with in the Brainstorming activity.




*So, here is our next model. It's called what would have to be true. Not so much a model or a tool as an important question. So, the next two actually are kind of like cousins of each other. So, the first one is a solution. So, going back to the activity on engagement, maybe we come up with this solution. We are going to try incentive pay to eliminate factors that drive us against having an engaged workforce. So, for a bonus program, compensation program to fix the issue with engagement, what would factors be that would make that true?*

*So, this is where you can brainstorm. We go back to the brainstorming tool. What would have to be true if giving people more money led to better engagement? Well, number one, they would have to value money. That would be one. That would have to be true. They would realize that they had a piece and they contributed to this issue. Okay, that would have to be true. We would have to make sure that all of the state and federal laws on compensation would be okay. So, this is a brainstorming, right? It's sort of like red teaming this, but in a positive way. If this was to be successful, what are the factors that would have to be in place? It's a great way just to double check your decision.*
*So, no exercise in the module, but if you can think about some activities or maybe some examples you have to put this into real life, especially if you're teaching this at your own organization, use that.*

**Points to Cover:**

This is a concept to help attendees make better decisions.

Come up with the best case scenario for a tough decision.  Then brainstorm what conditions would have to be true for this to actually happen.  The next concept takes the opposite approach.

Page 106

# The Pre-Mortem


*Now, there's another type of question to ask, and it kind of works the opposite way. It's called the pre-mortem. All right, so the first tool assumes that your idea would be successful. This one assumes that it will be a big failure. So, in the world of, I guess, medicine, whatever, or crime solving, we have this thing called a post-mortem. You find a victim. You have somebody who dies in surgery. So, when it's over, you put them in a room and do an autopsy. They call that the post-mortem, mortem meaning death, I guess. So, post is after.*

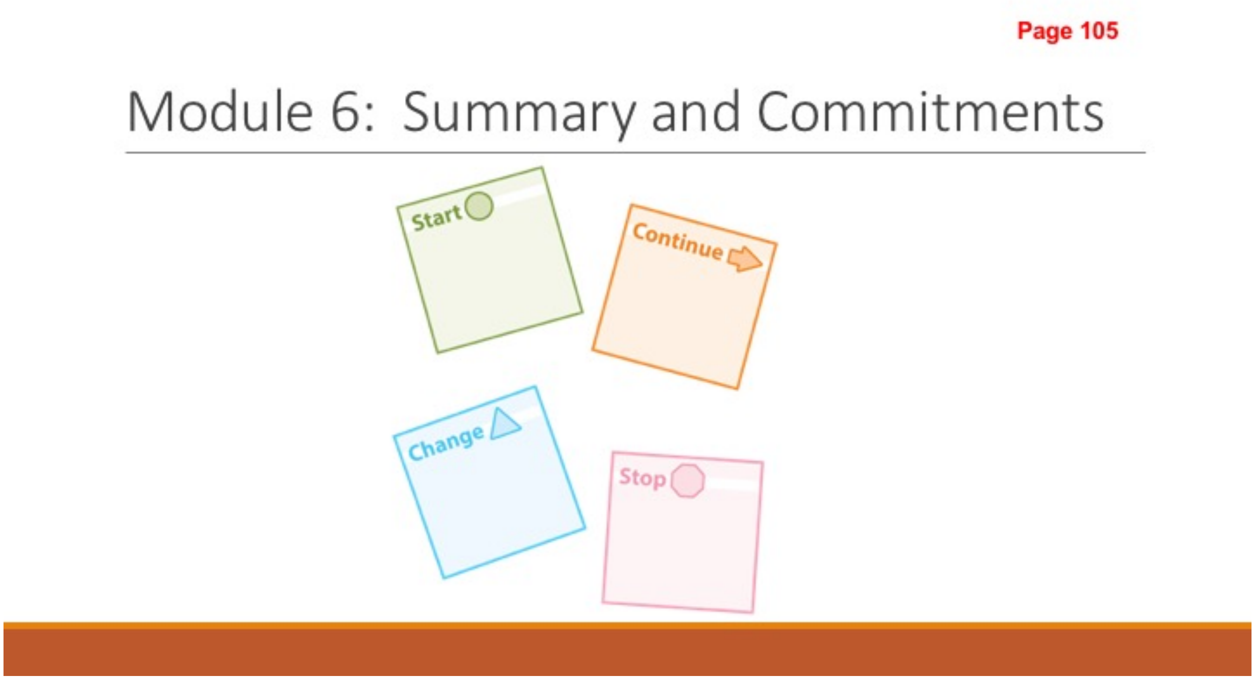
*Well, that's when you look and you say, "Well, this person died. We didn't realize they had this issue. As we removed their organs, we could see this condition." But, why don't we reverse that a little bit? Let's assume, before the patient goes into surgery, they will not survive the surgery. So, why did they not survive it? And this is a way to kind of back yourself out and say, "Okay, let's look for any possible flaws before we take this one."*

*The first tool, what would have to be true, assumes that you're going to do it, and these factors are in place. This is making the other assumption, "Hey, it failed." So, this is a great tool. You can teach your managers this because going back to the focus factors, remember we had mindset, optimism, pessimism. If you can somehow get your audience, and this is a lesson to teach your managers, get all of your negative naysayers and put them on a pre-mortem team. Get all of your pie in the sky people to be part of what would have to be true. You work those two crowds together, I guarantee you're going to get really good solutions. So, the pre-mortem assumes the patient died. The What Would Have to Be True model assumes they survive and it was a great success. Okay? So, two good tools which by the way leads us to the end of module six.*

**Points to Cover:**

This is another way to check the viability of a solution or idea. Assume the idea was a complete failure. What caused it. This is based on the reverse of a post-mortem. Post-mortem establishes cause of death. In the pre-mortem, we assume the patient WILL die. How can we prevent it.




*So, again, summary in commitments, give them a few minutes, things to start, stop, continue and change. When you're done with that, probably a good opportunity for a break. Now, the next module is a fairly short one. It's really nothing more than an assessment and you explaining some different power and influence strategies and no activity at this next one. It's a short one. And then our final module pulls that together. So, we'll check out module seven in the next video.*

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 109

# Your Power and Influence

MODULE 7

Welcome to module seven. Module seven is about your power and influence. Now, module seven, in a couple of ways, is going to tie back to earlier material, so this is why it's really good if you can kind of reinforce the earlier modules before you get into it.

The purpose of this module is to give your participants an additional set of information about what they bring to the role. Back in module two, we did the MBSP, so they knew that they had different sort of behavior patterns based on those animals. What we're going to look at in this module then are some power and influence strategies that they can add in most cases, in fact, in all but one case they can actually add this to their repertoire.

In the workbook you'll notice that there is an assessment where the participants, as you walk them through each of the power and influence strategies, will self-access on a scale of one to five how often they are using this power and influence strategy, or if they have it in the first place, and so t's a place to develop. Now, let them know they'll be scoring this in module eight, and what we're doing here is a foundation for module eight. Module eight is how to deal with organizational politics, and that's the last one in the program.

**Points to Cover:**

This module sets up the final module of this program. It revisits the Power/Influence Push/Pull model from Module 1. You'll talk them through each power and influence strategy and have them identify where they operate from on the assessment in the workbook. It is scored in Module 8.

Page 110 - 111

## Power

- Position
- Expertise
- Resource
- Information
- Proxy
- Reward
- Punishment
- Personal
- Charisma

Well, let's go ahead and start with power. All right, so we can go back to what we talked about in module one or in the intro when we looked at power and influence, remember? We realized back then that sometimes our direct reports expect us to have more influence, our seniors want us to have more power. We used the analogy of your inner Chuck Norris, inner Steven Seagal. Well, this is where we can revisit that now.

We're going to look first at our power strategies. These are bases of power, and power is what we use then to push to get things done for ourselves and for our team. I'll give you kind of a little example of each one, feel free to use your own example, I think that'll make the material come to life, the stories are what people are going to remember more than anything, video's probably second, and then some of the models third.

We'll start with position power. Position power is what you have by virtue of the title. Usually everybody in your workshop will have some sort of position power. Now, there's a danger in position power because the more you rely on just the title, the less people respect you as a person. As you're going through this, tell them, "On your assessment, how often are you using your position power, which means I'm telling you do what I say because I'm in charge?" Not always your best strategy.

Your second power base is expertise. It means people do what we want because we have expertise that they value. As the boss, if you were learning how to fix systems and processes, this gives you more power, it gives you some credibility. With expertise, leverage that, that is a form of power. Again, tell your group, "Put yourself on a scale of one to five, how often are you using this?"

Third is resource power, people do what I want because I have access or I control resources that they value. Again, this is something that can be abused, all these powers, by the way, can be abused, so just a cautionary tale, use them but don't abuse them. If you have access to resources, you must treat those and use those in a respectful manner.

The fourth one is information power. It means that people do what we want because we control access to information they value. This is one that you have to be very careful of because the information you are being entrusted with, you have a responsibility for. We can look at abuses of information power with people like Edward Snowden, who, even if you like what he did, you have to realize that he was entrusted to protect this information, he chose not to do that. There's a consequence for that.

Then, we have proxy power. Proxy power is an important one because this enables us to leverage the power of other people who may have more than us. It's our connection to them. The analogy I like to use is that if somebody had their finger stuck in an electric socket and were getting shocked and we went to grab them to pull them away, we'd get shocked as well. We are in proxy to them. This is a good lesson, let them know that if you have proxy power with somebody who's respected, you will get respected too. Of course, that cuts both ways. If you are proxy to somebody who does not have respect, they will see the same of you. Ask yourself how often are you using proxy power.

Then, there is reward and punishment. These are two common ones that newly promoted supervisors often get in trouble with. Reward power means they do have power to reward, so they assume that when people are being nice and buttering them up, they really respect them, when in fact, they just want a reward.

The other one to be careful of is punishment power. Now that you have some positional authority, you have the ability to punish people, but after a while, that gets old. When the punishments don't hurt anymore, that's when you've lost that power. Be careful.

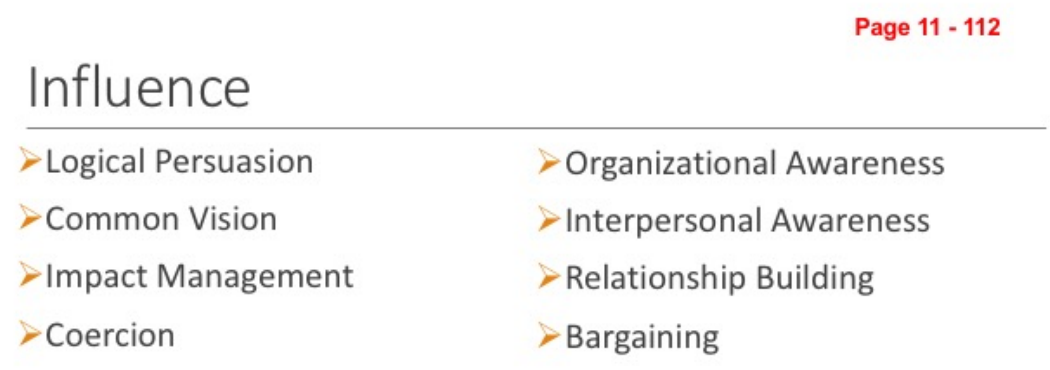
Then, there is personal power. It just means that people like you, and when you are open to building relationships, this is a good one to have. All of us need to work to build more personal power.

The last one on the power list is charisma, what this means is people are just completely bowled over by our charm, and they are just like rapt in us. Now, when you are telling your audience to score, tell them, "Listen, if right now you're thinking, 'Hm, do I have it?' You don't. Don't worry, you can never get this. This is something that's sort of naturally inherent. You see this most often probably with dolphins." If you don't have it, don't worry. If you do have it, make sure you've got other power that you can supplement this with, otherwise, you don't have a whole lot that you can work with.

As you wind this up, remind them to go through and score those assessments on one to five, we will score the tool in module eight.

**Points to Cover:**

The video walks through the definitions of all of these and gives examples. Feel free to use your own examples if you have them.




Let's change over then to your inner Steven Seagal. This is your influence strategy. There are eight strategies for influence, these are different because what you will do is learn these and use these to draw people toward you. This works best when you have to get someone that has more power than you on to your side.

We can start with our first one there, that's logical persuasion. It means that you are using data and numbers to make your point. Now, this one works really well when the person you're dealing with has more power, might be a spider, right, they're just into those types of technical details. You make your case using language they understand, that's logical persuasion. Again, have your group give themselves a score on one to five.

Common vision, then, is positioning your idea to show how it impacts the greater good. This is one that really appeals to golden retrievers and also, probably, to dolphins too, and maybe even to some extent the shark, right, showing how we are trying to serve the greater good.

Impact management is a real good one for people with short attention spans, it gets attention. It's using kind of wild ways to make your point, so it makes it memorable. Impact management could be our use of Steven Seagal and Chuck Norris, right? It gets you thinking, it's a word play, and sometimes people are at least influenced that way.

Coercion is the closest thing to power in the influence category, it means that you're going to leverage somebody in a very unpleasant way to get them to see your side. If you have power, you can use this, but remember, your gains are very short-lived if you are using coercion.

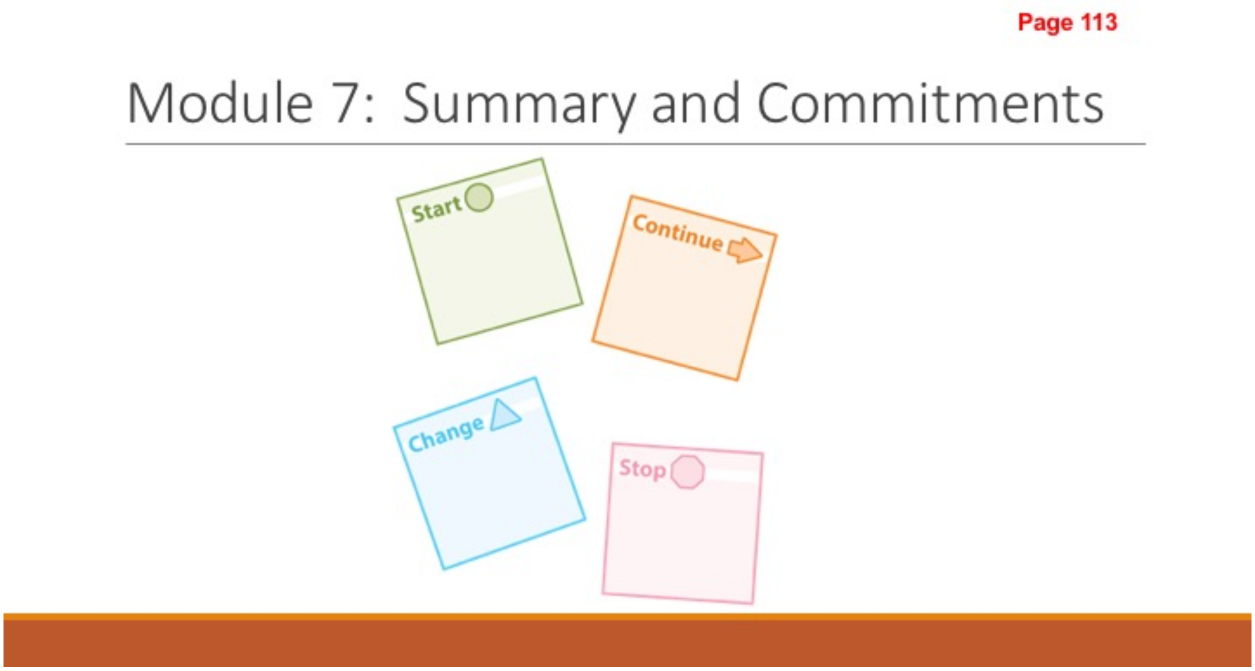
Then, there's the next three which kind of run together. The first is organizational awareness, and what this means is that I am kind of looking at who the power players are in the organization, I'm identifying them. The second step is interpersonal awareness, I want to figure out what's important to them, so that I can network with them. That's where the third piece, relationship building, comes in. Now, I'm working to establish a relationship, so that later on at some point, I can rely on that relationship. Those three run together, but you've got to start by knowing the organization. This is where you can build your proxy power. You can see where these things really go together.

Last one there is bargaining. It is your ability to exchange currencies to get things. If we think about in the movie Shawshank Redemption, Red was the guy who would get things, he had bargaining influence and he had a power that came from that.

You get people to finish up their scoring, total those up. In module eight, then, we are going to revisit those as we work together to figure out how to navigate and leverage organizational politics.

**Points to Cover:**

The video walks through the definitions of all of these and gives examples. Feel free to use your own examples if you have them.




There really shouldn't be a whole lot in the summary in commitments here, but you can certainly give them time to take notes if you want. Then, because this one goes fairly quickly, you probably could just step right into module eight.

We'll go ahead and visit module eight together.

**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

Page 115

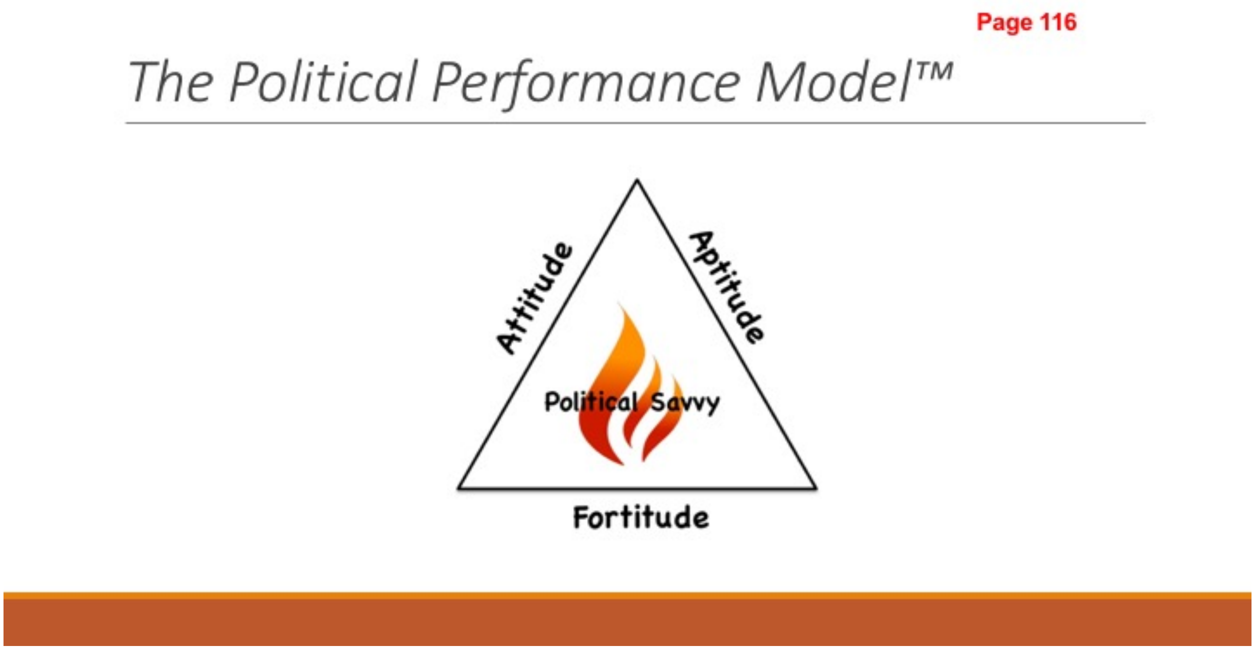

*Well, welcome to the final module of Driving Results. This is module eight, Navigating Organizational Politics, and we chose to add this to the end of the program because this is really where I think people in your class are going to have to put into practice everything that they've learned up to this point.*

*If we go back to the original model of solving system problems and process problems, and then the protecting the house and developing people, this is where all three of those come together. And so the way to start this module off is to have your groups, say, "I'm going to give you five minutes and I want you to come up with a consensus definition for organizational politics." And so tell them everything is on the table. They can Google it, whatever, you can talk from personal experience, giving them five minutes, and then when it's over with, tell them just to keep their definition and sit quietly. So you'll give them the five minutes, and then you'll go ahead and open up into the first slide of this module, and it's what we call the Political Performance Model.*

**Points to Cover:**

This is the final module of the program.  It's designed to show participants how they can navigate organizational politics to get what they and their team needs to be successful.  We score the assessment from the previous module and end with a case study.

Begin this module by having the audience work in groups and come up with a consensus definition for ORGANIZATIONAL POLITICS.  The can use whatever resource they have to come up with it. We will revisit their definition in a few slides.




*Now, this looks very, very similar to what you saw earlier, the module on what the boss needs to do, so it's back to the fire triangle. But what we're looking at here then is the three components that give somebody what we call political savvy. Now, already some of your audience is going to say, "I don't want political savvy. I don't feel good about that." We're going to get there.*

*So there's three components. The first one is what we call your attitude toward organizational politics. That's how you feel towards them. The second is your aptitude. Your aptitude is your ability. It's kind of like your skill on the three legged stool through upgrade performance in actually navigating politics. The third is what we call the fortitude. The fortitude is kind of like your willingness to engage, your emotional and strength in doing it. Now, all of those must be developed, and what we're going to do is we're going to actually talk a little bit more about the attitude.*

**Points to Cover:**

This model (similar to the Great Boss model from Module 1) shows attendees that political savvy is a combination of knowing how to navigate politics, having the right attitude towards politics, and having the willingness to tackle organizational politics.

Page 117

## Political Attitudes

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Politics are irrelevant. Merit is everything. | Politics are dirty and manipulative – only sharks do them. | Politics aren't me. I don't do them. | Politics are necessary sometimes. I do it only when I have to. | Politics are how things get done. I'm an active and willing player. |

*So the way I like to start this next slide off with this activity is tell everybody in the room to shut their eyes, and then you can say, "If your eyes are already closed, just leave them closed." That's always good for a laugh. But what you want to do then is have them close their eyes and then you're telling them that you are going to read one of five different political attitudes, and when you have said the one that they agree with, have them just slip up their hand and put it back down. It'd be up to you to count now, so pay attention.*

*So here's attitude number one, attitude number one. Remember, their eyes are closed now. Is, "Politics are irrelevant, merit is everything. So if you believe that there's no such thing as politics, everything is based on merit, let me see your hand." So when you see them, make a little note in number one of how many hands. Here's the second mindset: politics are dirty and manipulative, only sharks do that. That's sharks, negative sharks, right? Not like ones we talked about in module two. So let them know, "If this is how you feel about politics, go ahead and slip up your hand," and then count them. Here's mindset number three, attitude number three: politics aren't me, I'm just not going to do it. Ask for a show of hands. "How many of you feel this way?" Here's number four: politics are necessary sometimes, I do it only when I have to. That's mindset four. You'll probably see a few more hands here. Last one is mindset five, attitude five: politics are how things get done, I'm an active and willing participant. If that's how you feel, let me see your hand.*

*So now quickly do the math, and you kind of get a sense for how people feel. I like to do it with the eyes closed because that way you don't feel subconscious. So before you tell them what the right attitude is, let's go back and have them give you their definition of organizational politics. So you're going to find a whole wide range. There'll be things that are like the real negative ones, and so when you have them read it, ask the group, "Where do you see this on page 117 as the political attitude?" Truthfully, most of them are going to fall in attitude number two.*

**Points to Cover:**

Use this as a brief activity. Have the audience close their eyes and raise their hands when they hear the political attitude they feel most aligned with. Start with # 1 and work over to #5. Take a hand-count for each one. We have them close their eyes so feel comfortable being honest in their answer.

Now, have the groups read their definitions. Ask them which of the 5 attitudes they hear in each definition.

Then, let them know that the most helpful attitude is #5, as depicted in the next slide....

Page 118

## Politics Defined

***The use of <u>POWER</u> and <u>INFLUENCE</u> to develop relationships and navigate systems to get things done.***

*Once you've done that, then it's time to let them know that the correct attitude toward politics is in this definition, and this is how we define it. It's the use of power and influence to develop relationship and navigate systems to get stuff done. This, by the way, is mindset or attitude number five. And so again, many of them are going to feel like, "No, I don't believe it," so this is a good time to have a discussion on why politics get such a negative connotation, and so you can ask them, "How many of you have ever been burned by internal organizational politics?" And many hands will go up. And then ask them, "What is it like around election time when the commercials come on TV?" They're negative. There's attack ads. You hear about Congress and how nobody can get along and everybody's undercutting everybody.*

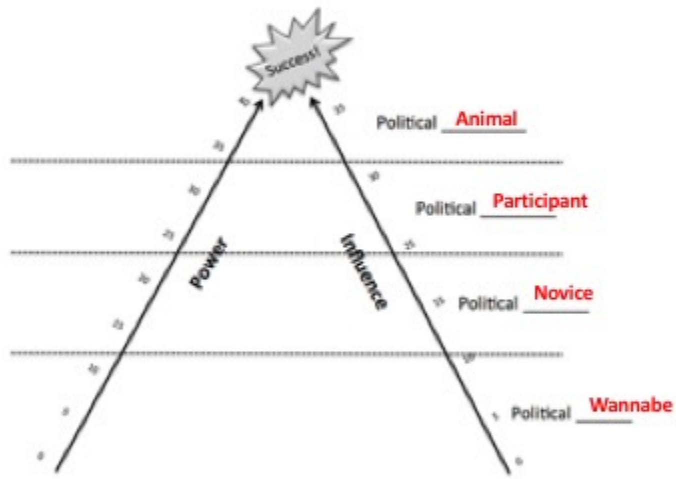
*And then think about reality TV, right? Whoever gets voted off the island or voted out of the house, it's all because of somebody's alliance, and so let them know that that's the negative part of politics. But if you're going to truly be a great boss, you have to use your power and influence to get what your team needs to get stuff done, so you have to be that active and willing participant. Then I want you to ask the group then, say, "Listen, how would you feel if you needed your boss to step up and play politics and they refused to do it? What kind of respect would you have for them?" And they will probably agree they would not have respect.*

**Points to Cover:**

This is the definition of politics you'll use. It reflects Attitude #5. The Boss needs to embrace it if they want to be successful. You might get push-back here. If so, ask the person if they would respect their Boss if they chose Attitude #1 or #3 if what you wanted might result in your success at work. They have to operate from that perspective.

Page 118

# Politics Defined




**Points to Cover:**

Now have attendees score their assessments from the previous module. This gives them an idea of where they need to grow.

*Once you've done that, then it's time to let them know that the correct attitude toward politics is in this definition, and this is how we define it. It's the use of power and influence to develop relationship and navigate systems to get stuff done. This, by the way, is mindset or attitude number five. And so again, many of them are going to feel like, "No, I don't believe it," so this is a good time to have a discussion on why politics get such a negative connotation, and so you can ask them, "How many of you have ever been burned by internal organizational politics?" And many hands will go up. And then ask them, "What is it like around election time when the commercials come on TV?" They're negative. There's attack ads. You hear about Congress and how nobody can get along and everybody's undercutting everybody.*

*And then think about reality TV, right? Whoever gets voted off the island or voted out of the house, it's all because of somebody's alliance, and so let them know that that's the negative part of politics. But if you're going to truly be a great boss, you have to use your power and influence to get what your team needs to get stuff done, so you have to be that active and willing participant. Then I want you to ask the group then, say, "Listen, how would you feel if you needed your boss to step up and play politics and they refused to do it? What kind of respect would you have for them?" And they will probably agree they would not have respect.*

*So that's what we're going to navigate from. Now it's time to see how they shake out on their assessment. So what we're going to do here is have them total up the numbers in both the power and then the influence grid that they did in the previous chapter, and then plot them. And so you'll find that they, generally speaking, fall together. So somebody that has like a 20 in power might be what we call a political novice, and like the ones*

*that are really low are the wannabes. Most people you're going to find are probably going to be maybe in the participant or novice range, and just let them know that the idea here is to get good enough to where you can become the political animal for the good, right? The good reason. And then if you want, you can kind of share the numbers from the activity when they picked their own attitude, and they may find that to be surprising.*
*So let them know that the thing here is that we've got to realize we've got to prepare ourselves to navigate politics, and then once we make the decision we're going to do it, it's time to get busy, which is what's going to lead us to the case study.*

Page 119 - 122

# Navigate Organizational Politics

ACTIVITY #16

**Points to Cover:**

This is the final activity of the program. Have the audience break up into groups. Give them 15 minutes to read the case study and work together to come up with a strategy to help Harvey get his product approved by the product committee. Show the next slide as a help.

*Now, the case study is navigating organizational politics. It's a case study, it's fictitious, but it's going to let them see in kind of an exaggerated form what it's like when you have got to get a win for your team.*

*So briefly setting it up, it is a guy named Harvey Hatfield, and what he's got is this device, this medical device that he needs to get pushed through to get funding from the product committee. He's had kind of a rough year. He's not very confident. His team is relying on him. And so what you'll do, and this is how we do it, this is in their books by the way, is say, "Listen, I'm going to give you about 15 minutes in your group to read the case study and then answer the questions that are on page 122 of that." So the questions are, what's Harvey's biggest challenge right now and what's the root cause of his problem? Well, the challenge is he needs to get funding and approval for this, his root cause is that he has just not navigated politics, he's just played it safe, and now his job and his division's jobs are in danger of being lost.*

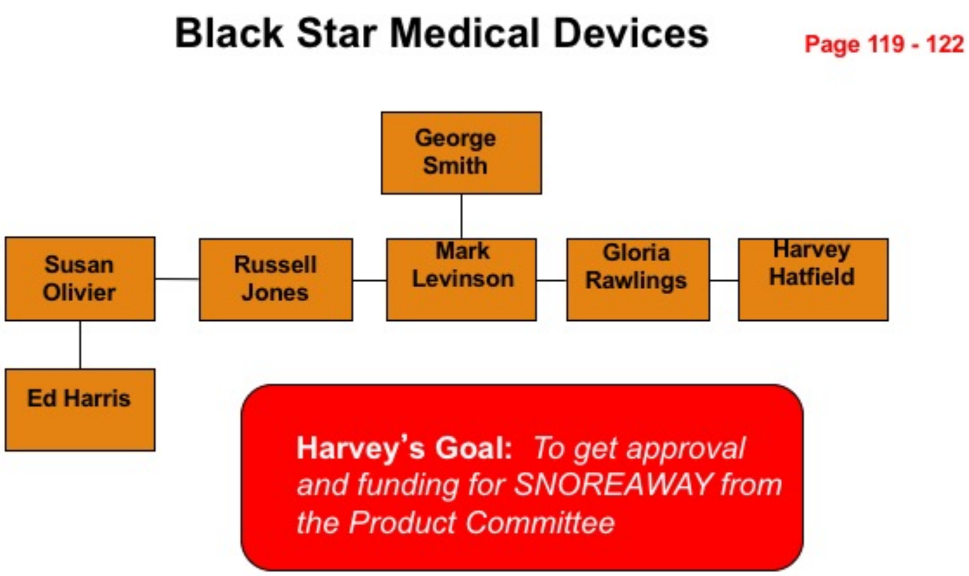
*So question two, what should Harvey do? And let them just at a rudimentary level see to figure out a strategy. Then we're going to give them the tool. And then the third question is, will your suggestions work? If not, how can you head off the obstacles? So you're going to see now we can pull those prior tools, what would have to be true in the pre-mortem on their ideas.*

*So go ahead, let them have the time. Usually it takes about seven minutes to read, eight minutes to get a good discussion going. There's a little bit of humor in this, and what they're going to find is that there's a lot of issues going on in this organization. And so what will help, and you can give this to them, this is on the next slide, this is an org chart of Blackstar Medical Devices. Just go ahead and leave this up on the screen, and then you've got Harvey's goal there in red, just as a reminder there. He needs to get approval and funding for Snore Away from* *the product committee. And then, when the time is up, then go through the questions and see what they come up with. Most of the time they'll say, "Well, we need to go through Susan and we need to figure out how to influence Russell," and so you'll get some really good answers. It's a fun case study because even though the products are ridiculous and exaggerated, the dynamics are not, and I suspect many of them will have experienced this before.*

*So once you've gone through, then I guess the key is let's give them a better tool. So this is really the last tool that you're going to have. There's two parts to the political strategy grid. Now, the first part is to name the players. So the players are all the people in that case study, Gloria and Kevin and all these people. So the first thing you do is decide, are they for me or are they against me? And you have to be brutally honest here. Now, the second part is that you have to define their wants and needs. This goes back to what we learned back in module two. Remember, on the WhineBuster tool, what do you want, but what's most important to you? This is for you as best as possible to try to identify these.*

*Now, the third things, third and fourth, is you have to list your power and your influence that you have against that person in that right then, and then the last part of it is to determine the decision status. So there's three ways you can determine. Number one is they're locked in. It means they are not changing their mind. Your hope is that they're on your side, but if not, it might be best to play live to fight another day. The next one is actively deciding. This one, generally speaking, you can do nothing about. This is kind of like what happens when a jury goes to deliberate. All right? They're deciding. There's no more evidence that can be entered in. They can only get clarification. But when a person needs more information, that's where you want them to be, because then, based on the way they're wired, you might use your different influence strategies. Maybe you're going to use logical persuasion.*

*So what this does is it sets the playing field where then you can put the strategy together to see if you can get things done. So step number one on part one is to list out all the info you have. Now, step two then is, with each player, step one, step two, step three, step four. What you'll find and what they'll find is that, even without going through this tool, they've probably done something very similar at their first crack at solving this, but what this tool gives you is a nice structured way to get that information out there, and let them know as you wind this up, "This will not work if you don't have the will to get this done, and this is where if you have the mindset that politics isn't me, I don't want to play, seriously question your ability to do the role of the boss because your team is depending on you to get this done."*




**Points to Cover:**

This is an Organizational Chart for Black Star. It shows a fairly flat organization so Harvey won't be able to rely on Position Power.

When time expires, have the groups read out their solutions. Most will involve going through "friendly" people to influence the Product Committee.

Then, refer them to the next two slides and the pages in the workbook. This is a strategy tool they can use to help them think through this when it happens in real life.

Page 123

# Political Strategy Grid (Part 1)

| Player | Position | Their Wants | Their Needs | My Power | My Influence | Decision Status<br>- Locked-in<br>- Actively Deciding<br>- Needs more info |
|---|---|---|---|---|---|---|
| | For / Against | | | | | |
| | For / Against | | | | | |
| | For / Against | | | | | |
| | For / Against | | | | | |
| | For / Against | | | | | |
| | For / Against | | | | | |

**Points to Cover:**

This tool helps sort out the players and where they stand. It also demonstrates what power and influence strategies you will need to use. Finally, you can determine whether you should concentrate on certain individuals based on where they are in the decision cycle.

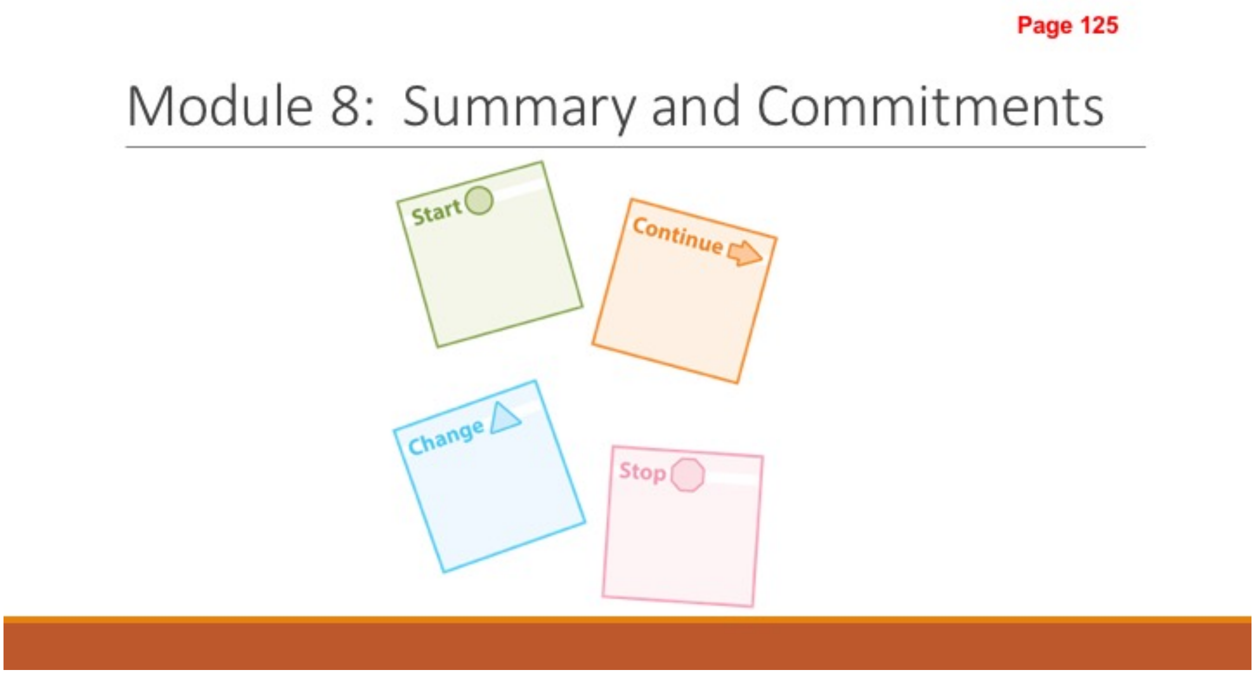
Page 124

# Political Strategy Grid (Part 2)

| Player | Step #1 | Step #2 | Step #3 | Step #4 | Step #5 |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

**Points to Cover:**

Part 2 is where you list out your steps based on the assessment you did in Part 1.




**Points to Cover:**

Give attendees about 5 minutes to identify ways they can be more effective as The Boss by what they will START doing, CONTINUE doing that is working, CHANGE something they are doing, or STOP doing something that isn't working.

# Done!

Downloadable tools at:

***www.thebossbuilders.com/helps***

Podcast:

***www.BossBuilderPodcast.com*** **or on iTunes, Google Play, and Spotify**

*Well, once you've gone through that tool and wrapped up, that takes us to the end of the program, and so they can do a final set of summary and commitments. This is where, if you have an evaluation, you can pass out the evaluation and ask them to be honest in there. The key with evaluations too, just as a side note here, is the smile sheets that you pass out afterwards, those are nice. They give you feedback in the moment on how to improve the next time you teach it, but they ultimately aren't going to make a bunch of difference. It's going to be what they can remember three months from now, and that's why we highly recommend that you get them together once a month for a management round table. We have provided you a link to a resource where you have 24 pre-packaged lunch and learn round table topics that you can facilitate, and when you facilitate these, tell them, "Bring your workbook with you to the round table. Let's just spend one hour together. It's a chance for you to bring your questions, and then we'll use the tools in the program and anything else to go back and work on these so that you can continually grow and continually be successful as the boss."*

*So as a final note here, there is a download sheet, a download link at thebossbuilders.com/helps. Many of the tools in the course are there. They can go there and pull those down anytime and use them. There is also, for their further review, there is our podcast that we have here at Boss Builders, The Boss Builder Podcast. You can find it at bossbuilderpodcast.com or on any tool that you listen to your podcast through. We interview people who we consider to be boss builders who are going to share even more information. The key here is continuous growth. Having a successful training event, if you even have it, is only the beginning. It's what you do from here on out to lead these people to a position where they can lead others. That's the most important thing you do with this program.*

*I hope this is helpful. If you have any questions or need any help, you can always reach us at thebossbuilders.com or call us at 931-221-2988. Best of luck as you deliver this program, and we are excited to hear what happens as you have a successful classroom. Thanks for tuning in.*

**Points to Cover:**

Let the group know that the learning will continue. You will have access to 24 Management RoundTable lesion plans and we recommend you bring the group together for an hour every month to revisit the material and facilitate solutions using the information from this course.

You can also direct them to post-course surveys if you have them and ask for feedback in the room.

Finally, let them know there are free tools and guides they can find at www.TheBossBuilders.com/helps. You can access as a facilitator in the learning portal which you will get access to via email.