



# Leadership @ Every Level


## Developing a Foundation

Participant Workbook





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# Section 1

## Introduction; Head, Heart and Guts Leadership





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## Executive Sponsor Video



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## Developing a Foundation Learning Objectives

### Create more value for Pfizer and customers by:

- Translating business strategy into the specific execution required from your team
- Making timely and sound decisions

### Drive team effectiveness and engagement aligned by:

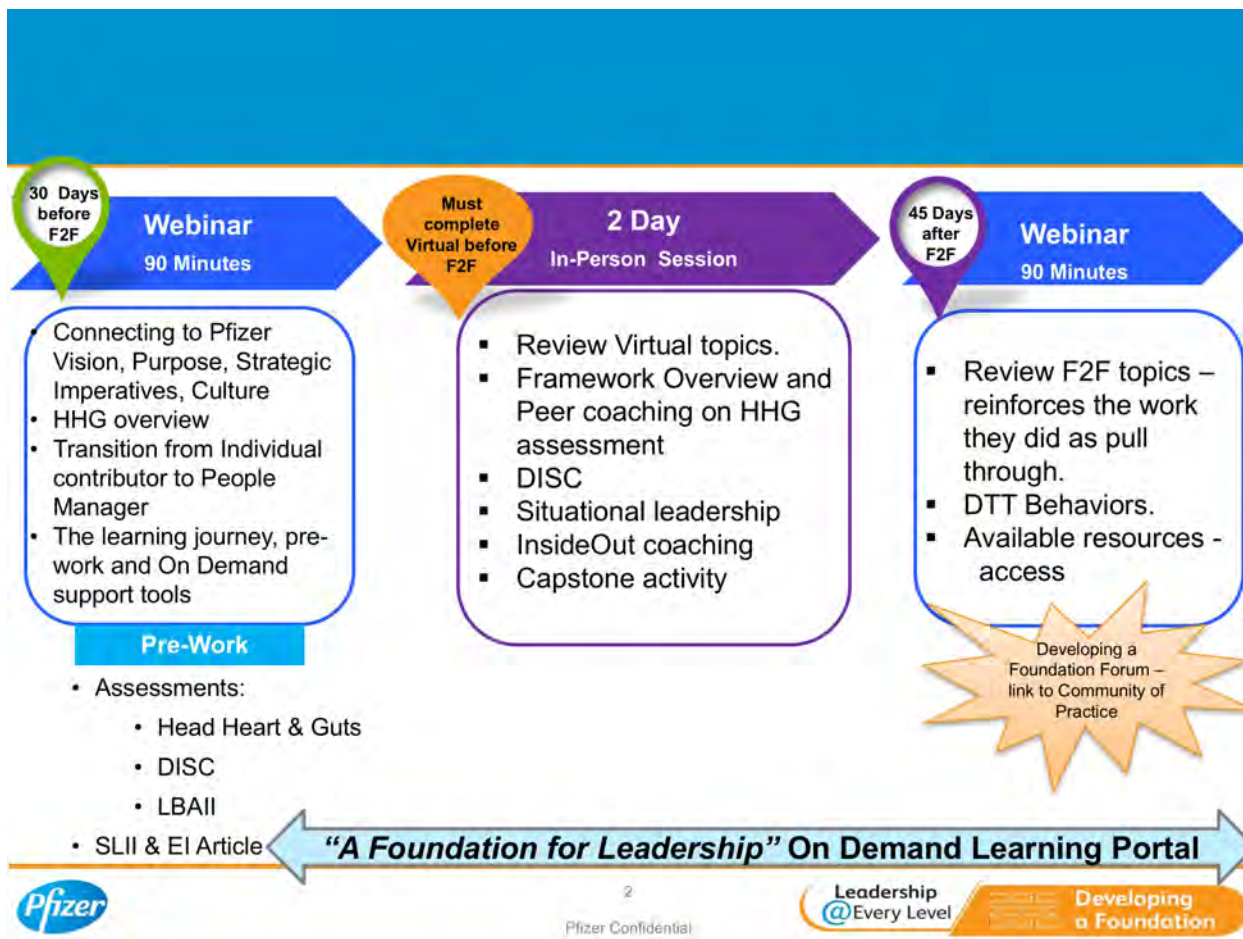
- Applying emotional intelligence and self awareness to adjust your leadership styles and behavior to achieve optimal results with your team, your peers and your leader
- Managing your team in getting their work done effectively and engage colleagues through effective performance management and career coaching
- Leveraging team members' strengths, develop their capabilities and support them in career planning

### Embrace conflict and risk necessary for success:

- Manage the ambiguity of a changing Pharma environment with speed, agility, resiliency and decisiveness
- Foster an innovative culture that enables risk taking



## Program Overview



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## Activity: 10 Minutes

### Leadership Bingo

- Read the descriptions on the leadership Bingo handout and pick at least three that would describe you.
- Find individuals in the room that match a description on a square of the handout.

When you find a match, write individual's name in the square. Fill as many squares as possible in the time allocated.

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## Leadership Bingo Board

Has had a fantastic Leader	Has been at his or her job less than a year	LOVE HIS OR HER JOB	MANAGES MORE THAN SIX PEOPLE	Is a good listener
LOVES CHANGE	Has the same first initial as you	HAS THE SAME BIRTHDAY MONTH AS YOU	Speaks another language	HAS HAD A BOSS THAT COULD BE A MODEL FOR HOW NOT TO BE A BOSS
Has learned a new sport within the last year	LIKES THE PACE OF HIS OR HER WORK	HAS BEEN IN ANOTHER COUNTRY WITHIN THE LAST SIX MONTHS	Has specialized in writing performance evaluations	Has read a book in the last month
LIKES TO WATCH TENNIS	Wants to be a better leader	HAS TWINS IN HIS OR HER FAMILY	Has a shoe size bigger than yours	Sees self as a great problem solver
Can alter a Web page	Has been disillusioned about a task but persevered and was successful	Has a love of learning	Has met a Famous Celebrity	Is a manager who focuses on catching people doing things right



## Day 1 Objectives

**Head Heart & Guts** Framework Overview and Peer coaching on Head Heart & Guts assessment.

Build your self-awareness and insight on impact of your interpersonal communication through **DISC**.

**Situational Leadership II** to balance the use of your leadership behaviors, identifying what is most effective for specific situations.

### Agreements

- **Actively participate:** Be open, ask questions, respectfully challenge each other.
- **Come with a development mindset:** Think not only about your development, but the development of your peers and your team.
- **Connect with each other:** The greatest learning comes from working with your colleagues.
- **Practice trust and confidentiality:** Honor each other's honesty about what is happening in your world.
- **Be on time:** Please arrive on time to ensure that we end on time.
- **Turn off electronics:** Avoid using phones and laptops.
- **Complete pre/post-work:** You will learn about post-work at the end of the day. The post work is designed to help you apply the content, gain new experiences and prepare you for the next session.



*Leadership @ Every Level* is the next step on our cultural journey which builds on the strong foundation of Straight Talk, Dare to Try, and Accountability



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## Whole Leaders Use Head, Heart, and Guts by Demonstrating the Following Six Behaviors



### HEAD

#### Decisive

Manage complexity to make timely, informed decisions

#### Focused

Develop impactful short and long term solutions for our customers and patients



### HEART

#### Connected

Collaborate with others to accomplish shared goals

#### Inspiring

Motivate and develop self and others to drive the business forward



### GUTS

#### Courageous

Consistently demonstrate accountability and integrity in the face of challenges

#### Resilient

Respond to change with agility, optimism and innovation

### Function-Specific Behaviors



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### HEAD



## Leaders who use their Head are: Decisive and Focused

### Decisive

Manage complexity to make timely, informed decisions

- ☐ Synthesizing information
- ☐ Demonstrating good judgment
- ☐ Enabling effective decisions

### Focused

Develop impactful short and long term solutions for our customers and patients

- ☐ Demonstrating strategic mindset
- ☐ Identifying creative solutions
- ☐ Focusing on customers and patients

### Potential Pitfalls of Overuse:

- Overthinking problems or opportunities
- Driving for performance without inspiring other values
- Missing opportunities to consider other perspectives and build trust
- Failing to develop leadership bench strength
- Avoiding conflicts or difficult issues



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HEART



Leaders with Heart are:  
**Connected and Inspiring**

**Connected**

Collaborate with others to accomplish shared goals

- ☐ Building internal & external relationships
- ☐ Inviting diverse perspectives
- ☐ Promoting a One Pfizer mindset

**Inspiring**

Motivate and develop self and others to move the business forward

- ☐ Energizing self and others
- ☐ Recognizing effort and achievement
- ☐ Driving learning and development

**Potential Pitfalls of Overuse:**

- Letting compassion get in the way of tough decisions
- Difficulty making disciplined decisions at the right time
- Unable to say "no"
- May not stand up for what they believe in



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GUTS



Leaders with Guts are:  
**Courageous and Resilient**

**Courageous**

Consistently demonstrate accountability and integrity in the face of challenges

- ☐ Addressing difficult issues candidly
- ☐ Aligning words with actions
- ☐ Holding self and others accountable

**Resilient**

Respond to change with agility, optimism and innovation

- ☐ Leading and supporting change
- ☐ Adapting to new conditions
- ☐ Learning from mistakes

**Potential Pitfalls of Overuse:**

- Placing too much emphasis on own opinions
- Unwilling to be challenged
- Acting without anticipating tradeoffs or consequences
- Failing to connect with others during change



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## Head Heart & Guts 360 Assessment overview

### Head Heart & Guts 360 Assessment overview

Head, Heart and Guts  
360° Feedback Report

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John Don  
2/24/2017

- To provide developmental feedback related to Pfizer's Leadership behaviors and derailers; increase awareness and improve behavior
- Input measures your effectiveness against the three key areas of leadership :
  - Head
  - Heart
  - Guts

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## Reading & Understanding your Report Table of Contents

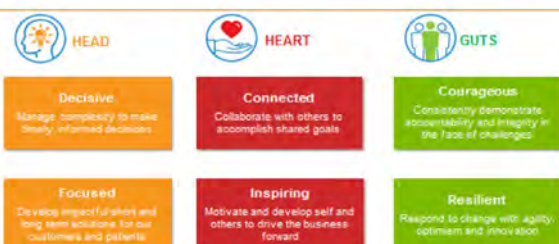
About Your report
Interpreting the report
Head, Heart & Guts behaviors scoring overview
Top 5 and Bottom 5 items based on average score
Detailed scoring per item
Hidden Strengths and Blind Spots
Open Ended Comments







## About Your Report



### Your Respondents

The following respondents were invited to participate in your developmental 360° feedback.

Number of evaluators invited:	10
Number of evaluations received:	10
Number of Manager evaluations received:	5
Number of DirectReport evaluations received:	5
Number of Peer or Other evaluations received:	5
Number of Self evaluations received:	1

### Rating Scale

This assessment used the following rating scale when raters provided their feedback.

Ineffective (Needs Fundamental Change)	1
Less Effective (Needs Improvement)	2
Effective (Comparable to Most)	3
Very Effective (Better than Most)	4
Extremely Effective (Role Model)	5
Not Observed (No Rating)	X



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## What does this report suggest about your strengths?

- Examine your High Scores list (pg 7) and Hidden Strengths (pg 14) to determine your strengths. Read through the open ended comments to further understand your strengths (pg 15-16).
- Pick 1-2 strengths that you can leverage and build upon.

## What does this report suggest about your opportunities?

- Examine your Low Scores list (pg 7) and your Blind Spots (pg 14) to identify your opportunities.
- Read through the open ended comments to further understand your opportunities (pg 15-16). Colleagues often include suggestions or solutions in their comments that can be helpful.
- Pick 1-2 topics where you will invest extra effort to improve your performance.



## What can be learned from different feedback provider perspectives?

- Examine the bar charts in the scoring overview section (pg 4-6). Identify any large rater group differences (e.g. >1 point).
- Examine the bar charts in the item detail section (pg 8-13). Identify any notable patterns/differences in ratings across groups. (e.g. >1 point).
- Consider these questions: Overall, is there agreement in the ratings across groups? Is there a group or groups which tend to have consistently higher/lower ratings? If so, what might that suggest?

## Create a Development Plan

- Consider the overall themes in your results. What are 2-3 areas where you would like to improve? What could you do more of? Less of?
- Identify a SMART (Specific, Motivating, Attainable, Relevant, Trackable) goal for each area. Make sure to determine key actions and milestones. Be as specific as possible.
- Discuss your results with your Manager and/or your team. Solicit their input in creating your plan and share your goals with them.

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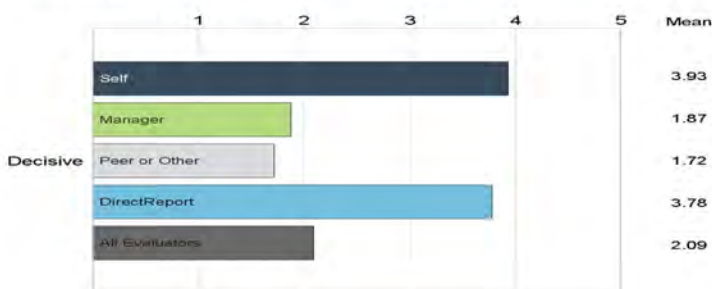
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## Overview Leadership Behaviors Scoring



Decisive: Manage complexity to make timely, informed decisions



Focused: Develop impactful short and long term solutions for our customers and patients



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Notes: \_\_\_\_\_

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## High & Low Scores

This page contains your top 5 items and bottom 5 items based on average score.

Highest Scores			
Rank	Scoring Category	Item	Average
1	Inspiring	Provides constructive real-time coaching to colleagues.	4.28
2	Resilient	Finds solutions and makes decisions despite incomplete information.	4.27
3	Inspiring	Challenges self and others to achieve results and consistently raise the bar of expectations.	4.23
4	Connected	Promotes healthy debate by encouraging others to stay open to, seek and learn from diverse perspectives.	4.17
5	Focused	Demonstrates understanding of and acts to promote the long-term, big picture view of the business.	3.98

Lowest Scores			
Rank	Scoring Category	Item	Average
1	Courageous	Shows consistency between words and actions, gaining people's trust and respect.	1.64
2	Resilient	Adapts or shifts priorities in response to the needs of clients, constituents, or the organization.	1.70
3	Focused	Develops and pursues strategies that will create sustainable value.	1.81
4	Focused	Holds self and others accountable for consistently meeting needs of customers and stakeholders.	2.14
5	Courageous	Demonstrates conviction in own ideas, even when they are unpopular.	2.54



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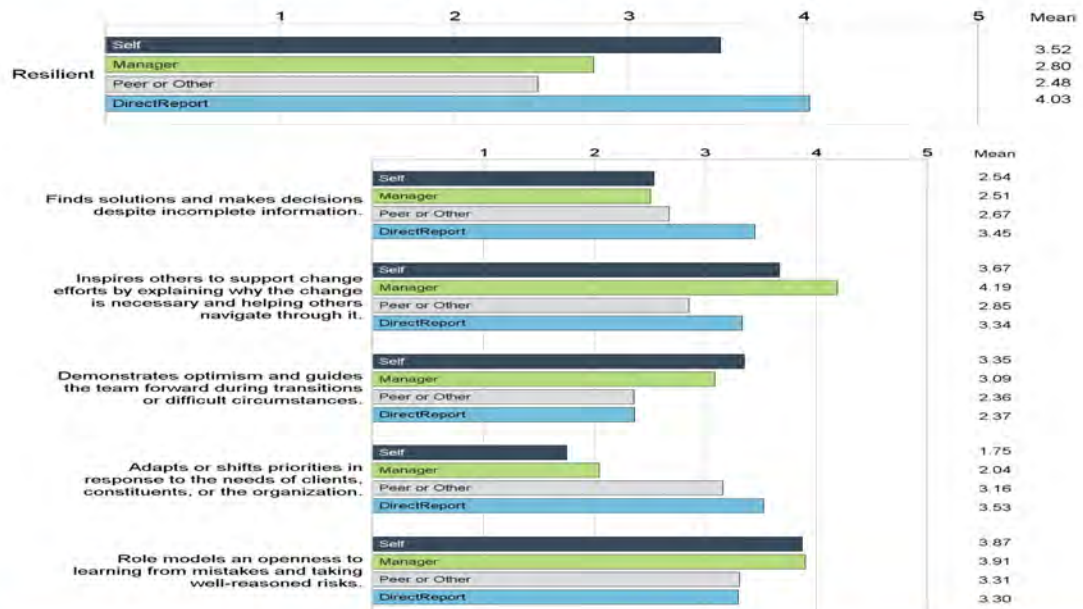




## Detailed Item scoring



Resilient: Respond to change with agility, optimism and innovation



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Notes: \_\_\_\_\_

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## Positive and Negative Gaps

This page indicates whether your Self rating is significantly different from the perceptions of your other feedback providers.

- Positive gaps where evaluators rate you at least 1 point higher than your self rating are **hidden strengths**.
- Negative gaps where evaluators rate you at least 1 point lower than your self rating are **blind spots**.

Positive Gaps				
Rank	Scoring Category	Item	All Evaluators	Self
1	Resilient	Demonstrates optimism and guides the team forward during transitions or difficult circumstances.	3.10	1.63
2	Resilient	Inspires others to support change efforts by explaining why the change is necessary and helping others navigate through it.	2.97	1.74
3	Connected	Builds effective professional relationships with internal and external stakeholders and decision makers.	2.85	1.71
4	Resilient	Role models an openness to learning from mistakes and taking well-reasoned risks.	2.82	1.69
5	Courageous	Addresses difficult issues directly with courage and candor.	3.90	2.81

Negative Gaps				
Rank	Scoring Category	Item	All Evaluators	Self
1	Focused	Develops and pursues strategies that will create sustainable value.	1.81	4.39
2	Connected	Articulates and emphasizes the team's shared goals and purpose.	1.61	4.15
3	Resilient	Adapts or shifts priorities in response to the needs of clients, constituents, or the organization.	1.70	3.08
4	Connected	Connects with colleagues of all backgrounds by taking a genuine interest in their needs and concerns.	3.43	4.39
5	Focused	Holds self and others accountable for consistently meeting needs of customers and stakeholders.	2.14	3.01



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## Open Ended Comments

- What behaviors should the colleague continue to demonstrate to ensure success going forward?
- What behaviors should the colleague develop to ensure success going forward?



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Notes: \_\_\_\_\_

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## Activity: 20 Minutes

### Peer Coaching

- Objectives
  - Engage in dialogue with trusted peers who can help you think through the implications of your data
- Meet with your peer coaching pairs to think through the implications of your data
  - Take turns discussing your key insights from your HHG 360 Assessment
  - Reflect on the data in relation to your business context
    - What elements of your results do you think most support your situation?
    - How does that compare with how you rated yourself?

## Section 2





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## Emotional Intelligence - The four EI skills



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## Why EI is critical now?

- Knowledge and relationships are the currency of the new economy.
- Relationships are the way we get things done at Pfizer
- EQ links to job and bottom line performance
- Changes in the "emotional" brain are possible
- It always has been



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## DISC: Head, Heart & Guts



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## Objectives

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## Activity: Reflection on my Experience

- Individually respond to the following:
  - List 3 qualities/behaviors that you most respect in people:

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- List 3 qualities/behaviors that most frustrate you in people:

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- Describe the behaviors of the best team you were ever on:

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- Create a phrase that describes what your philosophy of life is:

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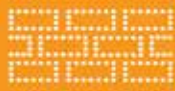


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- Debrief at your table



## What is DISC

- DISC is a quadrant behavioral model based on the work of William Moulton Marston PhD (1893-1974).
- Group characteristics of behavior into four major 'temperament' styles.
- Each DISC type brings its own unique value to the team.
- A system used to explain behavior in a way that 'opens' a doorway of communication.
- A universal language that is easily observable.
- A measurement tool that identifies the needs-driven motivation portion of our behavior.
- DISC is one of the most highly validated instrument of this kind.

## What DISC is not

A measure of...

- Intelligence
- Experience
- Skills
- Education
- Values
- Mental Health

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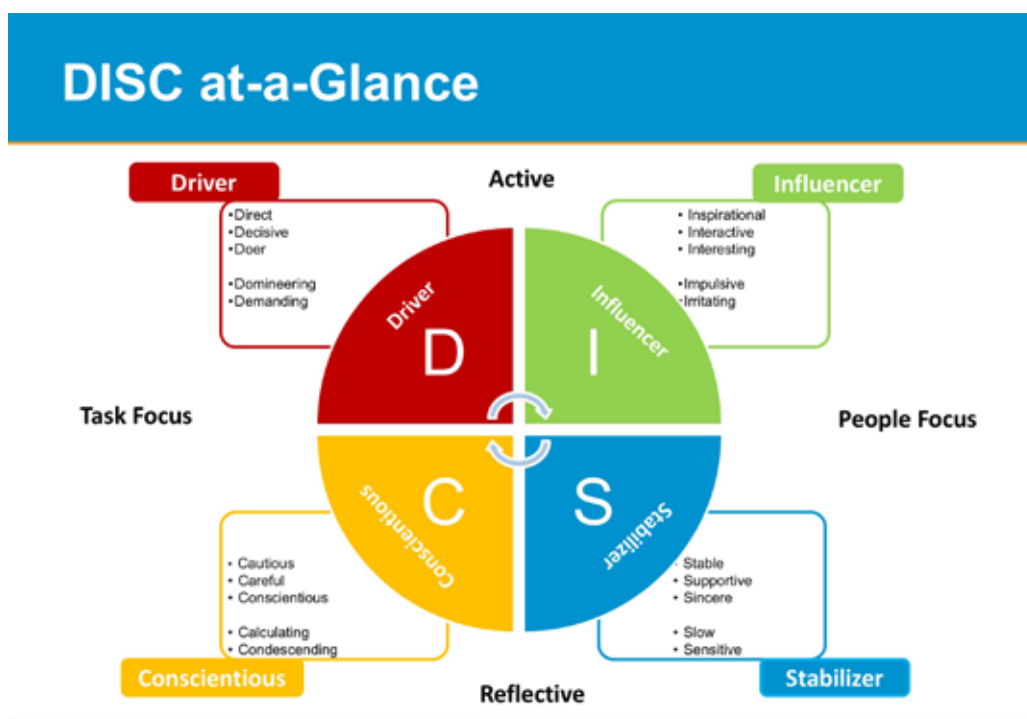


## Details of DISC

DISC is a model that describes your way of doing things within the context of 4 behavioral quadrants:

- **D** – How you respond to change & challenges
- **I** – How you influence others
- **S** – How you respond to the environment around you
- **C** – How you respond to rules & procedures

**The model describes the style of how you do things**



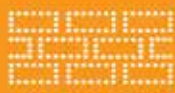
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## Task Line

**D** – Driver


**I** – Influencer


**C** – Conscientious


**S** – Stabilizer


This is what motivates you, what you need and what makes you uncomfortable when it's not in place.

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## Activity: 10 Minutes

### The Players

In this video you will see people at work



Try to determine who possesses which Temperament

- Who was the High I...
- Who was the High S...
- Who was the High C...
- Who was the High D...

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### Activity:

Please reflect at table level...

What are the potential Assets and Roadblocks for each temperament?

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## Potential Strengths of Each Temperament

**D** – Driver

**I** – Influencer

**S** – Stabilizer

**C** – Conscientious

**Tell** – Would be more effective if they “asked” and listened

**Ask** – Would be more effective if they shared their perceptions

What?	Who?	How?	Why?
<ul style="list-style-type: none"> <li>• Decisive Action</li> <li>• Takes Charge</li> <li>• Gets Results</li> <li>• Self-Confident</li> <li>• Independent</li> <li>• Assertive</li> <li>• Risk Taker</li> </ul>	<ul style="list-style-type: none"> <li>• Fun Loving</li> <li>• Enthusiastic</li> <li>• Optimistic</li> <li>• Good Communicator</li> <li>• Smooth’s Conflict</li> <li>• Network</li> <li>• Resource Finder</li> <li>• Emotional</li> </ul>	<ul style="list-style-type: none"> <li>• Patient</li> <li>• Easy Going</li> <li>• Good Listener</li> <li>• Team Player</li> <li>• Calming Influence</li> <li>• Stability</li> <li>• Systematic</li> </ul>	<ul style="list-style-type: none"> <li>• Accurate</li> <li>• Analytical</li> <li>• Detailed</li> <li>• High Standards</li> <li>• Critical Judgment</li> <li>• Intuitive</li> <li>• Controlled</li> </ul>

## Descriptions of the Styles

**D’s** Are strong-willed, strong-minded people who like challenges, taking actions, and getting immediate results. They tend to focus on the bottom line and results.

How to connect with a High “D”:

If you have to interrupt them while they’re working, tell them:

- 
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**I's** Are 'people people' who like participating on teams, sharing ideas and energizing and entertaining others.

How to connect with a High "I":

If you have to interrupt them while they're working, tell them:

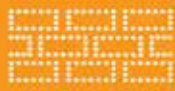
- Let them express themselves.
- Yes, they'll probably digress into a story, but it helps them get connected with you.
- At the proper point, you can 'digress'em' back to the topic at hand.

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**S's** Tend to be helpful team players who like working behind the scenes, acting in consistent and predictable ways. They tend to be good listeners.

To connect with High "S" people:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



**C's** Tend to focus on quality, plan ahead, employ systematic approaches and constantly check for accuracy.

To connect with High "C" people:

- Have your homework done.
- Don't criticize their work.
- If you have to critique them, use the Criticism two-step:
  - Appreciate their efforts.
  - Ask if they think your suggestion (or idea) would be an improvement.

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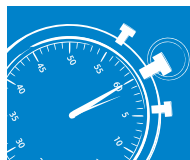
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## Activity: 10 Minutes

### DISC Case Studies

Please read the case studies in pair and:

- 1) Try to discover what are the predominant temperaments described (your side and the colleagues).
- 2) Reflect on what you can do to be more efficient working with this person.

Be ready to share with the whole group

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## DISC Case Study 1

### Situation

This person is aggressive, driving, and takes pride in his ability to get things done efficiently. Because of his need for control and his impatience, he sometimes has trouble delegating work to others. His favorite management style is 'crisis management', which he says suits him 'just fine'. However, this style tends to exhaust those around him and reduces their effectiveness. He tends to drive people rather than guide them, expecting immediate results. Given his sense of urgency, he tends to prefer simple, concrete solutions rather than spending a lot of time solving complex problems. Sometimes this approach results in making the problem worse.

You have to work with this person on a problem-solving team that will soon be reporting to upper management. Your task as a team is to develop innovative solutions for some complex problems facing your organization. Your colleague doesn't seem to want to deal with the complexity of the problem. He wants to come up with a solution right now and not waste any more time on gathering information. You are concerned that his plan is not well thought out and may, in fact, cause more problems than now exist. However, you hesitate to confront him because he tends to respond very aggressively to any challenges to his authority. While you are peers, he tends to treat you as a subordinate. This makes confronting him even more difficult and even more important for you to do before your meeting with upper management.

### Diagnosis

Him ☐

You ☐

Problem	Solution
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____



## DISC Case Study 2

### Situation

This person has attained her current position because of her precise and thorough performance. She has a reputation for doing 'things right.' She also has a need for control, especially when it comes to the quality of performance. She tends to have difficulty delegating because others may not meet her high standards. She often is heard saying "if you want something done right, you'll have to do it yourself." She tends to be very precise in her communications which sometimes results in others feeling like she 'talks down' to them. She may spend too much time organizing and setting up systems rather than actually doing the work. She tends to delay or avoid making risky decisions. Her attention to high standards of performance results in high quality work for the department. However, she can be very demanding and critical of herself and others.

You need to receive information from her to complete the reports for which you are responsible. Her concern for accuracy has caused several delays in sending you information essential for completing your assignments. This has resulted in your missing one deadline and nearly missing another. She also has been quite critical about information she has received from your area. She seems to have her own ideas about how it should be done and does not seem to consider other people's ways of doing things to be valid.

### Diagnosis

Her ☐

You ☐

Problem	Solution
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____



## DISC Case Study 3

### Situation

This person is a positive, people-oriented, out-going manager who enjoys the daily interaction with her co-workers. She is considered friends with everyone, is hard not to like and has the reputation of having the department with the highest level of moral in the organization. On the other hand, she has difficulty confronting performance problems directly, so some people in her department have been allowed to 'get by'. Other employees are beginning to complain that this 'isn't fair'. While her communications with others are excellent, she has been criticized for her failure to follow through on important task details. She tends to spend a great deal of time talking and in meetings and frequently is late on project deadlines due to her poor time management. She is known as an optimist but has trouble making hard decisions. At times she may be more concerned with maintaining her image than in getting concrete results.

One of her people has been causing problems with people in your area and you need her to take action about this situation. You and she have had several meetings about this situation, but nothing has changed. You don't want to waste time with another meeting that doesn't result in any change. Basically, you like her, but you are getting real frustrated about her unwillingness to take this situation seriously.

### Diagnosis

Her

You

Problem

Solution

1.		
2.		
3.		
4.		



## DISC Case Study 4

### Situation

This person is a friendly, easy-going and dependable individual. His reputation is one of predictable follow-through on task assignments. He is a loyal team member and works to create a harmonious work environment where everyone cooperates to get things done. Sometimes he avoids confronting other people on their failure to 'pull their share' preferring to do the work himself, rather than get involved in a conflict. It seems that some people know this and take advantage of him. He likes to create a step-by-step plan for getting things done which creates a climate of predictability. However, his desire for structure makes quick response to situations difficult for him. At times he is seen as resisting change and new methods because of his desire for structure and predictability. He may tend to procrastinate on things he finds unpleasant, such as confrontation and risky decisions.

You work with him and several other people as a member of a management team. He keeps covering up for a co-worker by completing some of his assignments. You would like to confront his non-performing co-worker, but your helpful team member is very uncomfortable with confrontation in the name of teamwork and team spirit. Also, you know it will be hard to confront your co-worker, because all the work is getting handled but not by the person who should be handling it.

### Diagnosis

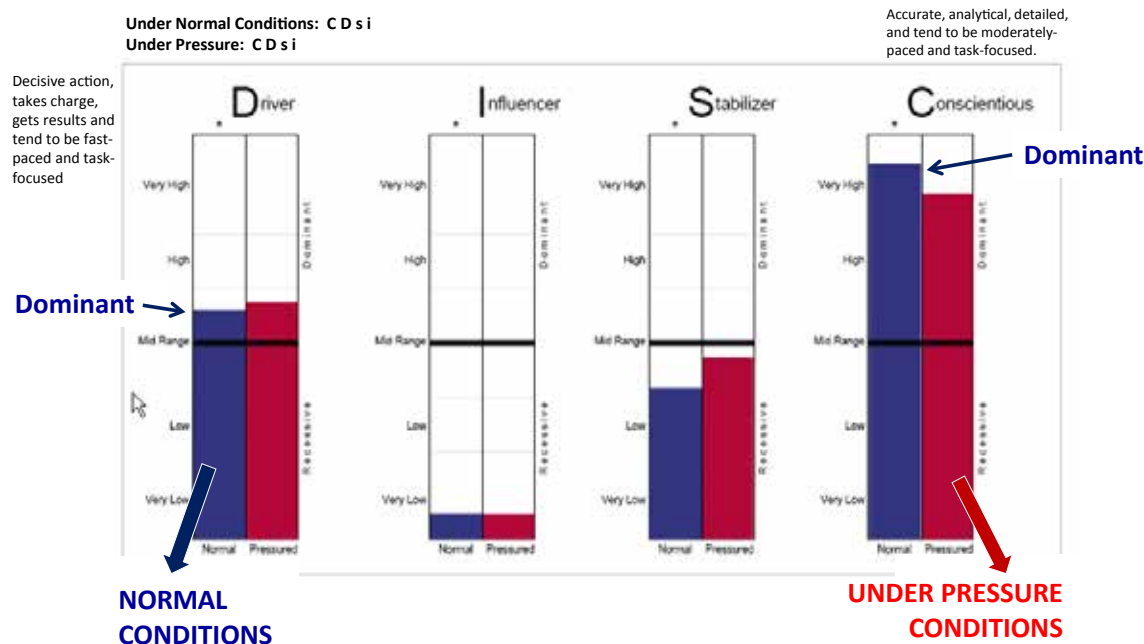
Him ☐

You ☐

Problem	Solution
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____



## How to Read your DISC Results

[illegible]

## Peer Coaching

- Objectives of peer coaching:
  - Engage in dialogue with trusted peers who can help you think through the implications of your data and where you should focus behaviour change/understanding.
- Process:
  - Select a team member to engage in peer coaching.
  - Take turns discussing your key insights from your DISC reports.
  - Identify and discuss key strengths and potential limitations in your behavior.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



## Space for reflection – DISC Response Planner

List five to seven adjectives that characterize your relationship with this colleague.

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How would you like to improve this relationship?

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Based on your working relationship, what expectations does this colleague have of you?

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Given the other colleague's DISC style, what communication needs does this colleague have?

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How is your natural communication style in conflict with those needs?

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How will you modify your behaviors and communications to increase your effectiveness with this person?

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## Additional Materials

How to use the DISC to be more effective every day.

High D's – Driver			
How You Can Spot Them		What They Want From Others	
		High D's like others to be direct, straightforward, and open to their need for results.	
How They Talk	What They Do	You Should Try To	Be Ready For
<ul style="list-style-type: none"> <li>• Ask What Questions</li> <li>• Tells vs. Asks</li> <li>• Talks More Than Listens</li> <li>• Go Right to The Issue</li> <li>• May Be Pushy, Even Rude</li> <li>• Fast Speech</li> <li>• Authoritative Tone of Control</li> <li>• Use Acronyms, Short Sentences</li> <li>• Open w/ Opinions</li> </ul>	<ul style="list-style-type: none"> <li>• Task Focus, Results Oriented</li> <li>• Impatient</li> <li>• Direct, Forceful</li> <li>• Willing to Get in Trouble</li> <li>• Time Conscious</li> <li>• Good Eye Contact</li> <li>• History of Achievement</li> <li>• Can Rely on Gut Feelings</li> <li>• Maverick</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate briefly/to the point</li> <li>• Respect their need for autonomy</li> <li>• Be clear about rules/expectations</li> <li>• Let them take the lead</li> <li>• Show your competence</li> <li>• Stick to the topic</li> </ul>	<ul style="list-style-type: none"> <li>• Blunt/demanding approach</li> <li>• Lack of empathy</li> <li>• Lack of sensitivity</li> <li>• Little social interaction</li> </ul>
How To Manage Your High D's			
You Can Help Them Learn		They May Want From You/ Your Organization	
<ul style="list-style-type: none"> <li>• Identifying with others</li> <li>• Empathy for others</li> <li>• More logic, less gut</li> <li>• Listening skills</li> <li>• To "soften" body language</li> </ul>	<ul style="list-style-type: none"> <li>• Ways to pace themselves</li> <li>• Relaxing</li> <li>• To be approachable</li> <li>• Complimenting others</li> <li>• To ask more questions</li> </ul>	<ul style="list-style-type: none"> <li>• Power and authority</li> <li>• A promotion</li> <li>• Prestige</li> <li>• Big challenges</li> <li>• Authority to make changes</li> </ul>	<ul style="list-style-type: none"> <li>• Results</li> <li>• To know the bottom line</li> <li>• Freedom from details</li> <li>• Direct answers</li> <li>• Flexibility</li> </ul>



High I's - Influencer			
How You Can Spot Them		What They Want From Others	
		High I's like others to be friendly, emotionally honest, and recognize the I's contributions.	
How They Talk	What They Do	You Should Try To	Be Ready For
<ul style="list-style-type: none"> <li>• Ask who questions</li> <li>• Tell vs. ask</li> <li>• Make small talk</li> <li>• Go off on tangents</li> <li>• Use stories or anecdotes</li> <li>• Faster speech</li> <li>• Express their feelings</li> <li>• Share personal emotions</li> <li>• Exaggerate</li> </ul>	<ul style="list-style-type: none"> <li>• Animated</li> <li>• Lots of facial expression</li> <li>• Spontaneous</li> <li>• Laugh out loud</li> <li>• Stylish dress</li> <li>• Shorter attention span</li> <li>• Warm</li> <li>• May approach you closely</li> </ul>	<ul style="list-style-type: none"> <li>• Approach them informally</li> <li>• Be relaxed and sociable</li> <li>• Let them tell you how they feel</li> <li>• Keep the conversation light</li> <li>• Provide written details</li> <li>• Give public recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Attempts to persuade/ influence</li> <li>• Need for the spotlight</li> <li>• Over-estimates self/others</li> <li>• Over-selling ideas</li> <li>• Vulnerable to feeling</li> </ul>
How To Manage Your High I's			
You Can Help Them Learn		They May Want From You/ Your Organization	
<ul style="list-style-type: none"> <li>• More control of time</li> <li>• Objectivity</li> <li>• Emphasis on clear results</li> </ul>	<ul style="list-style-type: none"> <li>• Organization</li> <li>• Sense of urgency</li> <li>• Analysis of data</li> </ul>	<ul style="list-style-type: none"> <li>• Popularity</li> <li>• Visible rewards</li> <li>• Public recognition</li> </ul>	<ul style="list-style-type: none"> <li>• Casual warm relationships</li> <li>• Freedom from details</li> <li>• Approval And friendliness</li> </ul>



## High S's – Stabilizer

How You Can Spot Them		What They Want From Others	
		High S's like others to be relaxed, agreeable, and cooperative, and to show appreciation.	
How They Talk	What They Do	You Should Try To	Be Ready For
<ul style="list-style-type: none"> <li>• Make small talk</li> <li>• Ask how questions</li> <li>• Ask vs. Tell</li> <li>• Listen more than talk</li> <li>• Slow, steady delivery</li> <li>• Reserved w/ opinions</li> <li>• Lower volume</li> <li>• Warmth in voice</li> <li>• Use first names</li> </ul>	<ul style="list-style-type: none"> <li>• Photos of relationships out</li> <li>• Consult others</li> <li>• Friendly functional work area</li> <li>• Casual relaxed walk</li> <li>• Patient, tolerant</li> <li>• Service oriented</li> <li>• Embarrassed by recognition</li> <li>• Subdued clothing</li> </ul>	<ul style="list-style-type: none"> <li>• Be logical and systematic</li> <li>• Provide a secure environment</li> <li>• Tell them about change early</li> <li>• Use sincere appreciation</li> <li>• Show how they're important</li> <li>• Let them go slow into change</li> </ul>	<ul style="list-style-type: none"> <li>• Friendly approach to others</li> <li>• Resistance to change</li> <li>• Difficulty prioritizing</li> <li>• Difficulty with deadlines</li> </ul>
How To Manage Your High S's			
You Can Help Them Learn		They May Want From You/ Your Organization	
<ul style="list-style-type: none"> <li>• Openness to change</li> <li>• Self-affirmation</li> <li>• How to make their accomplishments</li> </ul>	<ul style="list-style-type: none"> <li>• Short cut methods</li> <li>• Effective presentation skills</li> <li>• Believing their successes are worthwhile</li> </ul>	<ul style="list-style-type: none"> <li>• Status quo</li> <li>• Private appreciation</li> <li>• Happy, calm relationships</li> <li>• Standard procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Security</li> <li>• Time to adjust to changes</li> <li>• Listening</li> <li>• Sincerity</li> </ul>

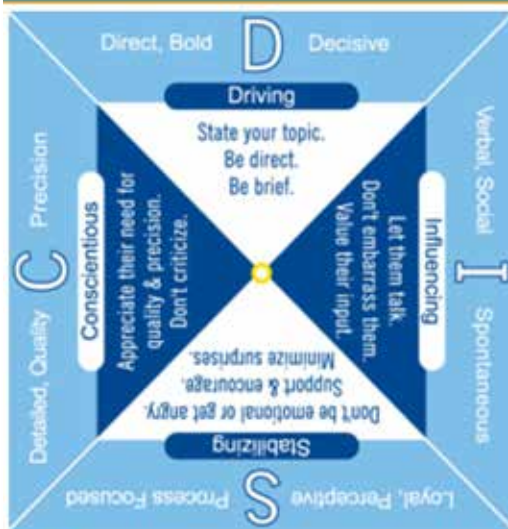




High C's – Conscientious			
How You Can Spot Them		What They Want From Others	
		High C's like others to minimize socializing, and give details; they value accuracy and attention to detail.	
How They Talk	What They Do	You Should Try To	Be Ready For
<ul style="list-style-type: none"> <li>• Ask Why questions</li> <li>• Ask vs. tell</li> <li>• Listen more than talk</li> <li>• Not a lot of reaction</li> <li>• Slower speech</li> <li>• Lower volume</li> <li>• Prefer to talk vs. writing</li> <li>• Get to point but like to talk</li> <li>• Precise, detailed speech</li> </ul>	<ul style="list-style-type: none"> <li>• Focus on task and process</li> <li>• Orderly</li> <li>• Meticulous</li> <li>• Precise, accurate</li> <li>• "Sterile" work area</li> <li>• Time conscious</li> <li>• Hard to read</li> <li>• Diplomatic</li> <li>• Want to be right</li> </ul>	<ul style="list-style-type: none"> <li>• Give clear expectations/ deadlines</li> <li>• Show dependability</li> <li>• Show loyalty</li> <li>• Be tactful and reserved</li> <li>• Honor precedents</li> <li>• Be precise and focused</li> </ul>	<ul style="list-style-type: none"> <li>• Discomfort with ambiguity</li> <li>• Resistance to vague information</li> <li>• Desire to double check</li> <li>• Little need to be w/ others people</li> </ul>
How To Manage Your High C's			
You Can Help Them Learn		They May Want From You/ Your Organization	
<ul style="list-style-type: none"> <li>• Tolerance of conflict</li> <li>• To ask for support</li> <li>• Group participation skills</li> </ul>	<ul style="list-style-type: none"> <li>• Acceptance of others' ideas</li> <li>• Tolerance of ambiguity</li> <li>• Acceptance of their limits</li> </ul>	<ul style="list-style-type: none"> <li>• Clear expectations</li> <li>• Limited exposure</li> <li>• Business-like environment</li> <li>• References &amp; verification</li> </ul>	<ul style="list-style-type: none"> <li>• No sudden changes</li> <li>• Personal autonomy</li> <li>• Chance to show expertise</li> <li>• Attention to their objectives</li> </ul>



## DISC reference tool



After identifying the person's temperament, Apply the guidelines below & enjoy the results



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Pfizer Confidential



Developing a Foundation

## Section 3

# Situational Leadership® II





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Learn a **new language** of leadership

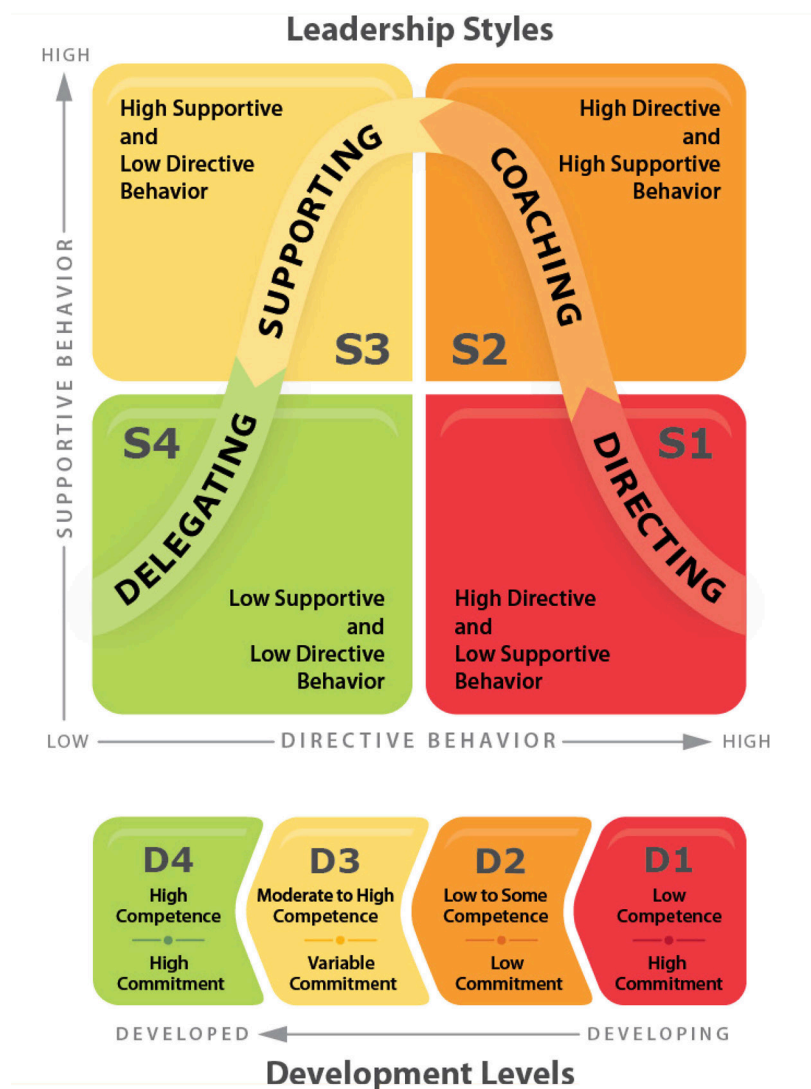
## SITUATIONAL LEADERSHIP® II

Increase the **quality** and **quantity**  
of **conversations**

Develop others' **self-reliance**

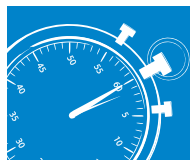


## Purposes of Situational Leadership® II Model



**There is no best leadership style**  
**The right style is a MATCH**





## Activity: 10 Minutes

Some greatest leaders...

In your opinion, what are some of the greatest leaders you have ever known? Why?

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Share your opinions within the team.

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Teams should be prepared to report back some examples to the large group.

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## Too Little. Too Much. Just Right.

List the behaviors the leader demonstrated in each of the two conversations. Then, describe the impact of those behaviors on the team member.

### Conversation 1

Behaviors

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Reactions

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### Conversation 2

Behaviors

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Reactions

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## Three Skills of a Situational Leader



**Situational Leadership® II isn't something you do **TO** people;  
it's something you do **WITH** people.**



## The First Skill of a Situational Leader: Goal Setting

### SMART Goals and Tasks are

#### **S**pecific

- What exactly is the goal or task and what does a \_\_\_\_\_ look like?
- It's an \_\_\_\_\_, related to quantity (how much), quality (how well), or comparison (is it better?).

#### **M**otivating

- Will working on the goal \_\_\_\_\_ or \_\_\_\_\_ energy?
- Does it ignite passion and fuel discretionary effort?

#### **A**ttainable

- Is the goal \_\_\_\_\_ and reasonable?
- Is accomplishing the goal within the person's control?

#### **R**elevant

- Is the goal or task \_\_\_\_\_ with organization and work team goals?
- Will accomplishing the goal positively impact \_\_\_\_\_?
- Is the goal significant? People want to do meaningful work.

#### **T**rackable

- Does the goal describe how you \_\_\_\_\_ progress?

**SMART**

**SMARTer**

**SMARTest**

### SMART Goal and Task Statements

Document the S and the T in a written goal or task statement

**S** – Achieves outcome, when

**T** – As measured or as tracked by \_\_\_\_\_

Discuss the **R**, **A**, and **M**

## SMART vs. Not-so-SMART



## Example Goals and Tasks

To reduce the number of defects by the end of the second quarter

**SMART** ☐ Yes ☐ No

To qualify for promotion to a leadership position by the end of the year

**SMART** ☐ Yes ☐ No

## Example Goals and Tasks

To increase customer satisfaction scores by 10%, from 78% to 88%, by the end of the year, as measured by the customer survey

**SMART** ☐ Yes ☐ No

To make 10 calls each week to current loan holders

**SMART** ☐ Yes ☐ No

Rewrite the Not-so-SMART goals or tasks to make them Specific and Trackable.

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## The Second Skill of A Situational Leader: Diagnosing

Diagnosing – corroboratively assessing an individual's competence and commitment on a specific goal or task



## Diagnosing Competence

Competence is an individual's

1. Demonstrated goal- or task-specific knowledge and skills
  - Understands what the goal requires (what)
  - Can describe what a good job looks like (what)
  - Has successfully done the goal or task before (what)
  - Can show examples of work (what)
  - Can describe how to achieve the goal (how)
  - Knows how long it takes to achieve the goal (how)
  - Could teach someone how to do this goal or task (how)
2. Demonstrated transferable knowledge and skills
  - Planning skills
  - Interpersonal skills
  - Problem-solving skills
  - Project-management skills

## Diagnosing Commitment

Commitment is an individual's

1. Motivation to perform the goal or task
  - Energized about the goal
  - Focused on the goal
  - Positive about the goal
  - Passionate about the goal
2. Confidence to perform the goal or task
  - Self-assured
  - Independent
  - Self-reliant
  - Willing to initiate

**Don't confuse commitment with competence!**

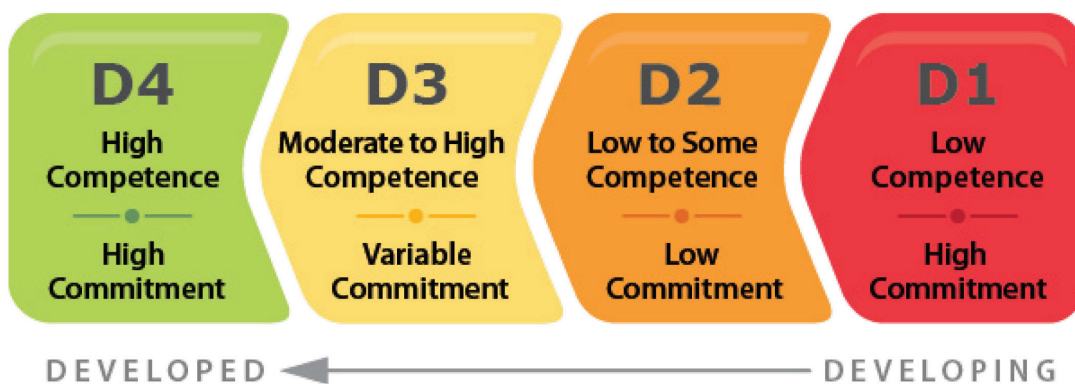




## Development Level Descriptors

Match four development level descriptors to each development level.

Not always confident	Learning
Makes productive contributions	Inexperienced
Consistently competent	Bored
Discouraged and frustrated	Self-reliant
Eager to learn	Enthusiastic
Accomplished	Generally skillful
Confused	Inconsistent performance
Self-assured	New to the goal or task



### Development Levels



**D3**

**Capable, but Cautious Contributor**

**D3 Descriptors**



**D2**

**Disillusioned Learner**

**D2 Descriptors**



**D4**

**Self-Reliant Achiever**

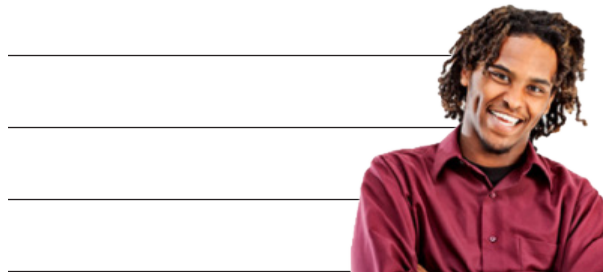
**D4 Descriptors**



**D1**

**Enthusiastic Beginner**

**D1 Descriptors**





## Development Level Descriptors

**D4**

**High Competence  
High Commitment**

### Competence

- Accomplished
- Consistently competent
- Recognized by others as an expert

### Commitment

- Self-reliant; autonomous
- Justifiably confident; self-assured
- Inspired; inspires others

**D3**

**Moderate to High Competence  
Variable Commitment**

### Competence

- Demonstrated competence; experienced
- Makes productive contributions
- Generally skillful and adept

### Commitment

- Sometimes hesitant, unsure, tentative
- Not always confident; self-critical
- May be bored or apathetic

**Self-Reliant  
Achiever**

**Capable, but Cautious,  
Contributor**

**Is successful; knows how**



## Development Level is goal or task specific!

**D2**

Low to Some Competence  
Low Commitment

### Competence

- Has some knowledge and skills; learning; not competent yet
- Doesn't know how to move forward
- Inconsistent performance and progress

### Commitment

- Discouraged and frustrated; may be ready to quit
- Overwhelmed; demotivated
- Confused and concerned; afraid of making mistakes

Disillusioned  
Learner

**D1**

Low Competence  
High Commitment

### Competence

- New to the goal or task
- Inexperienced
- Don't know what they don't know

### Commitment

- Eager to learn; curious; willing to take direction
- Enthusiastic; excited
- Confident about transferable skills and confident learning won't be difficult

Enthusiastic  
Beginner

**Is learning; doesn't know how**



## Diagnosing Mark



**Goal:** To work with his team to solve the Hong Kong cooling system problem, so that the design can be resubmitted for approval in the next month.



### Clues about Competence

_____	_____
_____	_____
_____	_____

How competent is Mark on this goal?

☐ Competent   ☐ Moderately Competent   ☐ Somewhat Competent   ☐ Not Competent

### Clues about Commitment (motivation and confidence)

_____	_____
_____	_____
_____	_____

How committed is Mark on this goal?

☐ Very Committed   ☐ Somewhat Committed   ☐ Not Committed

What is Mark's development level on this goal?

☐ D4   ☐ D3   ☐ D2   ☐ D1

What does Mark need from his leader, Jacinta

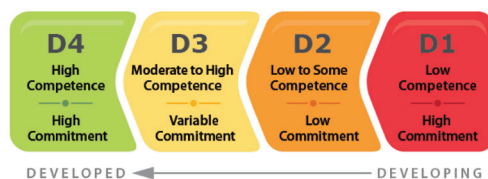


_____	_____
_____	_____
_____	_____
_____	_____



## Development Needs

### D1 – Enthusiastic Beginner

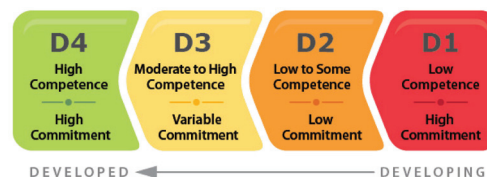


**D1**

#### Needs

- Acknowledgment for transferable skills, enthusiasm, and initiative
- Timelines and check-in points
- Limits to autonomy/authority
- A step-by-step plan for learning
- Direction about what and how
- Concrete examples/templates
- Solutions
- Access to resources and information

**Development Level is goal or task specific!!**



## D2 – Disillusioned Learner

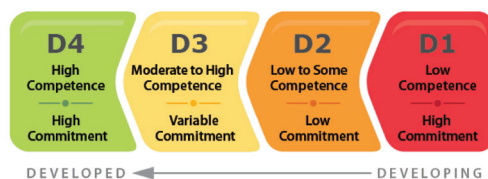
**D2**

### Needs

- Someone to listen to concerns and problems
- Perspective
- Explanations of why; rationale
- Opportunities to be involved in problem solving and decision making
- Suggestions; advice
- Directions and coaching to refine skills
- Feedback on progress
- Reassurance and encouragement



## D3 – Capable, but Cautious, Contributor



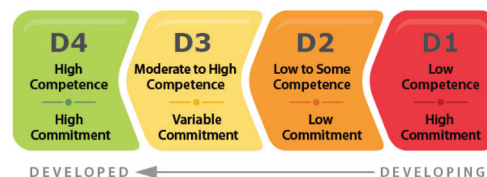
**D3**

### Needs

- Opportunities to express feelings and concerns
- Opportunities to test ideas; a sounding board
- Good questions about the work being done
- A vote of confidence and encouragement
- Help in getting something done, if needed
- Reminders of past successes
- Acknowledgment of high levels of competence and contribution
- Suggestions for making the goal more interesting or challenging (if motivation is low)

**Development Level is goal or task specific!**





### D4 – Self-Reliant Achiever

**D4**

#### Needs

- Trust
- Visibility as a contributor/an expert
- Opportunities to be creative and innovative
- Autonomy; influence
- Opportunities to grow
- Opportunities to teach and mentor others
- Resources, if requested
- To be valued for contributions



## The Third Skill of A Situational Leader: Matching

# 7

### Directive Leadership Behaviors

1. Setting SMART goals
2. Showing and telling how
3. Establishing timelines
4. Identifying priorities
5. Clarifying roles
6. Developing action plans
7. Monitoring and tracking performance

# 7

### Supportive Leadership Behaviors

1. Listening
2. Facilitating self-reliant problem solving
3. Asking for input
4. Providing rationale
5. Acknowledging and encouraging
6. Sharing information about the organization
7. Sharing information about self



**D3**

**Supporting**

### D3 Intention

**Build Confidence in competence**

#### How

1. Ask D3 for input about what and how
2. Listen and encourage
3. Facilitate problem solving by asking open ended questions

**D2**

**Coaching**

### D2 Intention

**Re-energize and reteach**

#### How

1. Explore concerns and encourage
2. Explain why
3. Redirect and reteach
4. Involve in problem solving

**D4**

**Delegating**

### D4 Intention

**Value contribution**

#### How

1. Acknowledge expertise
2. Support autonomy
3. Invite innovation and ongoing learning

**D1**

**Directing**

### D1 Intention

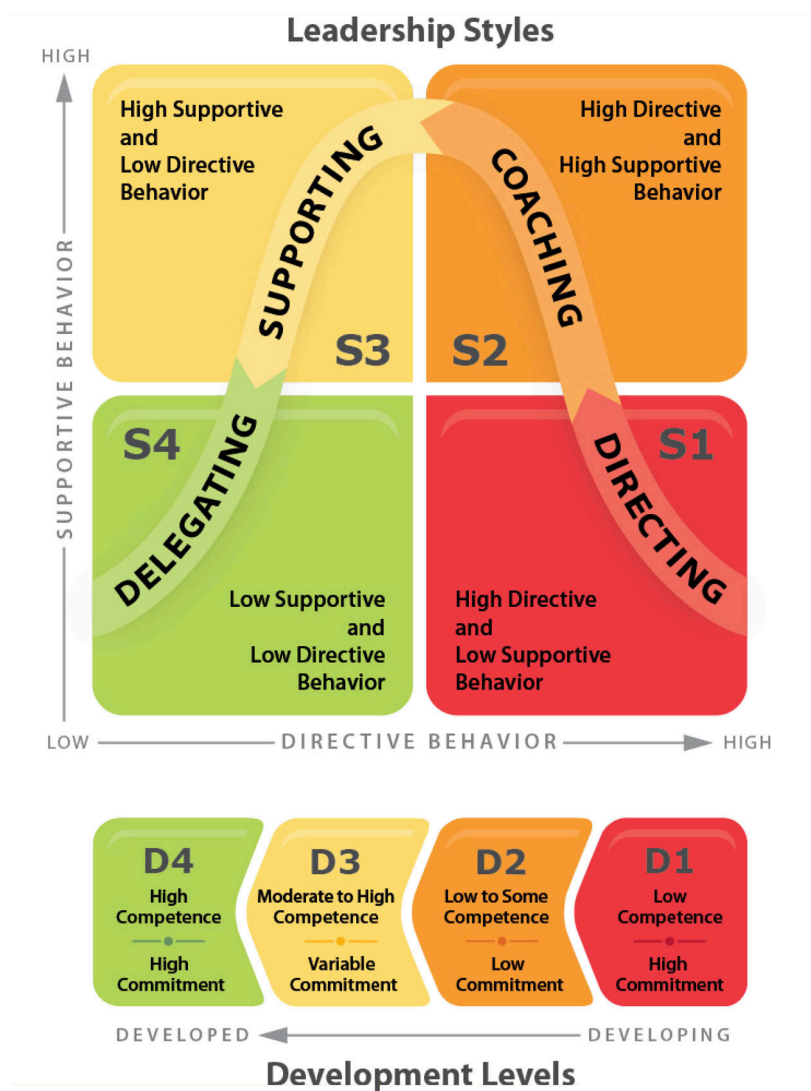
**Help others build competence**

#### How

1. Acknowledge transferable skills and/or commitment
2. Give direction about what, how and when
3. Check in frequently



## Situational Leadership® II Model



**There is no best leadership style**  
**The right style is a MATCH**



## A Conversation between Mark and Jacinta



What did Jacinta do? Check which Directive and Supportive Behaviors Jacinta used from the list below.



### Directive Behaviors

- Setting SMART goals
- Showing and telling how
- Establishing timelines
- Identifying priorities
- Clarifying roles
- Developing action plans
- Monitoring performance

### Supportive Behaviors

- Listening
- Facilitating self-reliant problem solving
- Asking for input
- Providing rationale; explaining why
- Acknowledging and encouraging
- Sharing information about the organization
- Sharing information about self

How did Mark feel at the end of the conversation?

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Why care about how Mark feels?

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## Activity: 10 Minutes

### Matching Practice

#### Scenario 1 – Alanna

Five months ago, Alanna joined a team in the company that is working on a big new budgeting project. She has a good handle on how to pull people and information together to deliver on these types of projects, and her boss has been happy with her work in the past. She is sure that is why he assigned her to this team.

Recently, though, she has been really frustrated and discouraged because she has to create a budget where costs are difficult to estimate. All of the projects she's done in the past have been much less complex. She doesn't think she is going to be able to do it. She thinks she should stick to what she's good at.

#### You should

- A. Talk with her and mention that you heard she is having difficulty creating the budget. Let her know that you are available if there is some way you can help.
- B. Tell her that you know she is working on the budget. Ask how things are coming along. Draw her out on the specifics of the budgeting process, asking open-ended questions that facilitate her thinking. Listen attentively. Do not advocate a position, but help her reach her own conclusions. Offer to help her in any way you can.
- C. Offer to help her with the budget for the new project. Drawing on your knowledge of the budgeting process, suggest some specific things she can do to get more clarity on the costs that are difficult to estimate. Share with her how you would approach the project. Draw out her reactions to your plan and build on her ideas. Engage her in exploring the rationale for the approach you've suggested. Ask her how she feels about the plan the two of you have created.
- D. Tell her that you want to help with the budgeting project. Advocate a specific course of action with clear steps and timelines. Talk about the data she needs to review. Be detail oriented, brief, and specific. Try to keep the discussion focused on your approach.

Development Level

☐

D4

☐

D3

☐

D2

☐

D1

Match (A, B, C, D) \_\_\_\_\_



## Scenario 2 – Carlos

Since the changes in the inventory system were implemented, Carlos feels his performance has dropped. His manager doesn't think so, but Carlos finds himself second guessing himself a lot, although he thinks it's a great inventory system.

Carlos is pretty quick when it comes to technology, and he thinks he gets the new system. He just doesn't feel like he totally understands it ... yet. People have started asking him how to use the system because they know he is the one who has used it the most. His manager is telling other team members that Carlos is the "expert"! Carlos just wishes he knew more.

### You should

- A. Tell him you are confident he understands the changes and how they impact the system. Tell him you are available if he needs to talk it through, but otherwise leave him alone.
- B. Give him some specific guidelines for using the new system. Explain that you have a great deal of experience with it. Set up a series of meetings to check in on his progress because he feels so unsure of himself.
- C. Listen to him and try to assure him that you understand he has a very good grasp on the changes and the new system. Ask him if there are others he could talk to for a different perspective on any of the areas where he is still feeling uncertain. Let him talk through his concerns and then ask what ideas he has to address them. Be careful not to try to solve the problem for him.
- D. Give him some specific ideas on how to deal with the new system. Listen to his reactions. Stay connected over the next several weeks to monitor his progress and offer advice and encouragement.

Development Level

☐

D4

☐

D3

☐

D2

☐

D1

Match (A, B, C, D) \_\_\_\_\_



## Scenario 3 – Miles

Miles is so excited about making a presentation to his team today. The meeting will give him a chance to get some visibility and, hopefully, some recognition for the thinking he has been doing on the social media campaign. Since this is the first presentation he has been asked to make on the work he has been doing, he's a little anxious. He's not sure how to put it together so that all the issues can be discussed. He wishes someone would just show him how they have organized their presentations in the past. He wants this to be so good.

### You Should

- A. Be available to answer his questions and to offer support, but avoid telling him how to make the presentation. Help him examine the resources he has available to help him learn how to make a great presentation. Reassure him that his personality will go a long way in making his presentation successful.
- B. Ask him to figure out what he is going to do on his own since there are good videos online that he can watch. Touch base with him later in the day to see how things are going.
- C. Teach him the things you know about making great presentations. Share a template for creating easy-to-understand presentation slides and provide him a link to a Web-based tutorial on “powerful presentations.” Meet with him after he has watched the tutorial to answer questions he has and help him craft and refine his message.
- D. Give him some specific pointers on making good presentations and share some examples with him. Tell him that you know he will do a good job. Listen to his concerns and help him work through the key points he would like to make. Ask him what his next steps should be and agree to meet with him again later in the day.

Development Level

☐

D4

☐

D3

☐

D2

☐

D1

Match (A, B, C, D) \_\_\_\_\_





### Scenario 4 – Sheila

Sheila feels really great about her job in customer service. She has gotten great feedback. She has always been recognized for her exemplary customer service even though customers are more and more demanding. She has been in this position for three years. She loves that her boss leaves her alone to do her job. She knows what she needs to do. She responds to 95 % of her customers' requests, successfully, within 24 hours.

#### You Should

- A. Get involved with one of the customer service issues that she is currently handling and provide some specific suggestions on how she can shine in resolving the challenges with this particular customer. Share your experience with similar situations. Tell her what works and doesn't work from your perspective. Schedule a follow-up meeting to check on her progress.
- B. Take the time to teach her some additional things that have worked for you. Get involved in discussions with her about current service issues. Ask her about the approach she is taking and offer suggestions where possible. Let her know you have time to help her resolve the challenges she is facing with particularly difficult customers.
- C. Ask her how things are going and share whatever information you have that may be helpful. Listen to any concerns she has about dealing with any particular service issues and help her look at alternative solutions.
- D. Thank her for all of the hard work and dedication she puts into resolving customer service issues in a timely manner and keeping customers satisfied and loyal to the company. Ask if she needs any help from you and let her know you're there for her, if she needs you.

Development Level   ☐ D4   ☐ D3   ☐ D2   ☐ D1

Match (A, B, C, D) \_\_\_\_\_



## Overnight Assignment

Considering what you have learned today about Head, Heart and Guts, DISC and Situational Leadership II, identify a situation you are struggling with, involving one of your direct reports. What insights you have in terms of:

### 1) Head, Heart and Guts leadership:

any leadership behaviors you need to apply/develop to deal effectively with the situation

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### 2) DISC temperaments:

any adjustments you may need in your temperament to deal effectively with the situation.

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### 3) Situational Leadership II:

- Diagnose the development level/needs of your direct report in the situation

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- Leadership styles adjustments you may need to make

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### 4) Any other general insights?

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### 5) Review your LBAII report and prepare questions.

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Be prepared to share your example with the group tomorrow morning.

## Peer Coaching – Ideas & Insights

- [illegible]



## Activity: 20 Minutes

# Rescripting Three Leadership Styles Conversation

## Planning Leadership Style Conversations

### Mismatch Conversation Sample

Here is an example of a mismatch conversation between a leader using an S4 leadership style and a person who is at D2 on a new project.

- |             |                                                                                                                                                 |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Team Member | I'm glad you can meet with me. I'm feeling pretty discouraged about that new project you assigned to me.                                        |
| Leader      | <b><i>There is always a time in a new project where it gets crazy. You'll get on top of it, I'm sure. There is nothing you can't do.</i></b>    |
| Team Member | But there are some aspects of the project that are really challenging that we didn't discuss. And there are some people who aren't cooperating. |
| Leader      | <b><i>Hang in there. It will get better.</i></b>                                                                                                |

### Rescripted Conversation Sample

Here is a rescripted conversation using Leadership Style 2 Conversation Starters. Use this example to help you rescript the conversation you are assigned. You only need to write the Leader's dialogue.

- |        |                                                                                                                                                                                                                                    |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Leader | <b><i>I hear you wanted to talk about the new project. It sounds like it's not going the way you expected. Tell me what's happening.</i></b> (Leader listens.)                                                                     |
| Leader | <b><i>What else is on your mind?</i></b> (Leader listens.)                                                                                                                                                                         |
| Leader | <b><i>So let me reclarify the goal. Since you're still trying to figure this project out, would it be helpful for me to provide you with some advice; make some suggestions? But I really want to hear your ideas as well.</i></b> |
| Leader | <b><i>You've made more progress than you think.</i></b> (List accomplishments.)                                                                                                                                                    |
| Leader | <b><i>And there's some additional advice or direction I can provide.</i></b> (Share thoughts.)                                                                                                                                     |



- Leader      *What do you think? How would you expand on what I've suggested?* (This exchange – advice and the team member's reactions and comments – could go back and forth many times.)
- Leader      *The feedback I've heard from others is ... It should be encouraging.*
- Leader      *What else do you need help with?*
- Leader      *So can you recap what I've shared with you so I can make sure we are aligned?*



## Leadership Style Conversation 1

### Team Member's Goal

To complete an action plan for delegating key tasks to targeted team members within the next week so that expectations are clear and team members are excited about learning how to do the tasks they've been assigned

<b>Leader</b>	<b><i>Hey, good to see you. How's it going with our newest team member?</i></b>
Team Member	Hi. I'm excited about my promotion. Of course, the whole performance management thing is a bit different than I anticipated. That's why I'm here. I really want to do a good job and could use some help with getting my team members on board and excited about all of the work we've got to do.
<b>Leader</b>	<b><i>I know there's a lot for you to do. A promotion can be a big transition. No matter how you prepare for it, there's a bit of reality shock moving into a leadership role. I remember when I got my first major promotion. It took me months to figure out what I was supposed to be doing, no less what my team members were supposed to be doing.</i></b>
Team Member	I know. For example, I'm trying to train Lee to take on scheduling, but I still end up doing most of the work myself. It's much easier.
<b>Leader</b>	<b><i>Isn't that the truth? I remember when I first got promoted. People I'd worked side by side with for years suddenly started treating me differently. Why don't you put together a plan that outlines which tasks you think you'd like to delegate to people on your team, like Lee?</i></b>
Team Member	To be honest, I'm not sure where to start. I don't have any experience setting goals and developing action plans for other people. I need your help.
<b>Leader</b>	<b><i>One of the things I know about you is that you're smart. I'm sure that if you just sit down and think about it, you'll be able to figure it out. Why don't we get together in a couple of days and you can share your action plan with me.</i></b>
Team Member	OK. You're putting a lot of faith in me. I'll see what I can come up with on my own.

Team Member's Development Level **D1**

Scripted Leadership Style **S3**

**S1**

This image shows a single page from a notebook or ledger. The page is white and features horizontal ruling lines spaced evenly down its length. In the upper right-hand corner, there is a small red rectangular tab with the number "31" printed on it in white. The rest of the page is empty, with no handwriting or other markings.



## Leadership Style Conversation 2

### Team Member's Goal

To increase call numbers on a daily basis in the department so that the team consistently meets the standards that have been set

Team Member	Hi. Do you have a few minutes to talk to me? I'm struggling with how to increase outbound calls and could really use your help.
Leader	<i>Sure. I've noticed that some of your call numbers are way down. I'm hearing that you're spending most of your time in your office rather than coaching your people.</i>
Team Member	Look. I'm trying to get things under control, but I'm really not sure exactly what to do.
Leader	<i>Well, here's what I want you to do about it. You need to go to your team members and let them know we have a problem with the number of calls they are making. Take the call report with you and show them what the problem is. And, I want to meet with you weekly to track your team's progress on making outbound calls.</i>
Team Member	I know calls are down and believe me, I'm trying. I'm just having some difficulty. I need a little time to work things out.
Leader	<i>You need to start having some tough conversations with your team members. Give them clear direction, just like I'm giving you now. You have to stay on top of the members who aren't making enough calls.</i>
Team Member	I've been doing a lot of thinking about why the numbers are down.
Leader	<i>You need to spend more time talking to your team so you can be sure that they will understand how important it is to get their numbers up. In the meantime, you and I can get together every day or so to see if we can't stay on top of this problem. Together, we can turn this situation around – I guarantee it, because things can't stay the way they are, can they?</i>
Team Member	I'm still not sure that just walking around and telling people to take more calls will fix the problem, but okay, I'll do it your way.

Team Member's Development Level **D2**

Scripted Leadership Style **S1**



## Leadership Style 2 Conversation Starters

Use these Style 2 Leadership Behaviors to rescript the conversation so that it's a match (S2) for the team member's development level (D2). Focus only on what the leader would say. Don't write the team member's dialogue.

**S2**

<b>Leadership Behaviors</b>
<b>CONNECT</b>
Clarify purpose of meeting
Listen to concerns
<b>ALIGN</b>
Reclarify SMART goals
Get Style 2 agreement (development level and leadership style)
<i>"Since you're still learning, and may be discouraged, would it be helpful if I continue to provide you with some direction? And I'd also like to hear your ideas."</i>
Provide perspective
Explore "why" about "what and how"
<b>COACH</b>
Involve the individual in problem solving
Redirect and reteach
Provide feedback and coaching
Provide encouragement and support
<b>RECONNECT</b>
Check for understanding and alignment

[illegible]



## Leadership Style Conversation 3

### Team Member's Goal

To build trustful relationships with the new team members as quickly as possible so that the team can begin to build its charter and launch the new project

<b>Leader</b>	<b><i>Hi. I want to talk to you about the new project I asked you to take over from Sandy. Since I haven't heard how you are going to approach it, I put an action plan together.</i></b>
Team Member	It's not the action plan I'm concerned with. I'm worried about how they're reacting to this change in leadership.
<b>Leader</b>	<b><i>You're one of our most seasoned project managers. I think you're more than qualified and competent to handle this important project and the relationships involved. That's why I reassigned it to you.</i></b>
Team Member	But Sandy worked with them a long time. She built a lot of trust. They respected her. I'm afraid they might not appreciate my style. I tend to be a little more hands on than she was, which I think is warranted given the stretch goals we've set.
<b>Leader</b>	<b><i>I'll tell you what we'll do. First, I'll send them a letter explaining the project and why I chose you to lead it. Then, I'll set up a meeting where I'll outline my expectations for them. I'll introduce you and you can explain why you're so excited to be managing the project.</i></b>
Team Member	Umm ... I think these steps might erode my credibility. This isn't how I've launched new projects in the past.
<b>Leader</b>	<b><i>Well, since you're so unsure of yourself in this situation, I'll take the lead. Of course, I'll explain that in the future they'll be dealing strictly with you.</i></b>
Team Member	I think I'd feel more comfortable dropping them a note and then setting up a series of "getting to know you" meetings with individual team members. After that, we can actually develop a team charter to clarify our purpose and roles.
<b>Leader</b>	<b><i>No, let's do it the way I've outlined and see how it goes. I want to move quickly on this.</i></b>
Team Member	Whatever you say.

Team Member's Development Level **D3**

Scripted Leadership Style **S2 / S1**

## Leadership Style 3 Conversation Starters

Use these Style 3 Leadership Behaviors to rescript the conversation so that it's a match (S3) for the team member's development level (D3). Focus only on what the leader would say. Don't write the team member's dialogue.

**S3**

<b>Leadership Behaviors</b>
<b>CONNECT</b>
Clarify purpose of meeting
Listen
<b>ALIGN</b>
Confirm SMART goals
Get Style 3 agreement (development level and leadership style)
<i>“Since you know how to do this, what you need me to do is listen, rather than give advice, right?”</i>
Facilitate self-reliant problem solving by asking questions; let D3 determine how
<b>SUPPORT</b>
Express confidence and encourage
Provide help and ideas, if asked; remove obstacles to goal accomplishment
Reflect on past successes
Acknowledge competence and contributions
<b>RECONNECT</b>
Check for understanding and alignment

[illegible]

## Leadership Style 4 Conversation Starters

Use these Style 4 Leadership Behaviors to script a conversation so that it's a match (S4) for a team member's development level (D4). Focus only on what the leader would say. Don't write the team member's dialogue.

S4

Leadership Behaviors
<b>CONNECT</b>
Clarify purpose of meeting
<b>ALIGN</b>
Review SMART goals
Get Style 4 agreement (development level and leadership style)
<i>"I know you're taking the lead, but I'm here, when and if you need me."</i>
Draw out and create visibility for success
<b>INSPIRE</b>
Encourage creativity and innovation
Support autonomy
Support growth
Provide opportunities to teach or mentor others
Acknowledge competence, commitment, and contribution
<b>RECONNECT</b>
Take action on D4's ideas

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. In the top right corner, there is a small green tab with the number "34" written on it in black. The rest of the page is empty.



## Activity: 20 Minutes

### Match-Mismatch Activity-

There will be a series of **four** role-plays:

- Each person will be assigned a specific role
  - Either a D-level Direct Report or an S-level Supervisor
- You will play the same assigned role in each of the four role-plays
- Keys to success:
  - Stay in your **assigned** role
  - **Do not** share your D or S level
  - **Do not** deviate from the script
  - Read **only** your parts of the script
- You will also receive a Match-Mismatch Tip Card with tips on how to play your role:
  - Ss will play the role of Supervisor
  - Ds will play the role of the Direct Report
  - Ds will stand across from the Ss
- After each interaction, take notes/insights on the observation sheet.



## Match-Mismatch Activity - Scripts

### Match-Mismatch – Style 1

**Scenario:**

A conversation between a Supervisor and a Lead Operator who reports to you.

**Supervisor's Goal:**

Create a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

**Other Considerations:**

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

**Style 1:**

- As the person ultimately responsible for making sure that the training is implemented, you are meeting with this Lead for the first time since making this requirement known.
- You have a checklist in hand for implementing the training. Each Lead Operator is supposed to complete the checklist and give it to you. You are supposed to turn the checklists in to your boss 4 weeks from now.
- You want to make sure that each direct report understands and can explain the following:
  - The key components to creating a learning verification for each procedure.
  - Details surrounding their unique part of the drug finishing process.
- You don't expect this Lead to have everything done, and you are eager to roll up your sleeves and help as much as possible.
- You have some concerns about the Lead you are meeting with. When you went over the plan in your last team meeting, this Lead did not ask any questions. You are fairly certain he or she hasn't even started the training. You believe that this Lead, if left alone, would start the training late, thinking it was going to be easy to get it done. You know it is not going to be easy!
- You know exactly what needs to be done to set up and roll out the training. You used to be a Lead in this department. If the Lead has not started, you will know exactly how to do it.
- You assume the Lead needs your help and you intend to go over every step of the program in order to achieve this objective.



### Style 1 (Con't)

- You want the initial presentation for the training plan scheduled this week, and you want each direct report to have completed the training within the 4 weeks.
- You expect that the Lead is a little nervous about having to make a presentation, and you have some tips to share about how to be more confident and get through the material in 2 hours.
- The training program will be a lot of extra work, and you want to make sure that the priorities are clear.
- Be sure you frequently check for understanding as you conduct this meeting.
- Make sure you take the lead in the conversation. Although there is some give and take in Style 1, you need to be sure you cover the specifics of what, how, and when this work is going to get done within the next 4 weeks.



## Match-Mismatch – Style 2

### Scenario:

A conversation between a Supervisor and a Lead Operator who reports to you.

### Supervisor's Goal:

Create a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

### Other Considerations:

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

### Style 2:

- As the person ultimately responsible for making sure that the training is implemented, you are meeting with this Lead for the first time since making this requirement known.
- You have a checklist in hand for implementing the training. Each Lead Operator is supposed to complete the checklist and give it to you. You are supposed to turn the checklists in to your boss 4 weeks from now.
- You want to make sure that each direct report understands and can explain the following:
  - The key components to creating a learning verification for each procedure.
  - Details surrounding their unique part of the drug finishing process.
- You don't expect this Lead to have everything done, and you are meeting with this Lead today to offer your help.
- First, you want to get an update from the Lead. You want to find out how the training is coming and if all the training sessions have been scheduled.
- Be sure to praise progress. Acknowledge whatever has been done.
- Expect the Lead to be overwhelmed by the training program and the amount of material that has to be covered.
- Assume that the Lead doesn't believe in that the training program adds value to getting product out the door.
- Do some thinking about these two concerns and have some advice ready for the manager in both areas.





### Style 2 (Con't)

- You know this Lead is concerned that productivity and morale will go down as the training plan is implemented, at least initially. The Lead has repeated this concern to you on the phone over and over and over again.
- Ask the Lead to share his or her questions with you about the program. You know that the Active Learner Gap Reports are confusing. Urge the Lead to tell you how he or she is going to create the learning verifications. Be sure that the Lead feels comfortable.
- Praise and redirect as appropriate. Share good ideas but hear the Lead's good ideas too.
- Spend a fair amount of time explaining why you think the training program is going to work and why the plant is going in the right direction.
- Be empathetic to the extra hours that will be required to implement the training program, but be positive about the increase in productivity and teamwork you expect from this training in the long run.
- Offer to model or demonstrate part of the training if the Lead would like your help to kick off the initiative.
- Be sure the conversation has a lot of give and take.
- Make the final decisions about any problems or action plans.
- Share how you are going to be following up with the Lead over the next 4 weeks.



## Match-Mismatch - Style 3

### Scenario:

A conversation between a Supervisor and a Lead Operator who reports to you.

### Supervisor's Goal:

Create a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

### Other Considerations:

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

### Style 3:

- As the person ultimately responsible for making sure that the training is implemented, you are meeting with this Lead for the first time since making this requirement known.
- You have a checklist in hand for implementing the training. Each Lead Operator is supposed to complete the checklist and give it to you. You are supposed to turn the checklists in to your boss 4 weeks from now.
- You want to make sure that each direct report understands and can explain the following:
  - The key components to creating a skill verification for each procedure.
  - Details surrounding their unique part of the drug finishing process.
- Expect this Lead to raise questions and concerns freely. Don't volunteer a lot of advice or specifics on what to do.
- Offer opinions and agree to provide additional resources if requested by the Lead; however, don't impose any of your ideas on him or her.
- Listen a lot; draw out problems. Ask frequently, "How can I help?"
- If this Lead is further ahead in planning the training than your other department Leads, then praise.
- Share the positive comments you have heard from this Lead's shift. Even though they haven't had the training, the Lead has apparently been effective in communicating the benefits of the program, and everyone is looking forward to it.
- Remind the Lead about the follow-up report you need to complete for your boss in 4 weeks, but emphasize that you don't think it will be a big deal on this shift because things are going so well.



### Style 3 (Con't)

- If the Lead seems noncommittal about the training, remind him or her about the results that other departments that have already implemented the training have gotten. Focus on the increased productivity, morale, and teamwork.
- If the Lead seems frustrated, help him or her consider alternative solutions to the problems and challenges he or she is facing.
- Listen more than talk. Assume the best. Ask open-ended questions.
- Acknowledge and reflect feelings.
- Remember that a D3 has the skills but may be low in motivation or confidence. Interpret every comment as a commitment problem, not a skills problem.



## Match-Mismatch - Style 4

### Scenario:

A conversation between a Supervisor and a Lead Operator who reports to you.

### Supervisor's Goal:

Create a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

### Other Considerations:

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

### Style 4:

- As the person ultimately responsible for making sure that the training is implemented, you are meeting with this Lead for the first time since making this requirement known.
- You have a checklist in hand for implementing the training. Each Lead Operator is supposed to complete the checklist and give it to you. You are supposed to turn the checklists in to your boss 4 weeks from now.
- You want to make sure that each direct report understands and can explain the following:
  - The key components to creating a skill verification for each procedure.
  - Details surrounding their unique part of the drug finishing process.
- As you go into this meeting, assume that everything has been taken care of. The Lead has a plan and all the skills, motivation, and confidence to carry it out.
- Assume that the results will be good.
- Don't offer advice, solutions, recommendations or ideas.
- Don't offer a lot of praise or reinforcement.
- Expect the Lead to do most of the talking.
- Tell the Lead that you know he or she can handle it.
- Suggest going out for a cup of coffee because "it's all handled" from your perspective.
- Don't make a big deal of the follow-up report you have to complete for your boss 4 weeks from now. You know this department will enthusiastically implement training.
- Consider asking the Lead to help you with the less-experienced Leads.



## Match-Mismatch - Development Level 1

### Scenario:

A conversation between a Lead Operator and Supervisor you report to.

### Lead's Goal:

To implement a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

### Other Considerations:

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

### Development Level 1:

- You are excited about the potential of the new training program but unsure about how to implement it.
- You don't completely understand the priority of this initiative compared to the other initiatives that are going on right now such as end of the year production goals.
- You are open to all ideas and advice your boss has about how to schedule and roll out the training.
- You have never implemented a training program before where you had to incorporate learning verifications for each procedure.
- You are challenged by the assignment and think the training will produce some good results.
- You are willing to put in the extra hours this project is going to take.
- You have some questions, but you are fairly confident you can handle the assignment.
- You have a tendency to underestimate the time and work it takes to get a project like this done.
- You have been waiting for this meeting with your boss before getting started. You probably could have begun after the Department Meeting when this program was first introduced, but you thought it would be safer to wait until you and your boss had a chance to meet.



## Match-Mismatch - Development Level 2

**Scenario:**

A conversation between a Lead Operator and Supervisor you report to.

**Lead's Goal:**

To implement a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

**Other Considerations:**

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

**Development Level 2:**

- You have been struggling to manage all the priorities on your plate right now. You are overwhelmed, so you haven't scheduled the training yet. You haven't thought much about it since the Department Meeting.
- You know this training program is going to take a lot of work.
- You are discouraged because you anticipate that productivity and morale will go down initially while your direct reports are learning new skills.
- You have some ideas about how the training ought to be done, but you aren't sure if there is room for your ideas in this program. The Training Department has strict guidelines on how to get this done.
- Your supervisor has been really busy lately, so you feel unsupported.
- You know that the training program won't be enough to get your colleagues to use the new skills. You are concerned about follow-up.
- You recently tried to use the approach and some of the new skills your colleagues are going to learn in this training program, and they really don't work.
- You don't have confidence in your facilitation skills, although people tell you that you are good at training colleagues.
- You have good planning skills and good relationships with your colleagues.



## Match-Mismatch - Development Level 3

### Scenario:

A conversation between a Lead Operator and Supervisor you report to.

### Lead's Goal:

To implement a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

### Other Considerations:

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

### Development Level 3:

- You believe in the program, and the results in other departments have been positive. You believe productivity, morale, and teamwork in your department will increase after the training if you can get colleagues to use the skills.
- You are a little apprehensive about how successful the program will be, given all the other initiatives going on.
- You have some ideas about how to make the training interesting. You have been working with Learning and Development in creating ideas.
- You are unsure if you will have your supervisor's support if problems come up.
- When something is easy for you, you tend to procrastinate, which gets you in trouble.
- You are already a little discouraged because you believe the time frame for implementing the training may be unrealistic. You think staff is expecting too much too soon.
- None of these concerns will probably get in the way of implementing the program in the long run, but you are looking forward to the meeting today with your supervisor so that you can get some of these concerns out on the table.
- Your facilitation skills are good, and you are comfortable being in front of a group.



## Match-Mismatch - Development Level 4

**Scenario:**

A conversation between a Lead Operator and Supervisor you report to.

**Lead's Goal:**

To implement a training gap closure plan for all department direct reports and ensure that they are using the skills on the job 8 weeks from now for new product launch

**Other Considerations:**

- The training needs to be accomplished within 4 weeks
- FDA will be returning verify colleague qualifications before launching new product

**Development Level 4:**

- You have already begun to implement the new training program.
- You have a lot of training experience.
- You have good planning skills and have gotten this project off to a good start. All the training sessions are scheduled and learning verifications are in the process of being created for new product procedures.
- You are generally motivated and confident.
- You believe the program will increase productivity, morale, and teamwork.
- You are willing to help less-experienced Leads with the implementation of their programs.
- Your department colleagues are great! They will learn the new skills being taught in training quickly.
- You may need some additional resources from your supervisor, but nothing out of the ordinary.





## Match-Mismatch

### Participant Observation Sheet

Please take notes/insights of your interactions, considering those that matched/mismatched:

First Reaction

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Second Reaction

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Third Reaction

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Fourth Reaction

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# Ideas, Insights and Intentions

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



## Next Steps

To become a Situational Leader, I will:

- 1)  

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- 2)  

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- 3)  

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- 4)  

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## Section 4

# Inside Out Coaching



GROW Model



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*We exist to free people up to  
do their best stuff and  
achieve everyday greatness*

InsideOut Development is an award-winning training and development company that helps drive results at the individual, team, and organizational levels. For over two decades, InsideOut Development has helped free up tens of thousands of people using best-in-class training programs, coaching services, and business performance solutions that help our clients turn existing potential into high performance.



“As a leader, your number one priority is to help others perform at their best and to get them to believe in what’s possible.”

—Alan Fine

As leaders, you are in constant dialogue because it permits work to get done, and you get work done through people. Coaching is the directional dialogue that impacts the actions of others and is a versatile and powerful way to improve performance. Whether it’s a personal breakthrough or a team goal, coaching enhances the productivity of virtually every relationship.

InsideOut Coaching will equip you to use coaching more frequently and effectively by providing you with a simple and flexible framework and toolset to lead engaging and powerful dialogue that drives decisions that lead to actions that produce results.





## Getting Started

### THINK ABOUT:

What's most important for you or your team to accomplish right now?

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Where are you stuck, or where do you need to make progress?

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Who do you need to gain alignment or agreement with to make progress?

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Notes: \_\_\_\_\_



## MODULE 1

# COACHING DRIVES RESULTS

An InsideOut Mindset™ and coaching approach brings out existing potential and elevates every performance.







## COACHING

The practice of helping others make decisions, commit to actions, and produce results.

The Europeans coined the term “coach” for a vehicle that takes valued people from where they are to where they want to go.





## Activity: 10 minutes

### Your Coaching Knowledge

What do you know about coaching?

Note any insights from the activity:

My best coach helped me to...

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If I were to improve my coaching, I would...

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If I coached more/more effectively, my people would...

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Coaching is critical to achieve our key business results of...

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## Activity: 5 minutes

### Capacity Survey

What percentage of capacity do individuals you work with use right now?

Note any insights from the activity:

100 %	
90 %	
80 %	
70 %	
60 %	
50 %	
40 %	
30 %	
20 %	
10 %	



## Outside-In and InsideOut Coaching

Outside-In and InsideOut, or a blend of the two, are ways you can approach coaching. The “tell” approach, or Outside-In, is the most common way we coach to improve performance. However, giving the individual more information doesn’t always produce the results you want. To be a more effective coach, start conversations by asking questions. The “ask” approach, or InsideOut, helps you determine where the other person is, and if he/she already has the knowledge or the capacity to learn what is needed to produce the desired result.



Outside-In | The “tell” or “advice-giving” approach

Give advice or transfer more knowledge to the individual.

**What can I put in?**



InsideOut | The “ask” approach

Remove barriers so the individual can learn faster and act on existing knowledge

**What can I bring out?**



### PERFORMANCE EQUATIONS

OUTSIDE-IN COACHING

INSIDEOUT COACHING

$$P = C + K$$

Performance =  
Capacity + Knowledge

$$P = C - I$$

Performance =  
Capacity - Interference





## The InsideOut Mindset™

The belief that everyone has capacity to learn and perform at a higher level.





## Coaching Opportunities Are Everywhere

You have coaching conversations every day, in and outside of work. These are conversations with your manager, employees, friends, neighbors, spouse, and children. You engage in coaching conversations for various reasons: to problem solve, motivate, course correct, make decisions, or elicit greater ownership.

Some coaching conversations are quick and in-the-moment, while others may be challenging and require more time and planning. When you're able to identify the type of conversation and the end goal, you can determine the best approach and use the right tools to help navigate and ensure the conversation is successful.



### COACHING OPPORTUNITIES

If you're in a situation where you need to influence an action or a result, you have an opportunity to coach.



## Activity: 10 minutes

## Your Coaching Conversations

What types of coaching conversations show up most often (Outside-In or InsideOut)?

Note any insights from the activity:

[illegible]



## Conversation Compass



There are three main types of coaching conversations:

- Support others in achieving a breakthrough toward their goal
- Assess progress and provide feedback
- Gain alignment and agreement for your goal

The conversations complement each other. InsideOut Coaching will equip you with the mindset and tools to successfully navigate all three types of conversations.



Notes: \_\_\_\_\_



## MODULE 2

# NATURE OF PERFORMANCE

Knowledge, Faith, Fire, and Focus are key elements that impact performance.





## Video: Nature of Performance



**AS YOU WATCH THE VIDEO, CONSIDER:**

What stands out to you?

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### THE POWER OF FOCUS

Focus drives the wheel and is your highest leverage. When you influence Focus, you naturally impact Faith and Fire.





## The Performance Wheel™



### Knowledge: Experiences

Facts, information, and skills acquired through experience or education form the fundamental competence with which we approach our roles.

### Focus: Attention

What we pay attention to and how we pay attention affects everything else, and when we change focus, we change performance. When individuals can't maintain focus, performance is inconsistent.

### Faith: Beliefs

Greater focus raises confidence and belief—or faith—in our own abilities. When individuals doubt themselves, that insecurity decreases focus and lowers performance.

### Fire: Energy

With more faith, our fire—passion, engagement, and commitment—increases. When fire is lower, so is commitment and motivation, resulting in indifference and compliance.





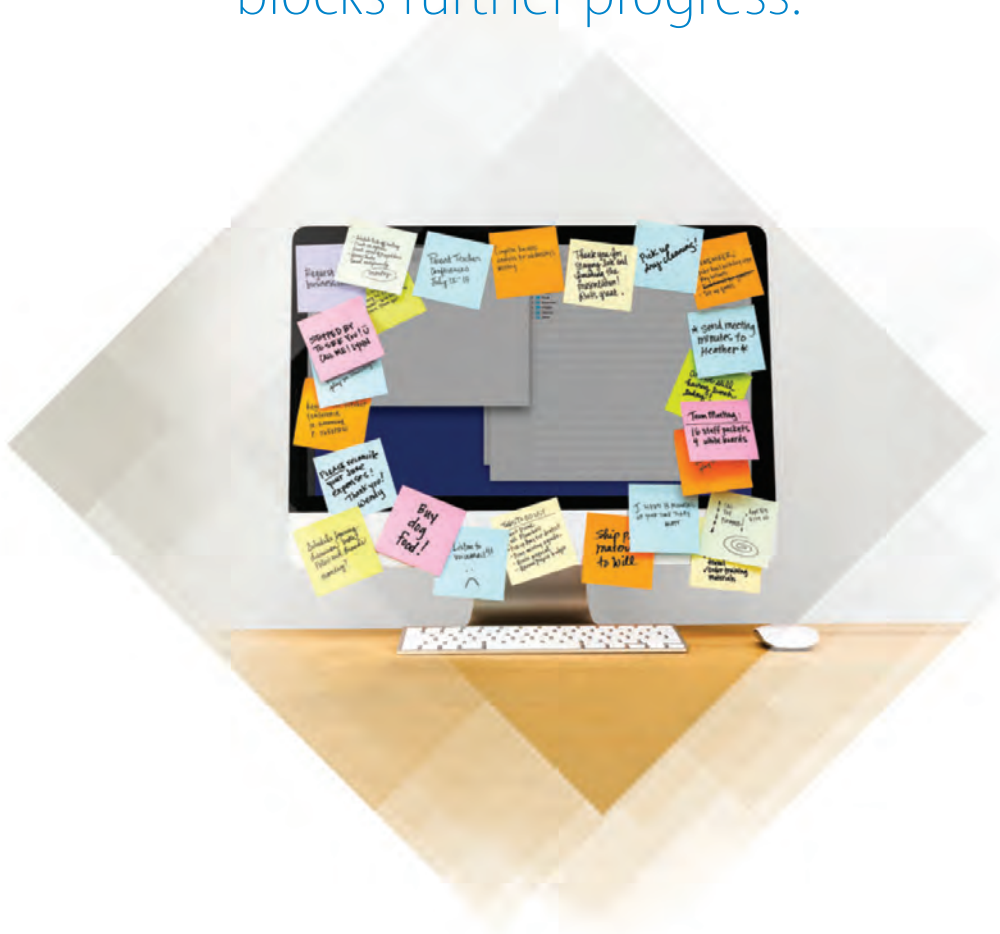
## Fundamentals of High Performance

- We all have phenomenal capacity to learn and perform at a higher level.
- The biggest obstacle to improving performance isn't knowing what to do, it's doing what we know.
- Interference blocks our capacity to act on what we already know.
- Increasing focus reduces interference.



# Interference

Interference is anything that blocks further progress.





## Sources of Interference

### External Interference:

Something in the environment that is in the way and is often out of your control:

- Unclear goals
- Deadline changes
- Broken equipment
- Interruptions from colleagues
- Information overload
- Competing priorities

### Internal Interference:

Unproductive internal dialogue, mental clutter, or behavior, often in reaction to the external interference:

- Frustration
- Fear and anxiety
- Distrusting others or playing the blame game
- Insecurity or self doubt
- Feeling overwhelmed



## Change Focus, Change Performance

### Focus powers performance



What is the result? How do you feel?

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What is the impact to your performance wheel?

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Notes: \_\_\_\_\_



## MODULE 3

# COACHING FOR BREAK THROUGH

The GROW® Model is a tool that maps how we make decisions and helps individuals break through barriers to achieve a goal.

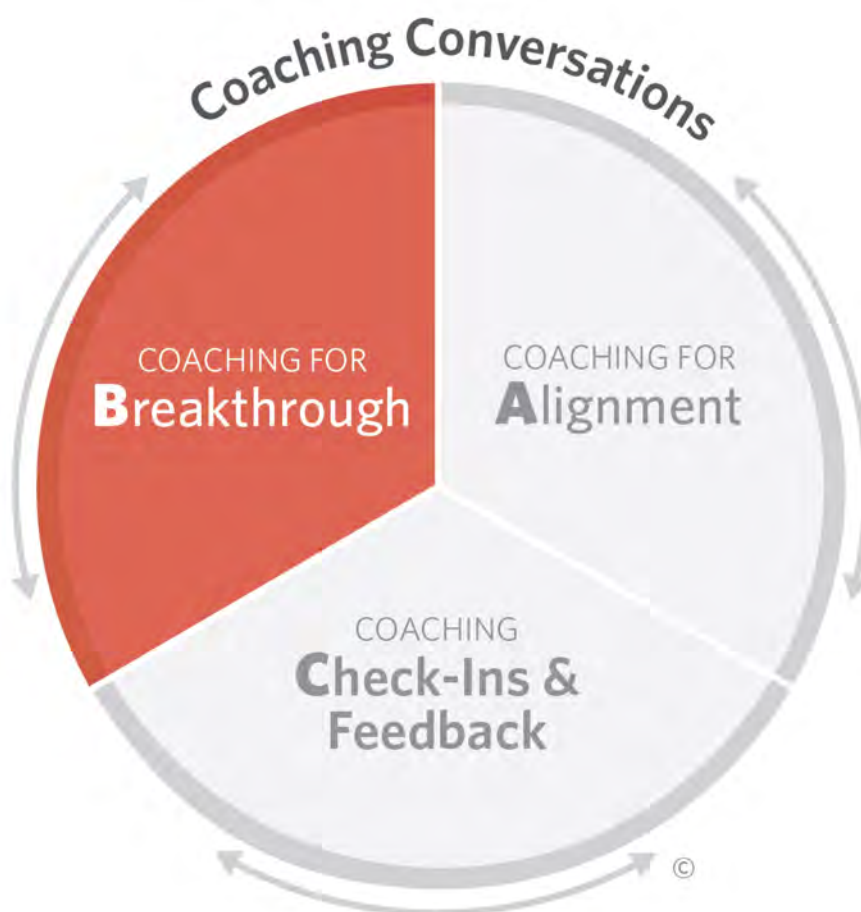






## Coaching For Breakthrough

Support others to achieve a breakthrough toward their goal.





## BREAKTHROUGH

A breakthrough is a shift that permits further progress.

### WHEN TO COACH FOR BREAKTHROUGH:

Any time someone asks for your help, shares a challenge, or asks for your perspective, you have an opportunity to Coach for Breakthrough.

Whether subtle or dramatic, breakthroughs are about getting unstuck, clarifying goals, making decisions, and determining the best way to move forward.







## The GROW® Model

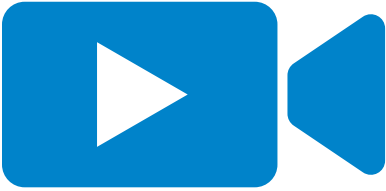


### GROW: Goal, Reality, Options, Way Forward

The GROW Model is a widely used tool that maps decision making and enables breakthroughs. When you're able to make better decisions more often, you accelerate individual and organizational performance.



## Video: Introduction to GROW®



**AS YOU WATCH THE VIDEO, CONSIDER:**

What stands out to you?

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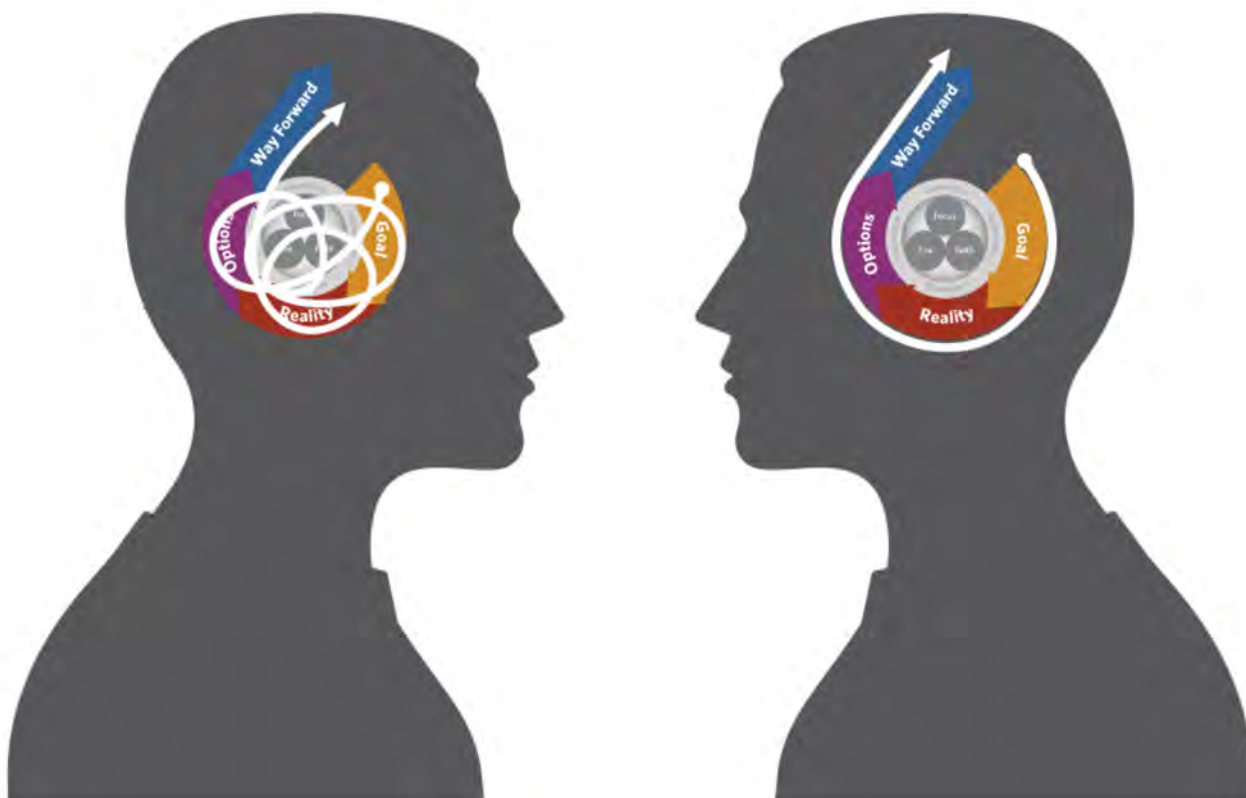
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## Decision Velocity®



Decisions ► Actions ► Results

**GROW® increases Decision Velocity – the speed and accuracy of decisions.**



## How to Use GROW®

### Goal

GROW starts with the GOAL. In setting the goal, you target the individual's objective—what he/ she wants to accomplish.

- Clarify the GOAL of the conversation.
- Ensure its importance.



GROW Model

### Reality

The second step in GROW is exploring REALITY. Following the questions in this section will help the individual do the following:

- Get a sense of the current state of performance.
- Evaluate previous attempts to address the problem.



GROW Model



## Options

The third step in GROW is brainstorming OPTIONS. This allows the coach and the individual to generate ideas for meeting the goal.

- Explore every idea without judgment.
- Help the individual narrow the list to those actions that he/she believes will meet the goal.



GROW Model

## Way Forward

The fourth step in GROW is identifying the WAY FORWARD.

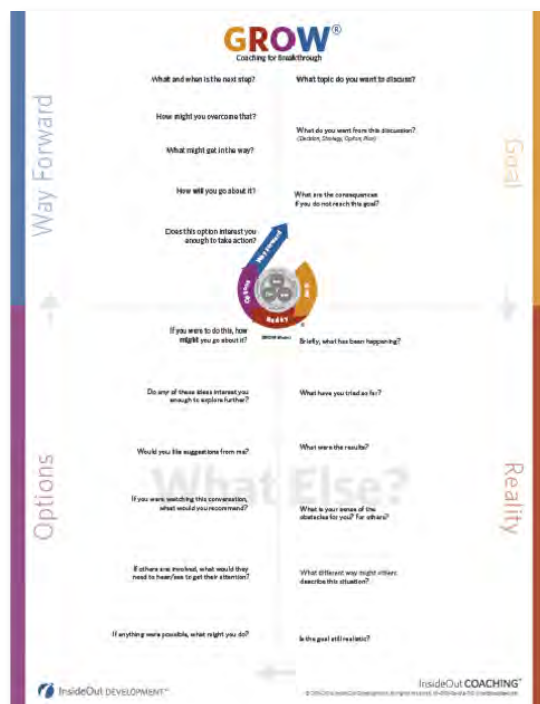
- Check for commitment to one or more of the options explored.
- Discuss possible obstacles and explore workarounds.
- Agree on a timeline for completion.



GROW Model



## GROW® Tips



### To successfully use GROW:

- Follow the process and ask questions in the order they are listed.
- Set a Goal for the discussion (a decision, action, strategy, or plan).
- Don't dwell in Reality.
- Avoid evaluating Options until every idea is on the table.
- Remember to ask "What else?"
- Specify what and when in the Way Forward.
- Resist the urge to offer your opinion or advice too soon.
- Ask the questions as they are, in the ordered listed.



## Your GROW<sup>®</sup> Experience

What did you notice as the coach and as the coachee?

Note any insights from the activity:

What worked?

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Where did you get stuck?

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What would you do differently?

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## GROW® On-The-Go

Note any insights from the activity:

### Goal

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### Reality

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### Options

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### Way Forward

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Notes: \_\_\_\_\_



## MODULE 4

# COACHING CHECK-INS & FEEDBACK

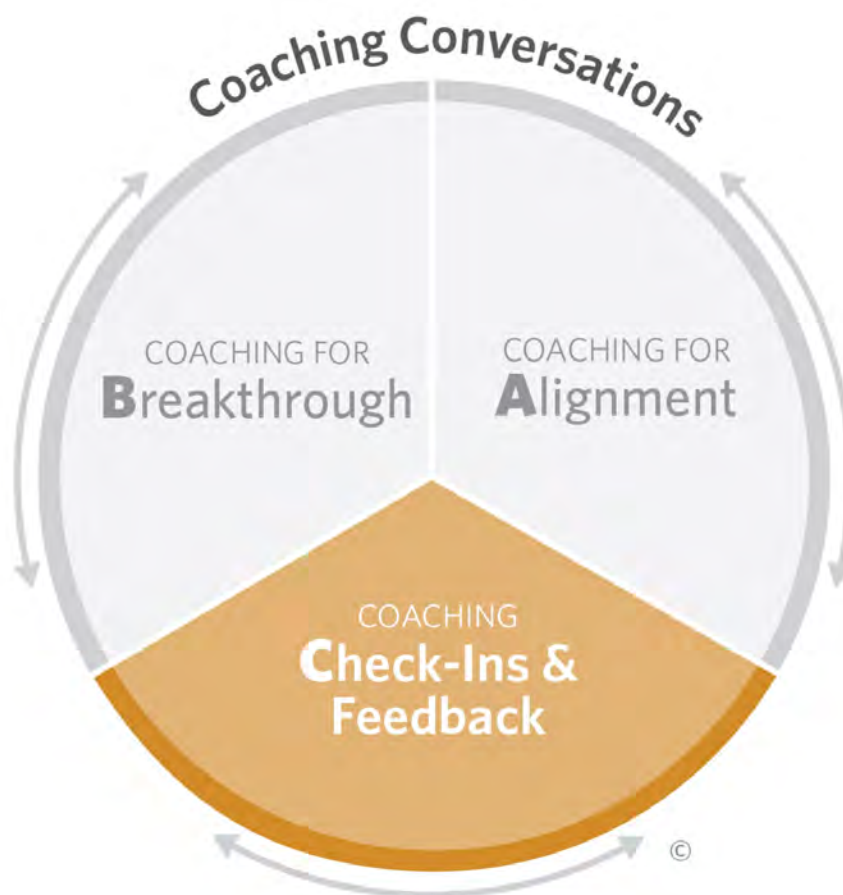
Coaching is most effective when it is continuous, and follow-up and feedback provide daily opportunities to coach.





## Coaching Check-Ins & Feedback

Assess progress and provide feedback.





## COACHING CHECK-INS & FEEDBACK

Follow-up conversations to track progress, provide feedback, and support accountability.

### WHEN TO CHECK IN AND PROVIDE FEEDBACK:

As a coach, it is important to check in regularly and hold others accountable for progress. A check-in is also your opportunity to deliver feedback.

Coaching Check-Ins support commitment, engagement, and accountability and keep people aware, informed, and on the right track.







## Quick-Check Questions

GROW® is a powerful tool for your coaching. However, regular check-ins may not require a full GROW conversation. As an alternative to GROW, or to help assess what stage of GROW you're in, there are three simple questions designed to bring knowledge, skills, and experience out. These are called Quick-Check Questions.

Quick-Check Questions fuel Faith, Fire, and Focus and are a mechanism to get commitment on actions. Use Quick-Check Questions as a tool to diagnose reality and to help you identify what other type of coaching conversation might be needed.

- 1 What's working?
- 2 Where are you getting stuck?
- 3 What might you do differently?



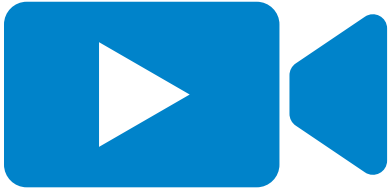
### QUICK-CHECK QUESTIONS

Use as a diagnostic tool to

- Assess reality
- Identify obstacles
- Brainstorm ideas
- Ensure alignment
- Commit to actions



## Video: Giving Feedback



**AS YOU WATCH THE VIDEO, CONSIDER:**

What's your overall reaction to the feedback given to Santa?

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Was it Outside-In or InsideOut feedback?

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What was the impact on Santa's Faith, Fire, and Focus?

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## Delivering Feedback



As a coach, sometimes we drown others in feedback without letting them empty their glass, or give their points of view. When you allow an individual to empty his or her glass first, or to get what's inside out, you:

- Find out what the individual already knows.
- Allow the individual to reflect on his or her current reality.
- Help the individual be accountable for his or her own performance rather than shifting the responsibility to the coach.

Once the individual has emptied his or her glass, you can better provide feedback to fill it up with your perspective.



## Modifying Quick-Check Questions

The Quick-Check Questions are versatile. You can modify or add to them to suit the situation.

### CHECK-IN

#### CONVERSATION

What's working?

Where are you  
getting stuck?

What might you do  
differently?

### FEEDBACK

#### CONVERSATION

What worked?

Where did you  
get stuck?

What would you do  
differently?

Where are your opportunities to check in?

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Notes: \_\_\_\_\_

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## MODULE 5

# COACHING FOR ALIGNMENT

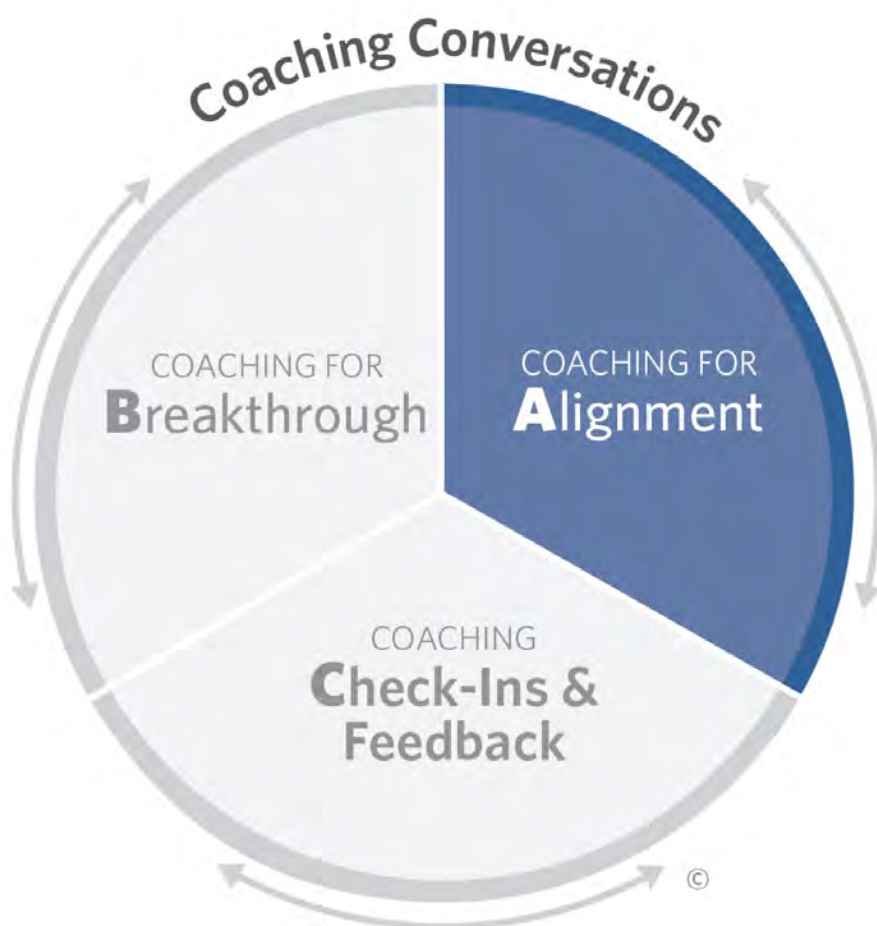
Prepare, Plan, and Practice conversations where you need to get alignment and agreement.





## Coaching For Alignment

Gain alignment and agreement for your goal.





## ALIGNMENT

Alignment is agreement or cooperation among people to achieve a common goal.

### WHEN TO COACH FOR ALIGNMENT:

When someone is unaware of an issue, doesn't know or agree with direction, or maybe even refuses to cooperate, you need to Coach for Alignment.

There are a range of conversations that fall into this category. Some conversations for alignment are easy, while others may be more difficult. Success in Coaching for alignment starts with helping the other person become aware of the difference in alignment, and become willing to engage in a conversation to create alignment.





## Prepare, Plan, Practice

### 1 PREPARE

Use GROW on yourself to get clear on your goal with the other person, the reality you need to share, and the option you'll pursue if you can't get alignment.

### 2 PLAN

Reduce interference for yourself and the individual by mapping out the conversation—what you'll say and anticipated responses from the individual.

### 3 PRACTICE

Discuss your plan with a trusted colleague or friend and practice getting the real words out of your mouth.

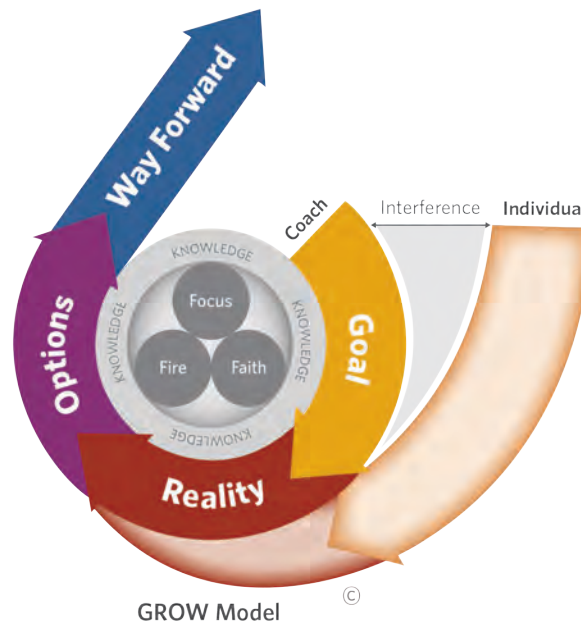


#### COACHING OPPORTUNITIES

If you're in a situation where you need to influence an action or a result, you have an opportunity to coach.



## GROW® for Alignment



### GOAL

- Explain Your Goal
- Share Your Intent

### REALITY

- Share Your Reality
- Ask for Their Reality
- Demonstrate Understanding
- Claim Common Ground about the Core Issue

### OPTIONS

- Ask for Buy-In
- Describe Choices

### WAY FORWARD

- Define Next Steps





## Video: Coaching for Alignment



**AS YOU WATCH THE VIDEO, CONSIDER:**

How did Prepare, Plan, and Practice contribute to gaining alignment?

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What do you observe Alan doing that helps minimize interference?

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What are the differences between the two alignment conversations?

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# The Conversation Planner

[illegible]

The Conversation Planner is the tool that is used to Coach for Alignment and contains three critical steps: Prepare, Plan, and Practice.

Using GROW® as a framework, the Conversation Planner helps you identify the goal, prompt the right dialogue, and guide the discussion.





## Your Prepare, Plan, Practice Experience

### Coaching for Alignment

Note any insights from the activity:

What worked?

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Where did you get stuck?

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What would you do differently?

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## MODULE 6

# GETTING STARTED

Apply your coaching knowledge and use your coaching tools for success.





## Weekly Coaching Routine

The Weekly Coaching Routine is a tool to ensure that you're coaching to your priorities and making progress in your development as a coach. The routine supports building a cadence of coaching with two simple steps: plan and review.

### Step 1: Plan

- Plan your coaching conversations to your business priorities.
- Identify specific goals for each conversation.
- Identify the conversation type to prepare for more productive interactions that make progress on your goals.

### Step 2: Review

- Reflect on your coaching for the week.
- Identify the evidence that you've used the InsideOut Mindset™ and tools in your conversations.
- Target one thing to do over the next week to be a better coach.



## InsideOut Coaching™ At-A-Glance



## InsideOut Coaching™ Tools



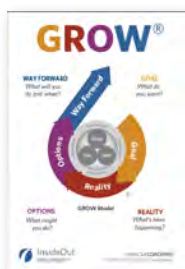
### GROW® Card

A reference card for Coaching for Breakthrough conversations.



### GROW® Card

A reference card for Coaching for Breakthrough conversations.



### GROW® On-The-Go

A wallet-size card for quick Coaching for Breakthrough conversations.



### Quick-Check Questions

A wallet-size card for Coaching Check-Ins and Feedback.



### Conversation Planner

A streamlined planner to help you Prepare, Plan, and Practice for a Coaching for Alignment conversation. Also available as a PDF.



### Weekly Coaching Routine

A weekly guide to align your coaching to your priorities and enhance your coaching effectiveness. Also available as a PDF.



## Coaching Snapshot

Circle the number that best represents the extent to which you do the following (Use the line chart below as a guide.):



### TRUST

1. I create a safe environment for talking about sensitive or personal topics.	1	2	3	4	5	6	7
2. I keep the conversation focused on the agenda of the other person.	1	2	3	4	5	6	7
3. I communicate openly and honestly at all times.	1	2	3	4	5	6	7
4. My commitments relating to each coaching conversation are always made clear to the other person.	1	2	3	4	5	6	7
5. I consistently follow through on my commitments.	1	2	3	4	5	6	7

### EFFECTIVE COMMUNICATION

6. I make it clear when commitments can't be met.	1	2	3	4	5	6	7
7. I set a clear goal for every coaching conversation.	1	2	3	4	5	6	7
8. I keep every coaching conversation focused on achieving agreed- upon goals.	1	2	3	4	5	6	7
9. I help others think of alternative ways to view a problem or solution.	1	2	3	4	5	6	7
10. I help others think of as many ideas or options as they can to solve a problem.	1	2	3	4	5	6	7
11. I listen to new ideas without jumping in to judge or evaluate them too soon.	1	2	3	4	5	6	7
12. I stay objective during coaching conversations.	1	2	3	4	5	6	7
13. I communicate in a way that makes others want to share their ideas or perspective.	1	2	3	4	5	6	7
14. I help others draw their own conclusions when considering different perspectives or approaches.	1	2	3	4	5	6	7
15. I demonstrate understanding by reflecting back or summarizing what was said.	1	2	3	4	5	6	7





1

Strongly  
Disagree

2

Disagree

3

Somewhat  
Disagree

4

Neither Agree  
nor Disagree

5

Somewhat  
Agree

6

Agree

7

Strongly Agree

16. My body language demonstrates a high level of engagement in each conversation.	1	2	3	4	5	6	7
17. I spend more time listening and less time talking.	1	2	3	4	5	6	7
18. I ask helpful questions during conversations.	1	2	3	4	5	6	7
19. I am willing to ask tough questions when needed.	1	2	3	4	5	6	7
<b>PERFORMANCE FOCUS</b>							
20. I always end a coaching conversation by clarifying actions or commitments.	1	2	3	4	5	6	7
21. I support others in setting specific dates for follow-up actions and commitments.	1	2	3	4	5	6	7
22. I help others set priorities based on our organization's business needs.	1	2	3	4	5	6	7
23. I make a clear link between our coaching conversations and job priorities.	1	2	3	4	5	6	7
24. I provide the coaching others need to be more effective on the job.	1	2	3	4	5	6	7
25. Others achieve better results because of the coaching they get from me.	1	2	3	4	5	6	7
<b>COACHING ROUTINE</b>							
26. I regularly make time to help others explore work-related challenges.	1	2	3	4	5	6	7
27. I take time with others to check on their progress.	1	2	3	4	5	6	7
28. I provide the support others need to stay on track.	1	2	3	4	5	6	7
29. I remind others of the commitments they have made.	1	2	3	4	5	6	7
30. I encourage others to take responsibility for their own development.	1	2	3	4	5	6	7



Activity: 4 min each/ total 8 min

## Your Coaching Snapshot

### Coaching Effectiveness

Note any insights from the activity:

What's working?

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Where are you getting stuck?

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What could you do differently?

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## Section 5

# Flying High Activity & Action Planning



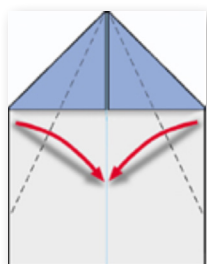
## Table of Contents

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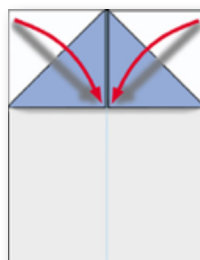
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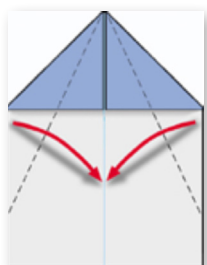
## Flying High - Instructions



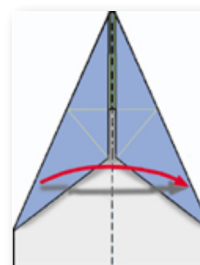
Step 1



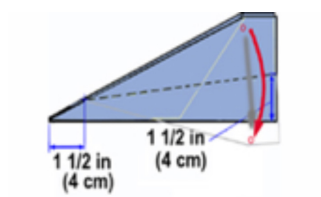
Step 2



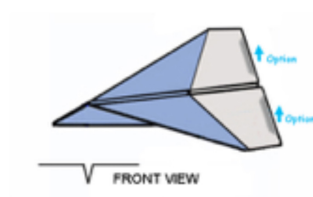
Step 3



Step 4



Step 6



Step 6

- Step 1. Use a sheet of 8-1/2-by-11 inch paper. Fold the paper in half lengthwise and run thumbnail along the fold to crease it sharply. Now, unfold the paper.
- Step 2. Fold down the top corners as indicated by the arrows.
- Step 3. Fold the two edges toward the center line, as indicated.
- Step 4. Make a valley fold in half. Turn the plane 90 degrees as shown in figure of
- Step 5. Create a wing crease that begins at the nose as shown.
- Step 6. Form 3-dimensional shape as shown in figure. The plane is complete. Bend up the tailing edge of the wings for lift if it has a tendency to nose-dive.



## Paper Airplane Specifications

- Company name visible in both sides of the planes
- Company logo visible in both wings
- For the company logo, two colors of pens (red and blue) should be used
- The total plane length must be 11 in = 27.5 cm (1/8 inch of error allowed = 3 mm)
- The height on the rear end of the plane must be 1 ½ in = 4.0 cm (from the lower level to the wing)
- The width of each wing at the rear end of the plane must be 2 ½ in = 6.5 cm
- The planes must have a paper clip inserted vertically at the bottom part, indicating the middle of the length - 5 ½ in = 13.75 cm
- The planes must be inspected by QC (need to have the word “approved” under the right wing, written in blue)
- The planes must fly at least 78 in = 2 m

Important: for each plane that clears, group will receive \$10m, for each plane that doesn't clear \$1m will be subtracted (cost of each plane is \$1m)



## My Individual Action Plan

### What will I do differently as a result of this workshop?

I will: (Describe what you will achieve by applying your learning.)

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### So That:

(Describe the benefit, results of pay-off.)

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### Actions and Target Dates to achieve my goal:

(Experiences, Feedback and Learning to make my goal a reality.)

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This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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