

Nemeon Next Gen Conference

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Partial Client List

- Autodesk
- British Petroleum
- DIRECTV
- Halftime
- Kelley Blue Book
- KPMG
- Los Angeles Times
- Microsoft
- Pacific Symphony
- Symantec
- Trace3
- The Tribune Company

Bob Bernatz

Bob brings over 20 years of experience as a corporate psychologist to his role as a Principal Consultant. His depth of psychological and organizational knowledge serves his clients well to help them maximize their trust, clarity, communication, professional maturity, and overall organizational health.

Bob uses an engaging and collaborative style that allows leadership teams to quickly develop alignment and a clear roadmap leading to measurable cultural change and bottom line results.

Currently, Bob works regularly with CEOs and executive teams to quickly and effectively apply concepts captured in all of Patrick Lencioni's books. His clients are some of the most recognized names in the realms of technology, professional services, media, and non-profits. His experiences allow him to bring a level of understanding, clarity, and influence that is extremely valued by his clients.

Prior to joining The Table Group in 2013, Bob was President of InsightGlobal, a corporate psychology consulting firm, which he founded in 1991. To better serve his clients, Bob also founded the first anonymous interactive feedback platform, VOXopolis.com, which presently serves a worldwide user base. He received his doctorate in psychology from the University of Southern California.

Bob and his wife, Kimberly, live in Newport Beach, California.

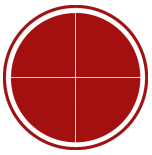
Endorsements

“For over 10 years, the Pacific Symphony has relied on Bob’s expertise to quickly assess and offer collaborative solutions to issues affecting our organization. In addition to being an effective and insightful consultant, he has also become a trusted confidante to our entire leadership team. I have rarely observed someone so committed to making a difference and doing so with such a caring and deft touch.”

—John Forsythe, President, Pacific Symphony

“Bob is an outstanding consultant whose uncanny ability to ask the right questions enabled me to see clearly and create the proper pathway for the firm to follow.”

—D. Randy Regier, President, TAYLOR Architects



Organizational Health Overview

Two Requirements for Organizational Success

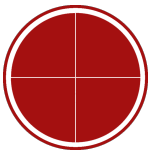
Smart

- Strategy
- Marketing
- Finance
- Technology
- Systems

Healthy

- Minimal Politics
- Minimal Confusion
- High Morale
- High Productivity
- Low Turnover
- High Healthy Conflict

Health receives disproportionately little attention from leaders in most organizations.



Organizational Health Overview

Discipline 1: Build a Cohesive Leadership Team

Cohesive teams build trust, eliminate politics, and increase efficiency by...

- Being open and building trust
- Engaging in constructive ideological conflict
- Committing to clear decisions
- Holding one another accountable for behaviors
- Focusing on collective results

Discipline 2: Create Clarity

Healthy organizations minimize the potential for confusion by clarifying...

- Why do we exist?
- How do we behave?
- What do we do?
- How will we succeed?
- What is most important, right now?
- Who must do what?



Discipline 4: Reinforce Clarity

Organizations sustain their health by ensuring consistency in...

- Hiring
- Managing performance
- Rewards and recognition
- Employee dismissal

Discipline 3: Over-Communicate Clarity

Healthy organizations align their employees around organizational clarity by communicating key messages through...

- Repetition
- Simplicity
- Multiple Mediums
- Cascading messages



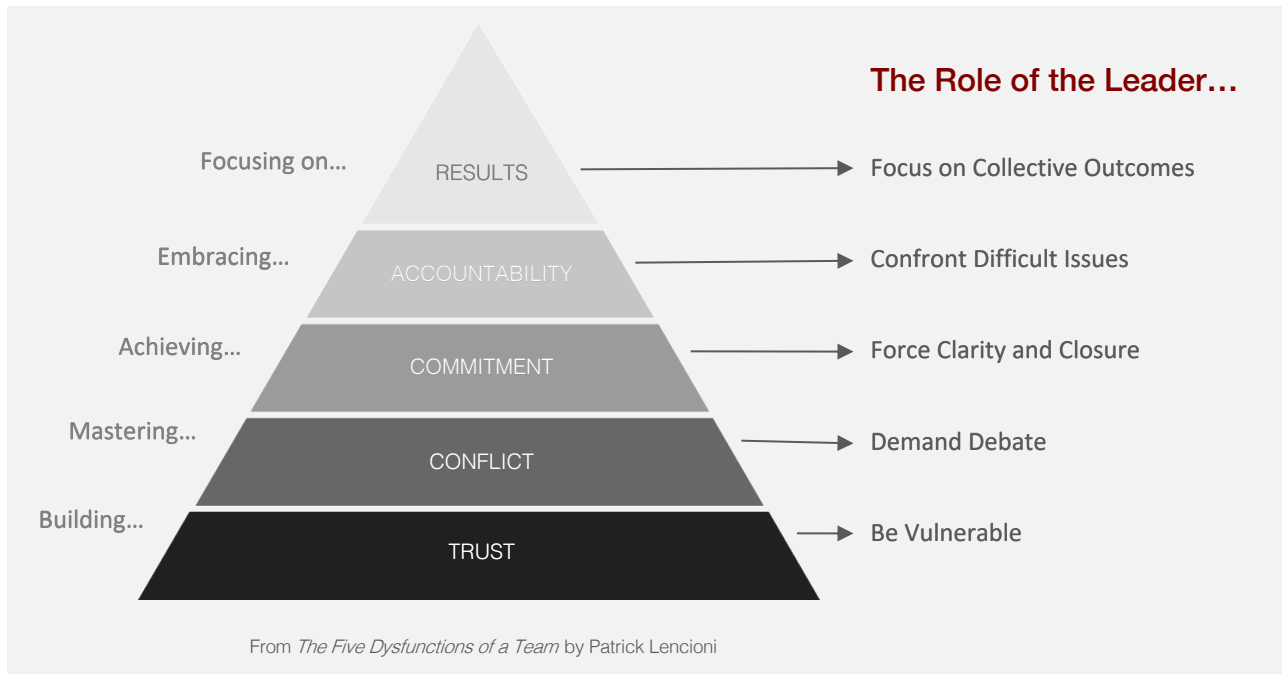
Discipline 1: Build a Cohesive Leadership Team





Discipline 1: Build a Cohesive Leadership Team

The Five Behaviors of a Cohesive Team



- 1. Building Trust:** Team members who trust one another are comfortable being open, even exposed, to one another about their failures, weaknesses and fears.
- 2. Mastering Conflict:** When trust is present, teams are able to engage in unfiltered ideological debate around ideas, issues and decisions that must be made.
- 3. Achieving Commitment:** The ability to engage in conflict and provide input enables team members to buy-in or commit to decisions.
- 4. Embracing Accountability:** After commitment is established, team members must be willing to hold one another accountable for their behaviors and remind each other when actions are counterproductive to the team.
- 5. Focusing on Results:** Collective team results must supersede any departmental or personal objectives or pursuits.

From *The Five Dysfunctions of a Team* and *The Advantage* by Patrick Lencioni.



Discipline 1: Build a Cohesive Leadership Team

MBTI: Where Do You Get Your Energy?

<input type="checkbox"/> EXTRAVERTING	<input type="checkbox"/> INTROVERTING
<input type="checkbox"/> Directs energy and attention outward	<input type="checkbox"/> Directs energy and attention inward
<input type="checkbox"/> Energized by interaction with others	<input type="checkbox"/> Energized by solitary activities
<input type="checkbox"/> Comfortable initiating relationships	<input type="checkbox"/> Gathers information before engaging in relationships
<input type="checkbox"/> Works out ideas by talking them through	<input type="checkbox"/> Works out ideas by reflecting on them
<input type="checkbox"/> Learns best by doing or discussing	<input type="checkbox"/> Learns best by reflection, mental practice
<input type="checkbox"/> Develops a breadth of interests	<input type="checkbox"/> Develops interests in-depth
<input type="checkbox"/> Has many friends/relationships	<input type="checkbox"/> Has a few close friends
<input type="checkbox"/> Easier to get to know	<input type="checkbox"/> Harder to get to know
<input type="checkbox"/> Thinks out loud; tends to speak or act, then reflect	<input type="checkbox"/> Needs time to think before speaking; tends to reflect, then speak and act

Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



Discipline 1: Build a Cohesive Leadership Team

MBTI: How Do You Access/Gather Information?

<input type="checkbox"/> SENSING	<input type="checkbox"/> INTUITING
<input type="checkbox"/> Emphasizes the five senses: see, hear, taste, touch, smell	<input type="checkbox"/> Uses intuition: foresee, imagine, hunch, infer
<input type="checkbox"/> Literal/concrete: focuses on parts and pieces and known facts	<input type="checkbox"/> Figurative/abstract: focuses on patterns, relationships, possibilities
<input type="checkbox"/> "Actual" experience	<input type="checkbox"/> "Symbolic" experience
<input type="checkbox"/> Realistic/tangible	<input type="checkbox"/> Idealistic/conceptual
<input type="checkbox"/> Facts, data	<input type="checkbox"/> Insights, meaning
<input type="checkbox"/> Present or past orientation/"what is"	<input type="checkbox"/> Future orientation/"what might be"
<input type="checkbox"/> Details and pieces to build concepts and patterns	<input type="checkbox"/> Concepts and patterns to focus on details
<input type="checkbox"/> Impatient with theory/abstract	<input type="checkbox"/> Impatient with concrete details
<input type="checkbox"/> Will this work?	<input type="checkbox"/> Could this work?

Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



Discipline 1: Build a Cohesive Leadership Team

MBTI: How Do You Evaluate Information?

<input type="checkbox"/> THINKING	<input type="checkbox"/> FEELING
<input type="checkbox"/> Evaluates based on logic and objective criteria	<input type="checkbox"/> Evaluates based on subjective considerations, personal values
<input type="checkbox"/> Considers laws – impersonal	<input type="checkbox"/> Considers circumstances – personal
<input type="checkbox"/> Focuses on cause and effect/”what”	<input type="checkbox"/> Focuses on the human impact/”who”
<input type="checkbox"/> Places a premium on fairness	<input type="checkbox"/> Places a premium on harmony
<input type="checkbox"/> Good at analyzing plans	<input type="checkbox"/> Good at understanding people
<input type="checkbox"/> Values reasonableness	<input type="checkbox"/> Values compassion
<input type="checkbox"/> Tends to question	<input type="checkbox"/> Tends to accommodate
<input type="checkbox"/> Trusts facts or principles	<input type="checkbox"/> Trusts emotions/personal reactions
<input type="checkbox"/> Distrusts use of emotions only	<input type="checkbox"/> Distrusts use of facts/principles only

Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



Discipline 1: Build a Cohesive Leadership Team

MBTI: How Do You Approach Daily Life?

<input type="checkbox"/> JUDGING	<input type="checkbox"/> PERCEIVING
<input type="checkbox"/> Lifestyle is decided, planned accordingly	<input type="checkbox"/> Lifestyle is flexible, adaptable and spontaneous
<input type="checkbox"/> Enjoys being decisive	<input type="checkbox"/> Enjoys being curious, discovering further options
<input type="checkbox"/> Likes things settled – seeks closure for closure's sake	<input type="checkbox"/> Likes being adaptive – goes with the flow
<input type="checkbox"/> Plans ahead and follows the plan	<input type="checkbox"/> Keeps options open for change
<input type="checkbox"/> Organizes oneself to avoid last minute anxiety/last minute rushes	<input type="checkbox"/> Energized by deadlines and last minute rushes
<input type="checkbox"/> Systematic/structured	<input type="checkbox"/> Casual/open-ended
<input type="checkbox"/> On time, on task, get it decided	<input type="checkbox"/> It will <i>a/ways</i> get done, eventually

Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



Discipline 1: Build a Cohesive Leadership Team

MBTI: Assessment

EXTRAVERTING	<i>Where do you get your energy?</i>	INTROVERTING
SENSING	<i>How do you access/gather information?</i>	INTUITING
THINKING	<i>How do you evaluate information?</i>	FEELING
JUDGING	<i>How do you approach daily life?</i>	PERCEIVING

	E/I	S/N	T/F	J/P
Self Score				
Assessed Type				
Final Type Decision				

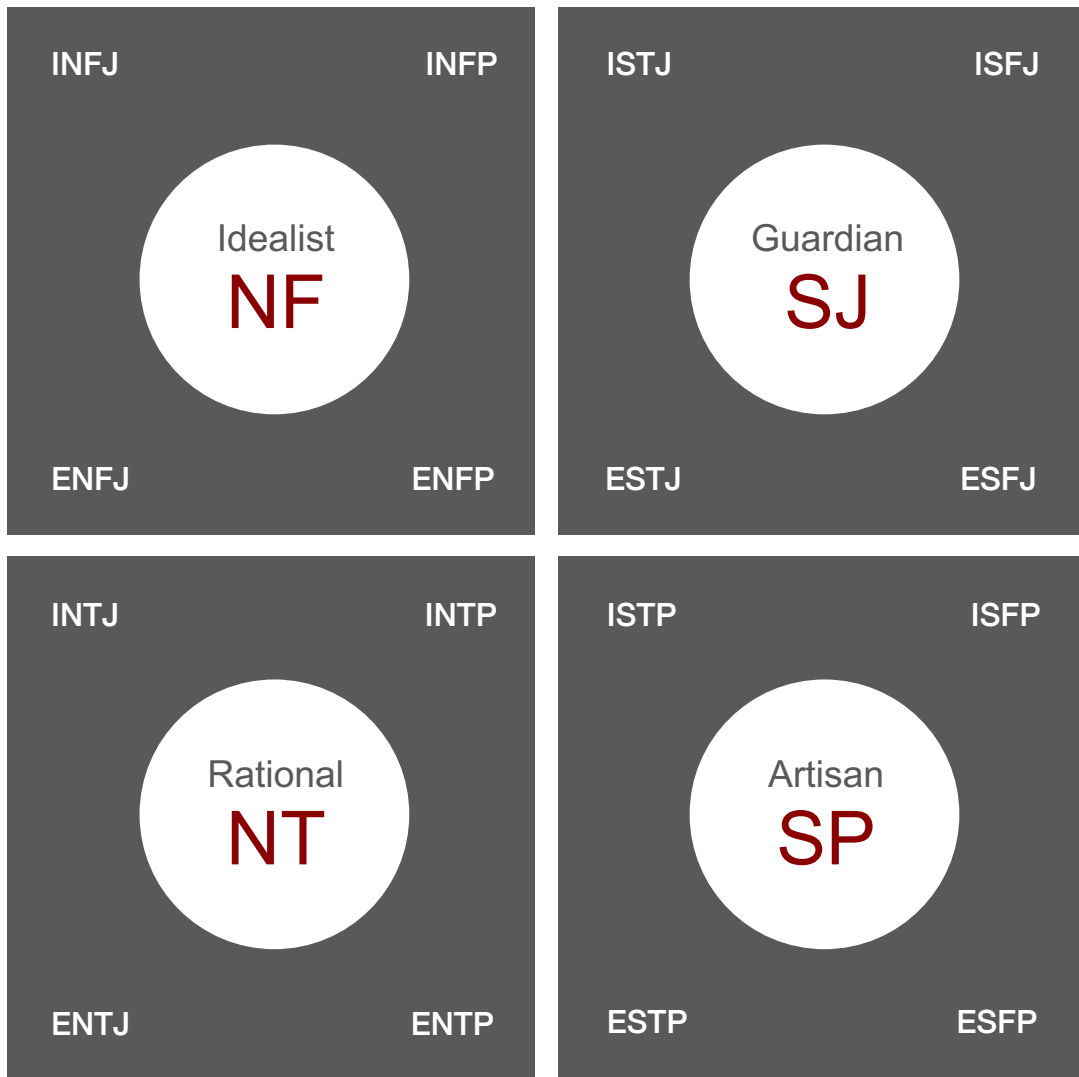
TEMPERAMENT:

Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



Discipline 1: Build a Cohesive Leadership Team

MBTI: Team Temperament



Berens, L., Ernst, L., Robb, J., & Smith, M. (1995). *Type resources, temperament and type dynamics: the facilitator's guide*. Huntington Beach, CA: Temperament Research Institute.



MBTI - Four Temperaments

Abstract / Symbolic

Concrete / Real

Affiliation / Consensus

IDEALIST

Meaning / Significance / Growth

Want to be authentic, benevolent, and empathic. Search for identity, meaning, and significance. Must have meaningful relationships for their life to be worth living, and devote time to nurturing those relationships. Tend to be idealistic and want to make the world a better place. Are future oriented, and trust their intuition, their imagination, and their fantasy. Their focus tends to be on developing potential, through coaching, teaching, counseling and communicating. Generally are enthusiastic, especially about causes that interest them. Their natural thinking style is one of integrating and seeing similarities. They look for universal principles and usually hold a global view. Are gifted in the use of language, both, oral and written. Use metaphors to bridge different perspectives and create harmony. Are usually diplomatic; they put their many people and communication talents to work in the service of their ideals and morale.

GUARDIAN

Membership / Responsibility / Accountability

Want to belong, to have membership in whatever group is theirs. Hunger for responsibility and accountability. Frequently take on too much responsibility and become overworked. Expect others to work hard and be accountable. Favor generosity, service and duty. Establish and maintain institutions and standard operating procedures. Want to preserve the world and protect their charges. Look to the past and tradition for security and standards. Frequently, they foster enculturation with ceremonies, rules and rituals. Trust contracts and authority and distrust chance. Want security and stability. Think in terms of convention, association and discrete elements. Are skilled at ensuring that things and people are in the right place, in the right amounts, the right quality and at the right time. Frequently they gravitate towards business and commerce, especially in the areas where safekeeping and logistics are required.

Pragmatism / Autonomy

RATIONAL

Competence / Intellect / Vision

Seek knowledge, competence, and achievement. Strive to understand what makes the world run and people tick, and are fascinated by and drawn to theories. Future oriented, and trust logic and reason. Want to have a rationale for everything and are natural skeptics. Think in terms of differences, delineating categories, definitions, structures and functions. If their job is too routine, they formulate hypotheses and theories to make it interesting. They hunger for precision, especially in thought and language. Long-range planning, inventing, designing and defining are their areas of strength and they bring these gifts to any job even if these are not called for. Their mood is generally calm and they prefer a peaceful environment. They foster individualism rather than conformity. Frequently they gravitate toward technology and the sciences and are well suited for engineering and devising strategy.

ARTISAN

Action / Grace/ Spontaneity

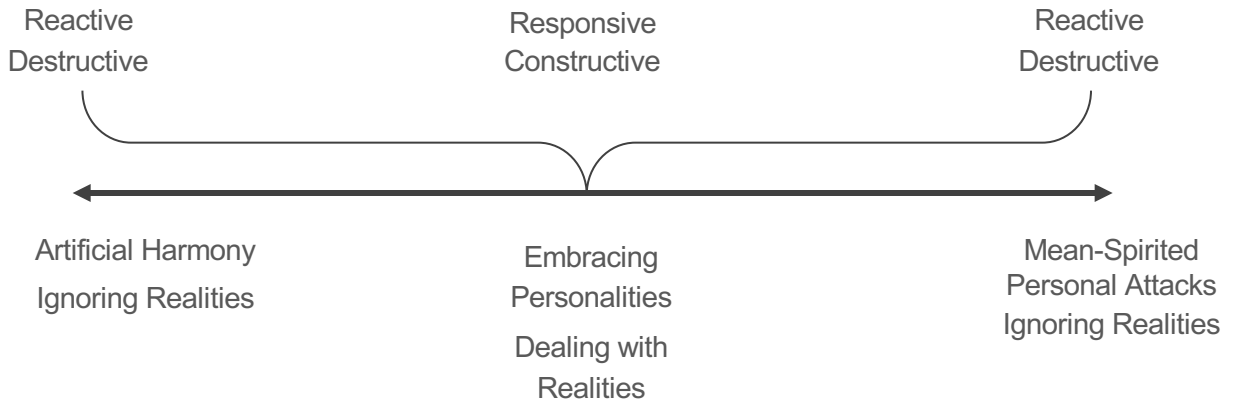
Want the freedom to choose the next act, and must experience and act on impulses. Want to be graceful, bold and impressive and to have an impact on their "audience." Are generally excited and optimistic, expecting lady luck to be on their side. May become so absorbed in the action of the moment that they lose sight of distant goals. The flip side: they see opportunities that others miss. Are oriented toward the present and they seek adventure and experiences. They hunger for spontaneity. Trust their impulses, luck and their ability to solve any problem they run into. Are natural negotiators and enjoy getting others to concede evens some small part. No matter what their job, they will find some way to vary it. Have a keen ability to notice and describe detail. They like the freedom to move, festivities and games. Frequently they are drawn to the manual, visual and performing arts as well as entrepreneurial aspects of business.

Berens, L.& Isachsen, Olaf. (1995). *Working Together*. Irvine, CA: Institute for Management Development.



Discipline 1: Build a Cohesive Leadership Team

Conflict Continuum



Strategies for managing conflict:

Real-time permission:

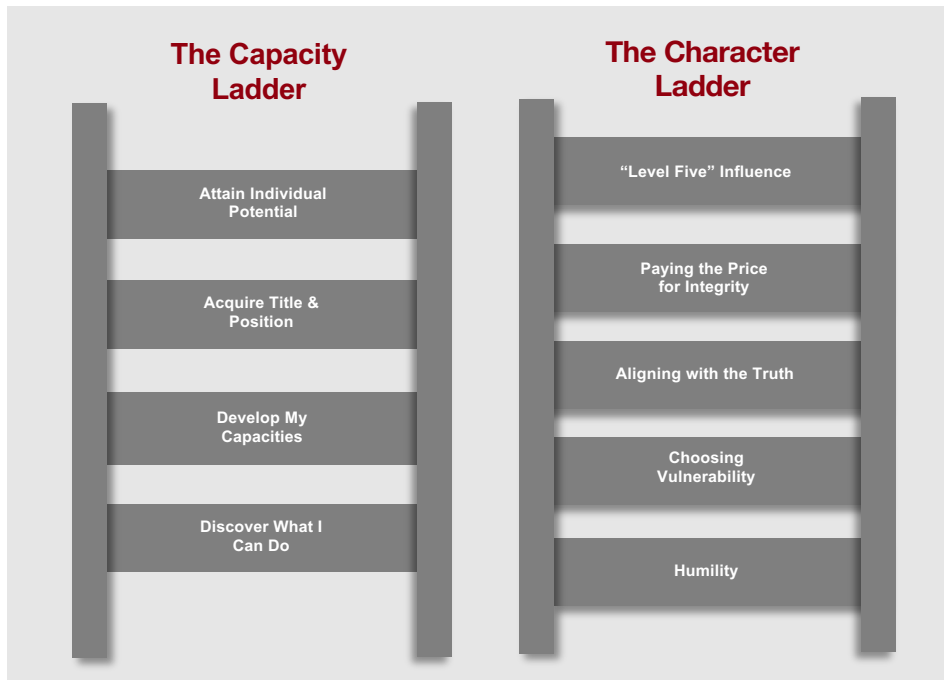
- The concept whereby a leader or facilitator interrupts a team member in the midst of healthy debate to reinforce the behavior. Real-time permission is best used when team members are not yet comfortable with conflict and need to be reminded of its importance so that they can avoid unnecessary feelings of inappropriateness.

Mining for conflict:

- A facilitation skill that requires an individual to extract buried disagreements within a team and bring them to the surface. The "miner" must remain objective during meetings and be committed to the conflict until it is resolved.



The Capacity & Character Ladders



Climbing the Two Ladders . . . Together

Think of a very gifted leader who has fallen or finished poorly. What do you think hindered such capable leaders in the process of their character development?

What life experiences stimulated the most growth in your character? Who was influencing your life at the time?

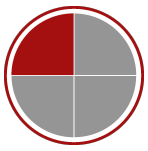
What happens to leaders when there is a disconnect between "being" and "doing"? What happens to the followers and organization?

How can we, our team and fellow team members avoid the same pitfalls of a stunted Character Ladder?

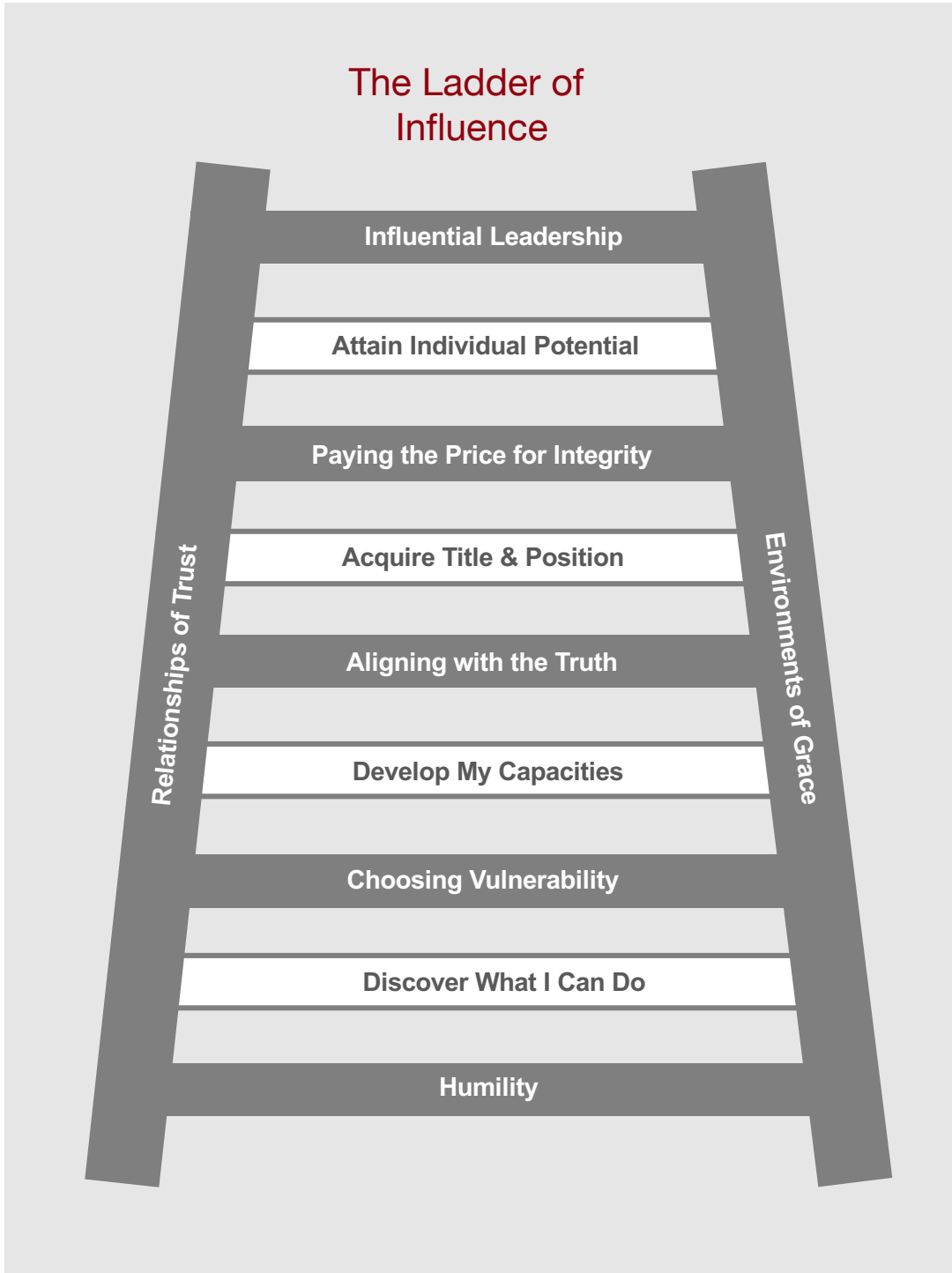
Integrity elicits trust from others. It develops when I have the permission to be honest about . . . Who I am. Who am I not. What can I do. What can't I do.

Integrity allows trust to be earned so that you can give love, teach truth and provide guidance. It can only develop in a safe environment of trust and grace.

From *The Ascent of a Leader* authors Bill Thrall & Bruce McNicol



The Ladder of Influence



From *The Ascent of a Leader* authors Bill Thrall & Bruce McNicol



Discipline 2: Create Clarity





Discipline 2: Create Clarity

The Six Critical Questions

Teams must be in alignment around the six critical questions that define their business and where it is headed. These include the following:

1

WHY DO WE EXIST?

The organization's core purpose, beyond making money.

2

HOW DO WE BEHAVE?

The limits of diversity that can exist within the organization – the core values that all employees must share to thrive.

3

WHAT DO WE DO?

A simple statement that defines the organization's business.

4

HOW WILL WE SUCCEED?

The anchors that define the strategy of the organization.

5

WHAT IS MOST IMPORTANT, RIGHT NOW?

The organization's rallying cry and over-arching objectives that are shared across the leadership team.

6

WHO MUST DO WHAT?

The role of each leader in achieving those objectives.



Discipline 2: Create Clarity

Question 1: Why do we exist?

*“Employees in every organization, and at every level, need to know that at the heart of what they do lies something grand and aspirational.” Pat Lencioni, *The Advantage**

Examples of Core Purpose

Southwest: Original: To democratize air travel
Current: To connect people to the important events in their lives

Mary Kay Cosmetics: To give women unlimited opportunities

Merck: To eliminate pain and suffering in the world

Sierra Cascade Nursery: To give local families jobs and opportunity

Notes:



Discipline 2: Create Clarity

Question 2: How do we behave?

*“The answer to this question is embodied in an organization’s core values, which should provide the ultimate guide for employee behavior at all levels.” Pat Lencioni, *The Advantage**

Examples of Core Values

Apple: Creative, Wickedly Smart, Slightly Rebellious

Nordstrom: Service to the customer above all, professional reputation, being part of something special.

Southwest Airlines: Servant’s Heart, Fun LUVing Attitude, Warrior Spirit

Notes:



Discipline 2: Create Clarity

Values Model



Aspirational Values

These values are purposefully established to meet requirements of a market or industry. A company may need to develop a particular value among their people to compete or support a strategy. Aspirational values need to be actively managed to ensure the values stick—as they can sometimes seem in conflict with the core.

Permission-to-Play Values

These are the base-line behavioral traits that are required of any employee (often described as standards or mistaken for core values). They include minimum standards of ethics and social appropriateness. Similar to core values, permission-to-play values are so embedded within an organization that they can often be taken for granted.

Accidental Values

These are the values that begin to appear in an organization without being cultivated actively by leadership. They are often observable and tangible. Accidental values are the manifestation of common interests or the perceived personality of the organization (i.e. demographics of the employees, unique attributes of the office space/environment etc.). If these values are mistaken for core, an organization's values program can be thwarted.



Discipline 2: Create Clarity

Question 3: What do we do?

“Every organization needs an unsexy, one sentence definition of their business.”

Pat Lencioni, *The Advantage*

Examples of a Business Definition

Nike: We design, manufacture, market and sell athletic shoes, apparel, accessories and equipment.

Merck: We research, develop and commercialize pharmaceuticals.

Southwest: We market, book and transport passengers via airplane through commercial airports.

Notes:



Discipline 2: Create Clarity

Question 4: How will we succeed?

“An organization’s strategy is the collection of intentional decisions a company makes to give itself the best chance to thrive and differentiate from competitors. Every organization should have three strategic anchors that will inform every decision the organization makes and provide the filter through which decisions must be evaluated to ensure consistency.”

Pat Lencioni, *The Advantage*

Examples of Strategic Anchors

Southwest

Original: On-Time, Low Cost, Customer Loyalty

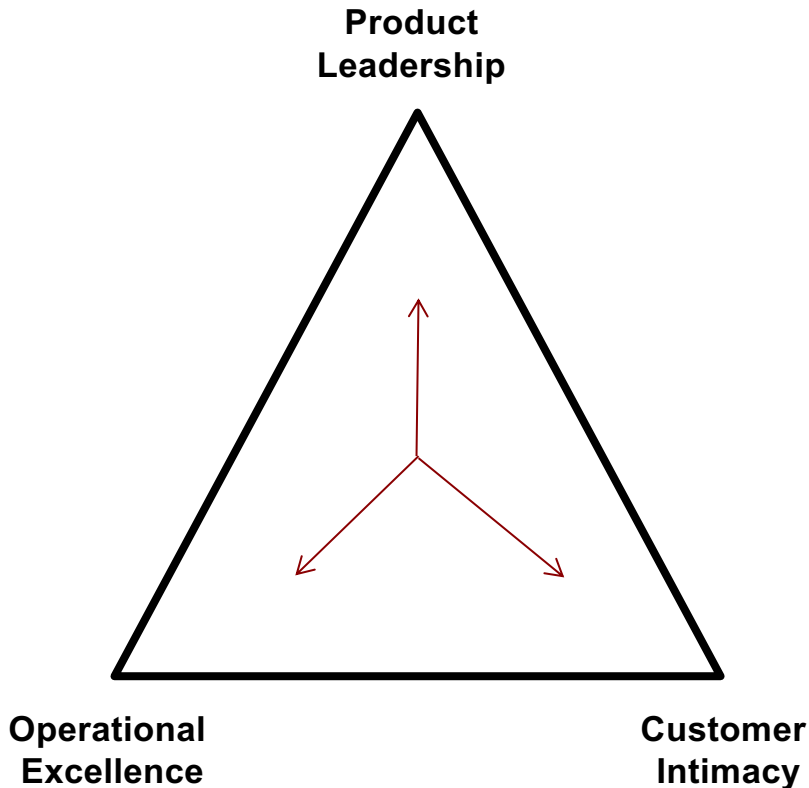
Current: The Most Friendliest, Reliable and Least Expensive Airline in the World

Notes:



Discipline 2: Create Clarity

The Discipline of Market Leaders



Operational Excellence

Provide the customer with reliable products or services at competitive prices, deliver with minimal difficulty or inconvenience (Walmart, McDonalds & Fedex)

Product Leadership

Providing products that continually redefine the state of art (Nike, Apple & Tesla)

Customer Intimacy

Selling the customer a total solution, not just a product or service (Four Seasons, Nordstrom & American Express)

(M. Treacy & F. Wiersema, 1995)



Discipline 2: Create Clarity

Thematic Goal

Hypothetical – A well-known tire company

Survive-
by Re-Establishing
Credibility

The single, temporary, and qualitative **Rallying Cry**
shared by all members of the team

Fix Tires

Improve
PR

Repair
Distributor
Relations

Address
Morale

Settle
Lawsuits

The temporary, qualitative components of the thematic goal;
shared by all members of the team

Revenue

Expenses

Production
Levels

Market
Share

Customer
Satisfaction

The ongoing priorities of the organization;
shared by all members of the team



Discipline 2: Create Clarity

Question 5: What is most important, right now?

The answer to this question is an organization's rallying cry or Thematic Goal – the **single most important priority**. (e.g. "If we accomplish only one thing during the next 3-12 months, what would it be?")

Thematic Goal

The single, temporary and qualitative rallying cry shared by all members of the team.

Defining Objectives

The temporary qualitative components of the thematic goal; shared by all members of the team.

Standard Operating Objectives

The ongoing priorities of the organization; shared by all members of the team.



Discipline 2: Create Clarity

Defining Objective Battle Plan

Defining Objective:

Champion(s):

Using plain and simple language, describe what you are trying to achieve.

Definition of Success

How and when will you know that you have been successful on this defining objective?

Chronological Steps

What are the 3 to 5 key steps you will need to accomplish for this defining objective?

1)

2)

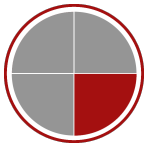
3)

4)

5)

Obstacles

What are the main obstacles to achieving this objective ... that *must* be dealt with?



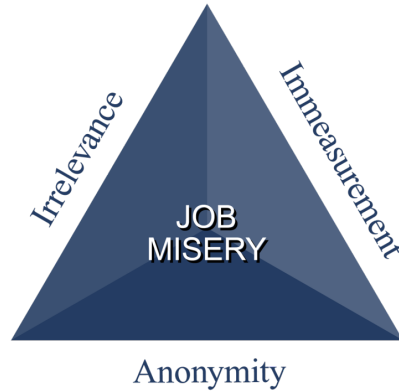
Discipline 3: Over-Communicate Clarity





Discipline 4: Reinforce Clarity

The Truth About Employee Engagement



Anonymity

People cannot be fulfilled in their work if they are not known. All human beings need to be understood and appreciated for their unique qualities by someone in a position of authority. People who see themselves as invisible, generic or anonymous cannot love their jobs, no matter what they are doing.

Irrelevance

Everyone needs to know that their job matters, to someone. Anyone. Without seeing a connection between the work and the satisfaction of another person or group of people, an employee simply will not find lasting fulfillment. Even the most cynical employees need to know that their work matters to someone, even if it's just the boss.

People cannot be motivated by salary forever. They need to know that they are an important part of a organization that is doing greater things than providing just a service or selling a product. Knowing that their contribution matters, inspires and motivates beyond the paycheck. It makes the world a better place and gives every team member an important role and responsibilities to meet that goal.

Immeasurement

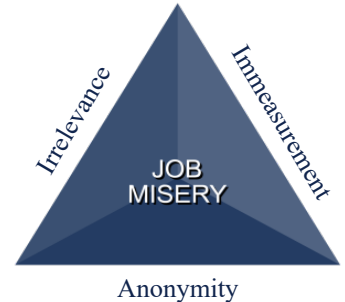
Employees need to be able to gauge their progress and level of contribution for themselves. They cannot be fulfilled in their work if their success depends on the opinions or whims of another person, no matter how benevolent that person may be. Without tangible means of assessing success or failure, motivation eventually deteriorates as people see themselves as unable to control their own fate.

This model originated from Lencioni's national best-seller, *The Three Signs of a Miserable Job*.



Discipline 4: Reinforce Clarity

The Truth About Employee Engagement



Anti-Misery Worksheet

Employee name _____ Date _____

Sign	Notes	Action or Plan
<p>Anonymity</p> <p>Employees who aren't known and individually appreciated by their managers will not be fulfilled in their jobs.</p>	<p>Use this space to jot down information about your employee.</p>	<p>Use this space to record your plans for eliminating anonymity from your employee's job. Be specific and include dates for completion.</p>
<p>Irrelevance</p> <p>Employees who don't know how their work impacts the lives of others will not be fulfilled in their jobs.</p>	<p>Use this space to write down thoughts about how your employee impacts others in his/her job.</p>	<p>Use this space to record your plans for eliminating irrelevance from your employee's job. Be specific and include dates for completion.</p>
<p>Immeasurement</p> <p>Employees who can't assess their own level of performance and success will not be fulfilled in their jobs.</p>	<p>Use this space to write down ideas about how your employee can assess or measure his/her contribution or performance.</p>	<p>Use this space to record your plans for eliminating immeasurement from your employee's job. Be specific and include dates for completion.</p>

This model originated from Lencioni's national best-seller, *The Three Signs of a Miserable Job*.



Discipline 4: Reinforce Clarity

Intention-Based Leadership Ladder *(Turn the Ship Around, 2012 by L. David Marquet)*

Team Member Says

- I've been doing . . .
- I've done . . .
- I intend to . . .
- I would like to . . .
- I recommend . . .
- I think . . .
- Tell me what to do?

Team Leader Says

- What have you been doing?
- What have you done?
- What do you intend to do?
- What would you like to do?
- What do you recommend?
- What do you think?
- I'll tell you what to do.

Team Questions

In your role, where are you on the ladder?

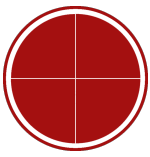
What gets in the way of moving up the ladder in your role?

What are your personal goals for working here?

What gets in the way of doing your specific job?

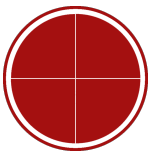
What are the biggest challenges that get in the way of this company reaching its goals?

What is the best thing that your team leader can do for you now?



The Four Meetings

MEETING TYPE	TIME REQUIRED	PURPOSE/ CONTEXT	KEYS TO SUCCESS
Daily Check-in	5 - 10 minutes	ADMINISTRATIVE: Connect informally around any relevant administrative items	<ul style="list-style-type: none">• Don't sit down• Keep it administrative• Don't cancel even when some people can't be there
Weekly Tactical:	45 - 90 minutes	TACTICAL: Review scorecard, and resolve critical tactical obstacles and issues	<ul style="list-style-type: none">• Don't set agenda until after initial reporting• Postpone strategic discussions
Adhoc Strategic Topical:	2 - 4 hours	STRATEGIC: Discuss, analyze, brainstorm and decide upon a critical issue affecting long term success	<ul style="list-style-type: none">• Focus on a specific topic• Prepare in advance• Fully embrace conflict
Quarterly Off-site Review	1 - 2 days	DEVELOPMENTAL: Review playbook (team development, dynamics and clarity) as well as competitive landscape, industry trends, key personnel	



Weekly Staff Meeting Guide

I. Lightning Round (5-10 minutes)

Ask each team member to list the Top 3 things to discuss today. This should take no longer than 1 minute per person.

III. Weekly Tactical Agenda Items (30 minutes)

Discuss the potential tactical issues to be covered, assign an order for that discussion and dive in. These issues may have arisen either in the lightning round or the Scoreboard Review.

V. Decisions/Actions (5 minutes)

Ask one team member to chart the decisions and actions that were committed to during the meeting. Team leaders should note these as well.

II. Scoreboard Review (5 minutes)

Review the thematic goal and defining objectives of your business and note the current status of each.

IV. Potential Adhoc Strategic Topics

As you progress through your meeting, use this area to note the topics that you need to cover during a strategic meeting. Be sure to resist the temptation to resolve them right away.

VI. Cascading Messages (5 minutes)

Now, discuss what, if anything, each team member should communicate to their direct reports from the meeting. Agree on a timeframe for that communication to happen.



Team Effectiveness Exercise

In this exercise, take a moment to write down what each of your colleagues does well, what they should keep doing and how they could make improvements to help the team be more productive.

NAME	KEEP DOING	NEEDS TO IMPROVE

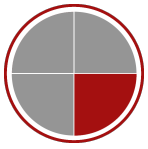


Team Effectiveness Exercise

Use the space below to keep track of peer feedback and your commitments for development.

MY COMMITMENT

MY ASK OF THE TEAM



Team Commitments

Cascading Communications

“Cascading Communications begins the structured but interpersonal process of rolling key messages down through the organization directly from the leadership team.”

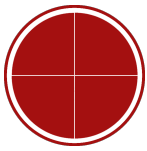
Pat Lencioni, *The Advantage*

We Discussed:

We Decided:

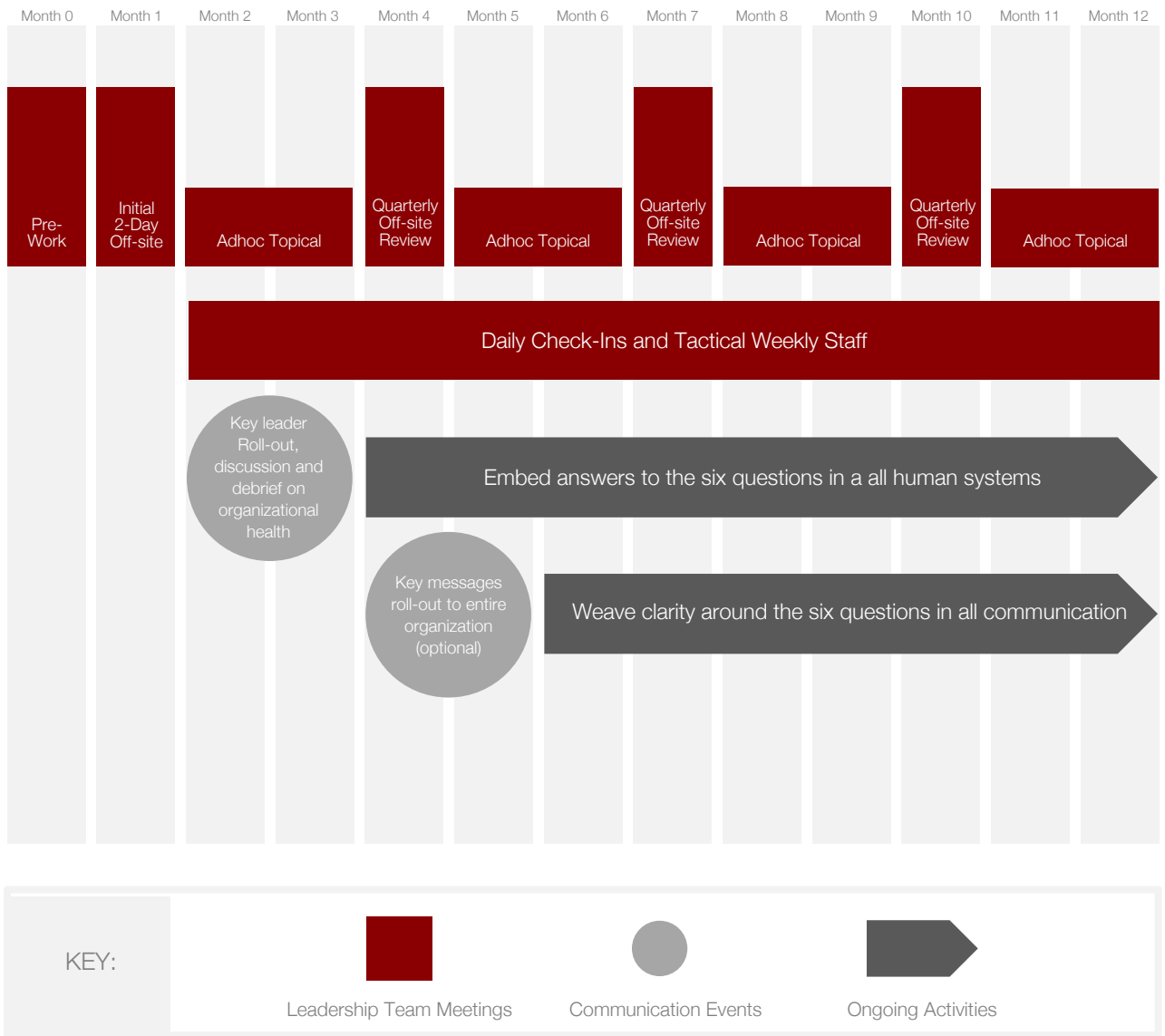
What NOT to Say:

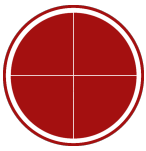
Cascading Messages:



Road Map to a Healthy Organization

The transformation to a healthy organization can be done in short order with the appropriate effort and focus. The following road map provides a typical approach to working through the Four Disciplines from *The Advantage*.

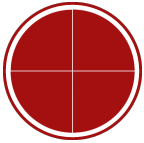




Road Map to a Healthy Organization

Leadership Team Meetings

Communication Events



■ Pre-Work

The first step in creating a healthy organization is to prepare the executive team for the effort. This includes having each leader read *The Advantage*, and complete any assessments required for the initial two-day off-site (i.e. The Five Dysfunctions online team assessment and personality profile). At this point, it's helpful to identify a resource to assist the leader with managing the entire process.



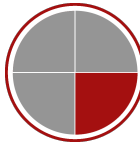
● Key Leader Roll-out

Once the leadership team has built unwavering commitment to the answers to the six critical questions (this should happen around month 2 or 3), the next step is to cascade those messages to the organization. A key leader roll-out session should include an opportunity to build support from the next level of leaders, and to get their feedback



■ Initial Two-day Off-site

An initial two-day leadership team off-site is the starting point of any organizational health effort. During this session, you should plan to make significant progress on becoming a more cohesive team (discipline 1), as well as clarifying the team's answers to the six critical questions (discipline 2). The team should also commit to a meeting structure and develop a plan to finalize and communicate the answers to the six critical questions and other key off-site take-aways.



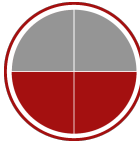
● Organizational Roll-out

With the second level of leaders on board, the next step to organizational health is to create and begin executing an overall communication plan. This plan will vary by company and situation. Some organizations will be ready for a formal roll-out, while others will require a more subtle introduction to all employees.



■ Adhoc Topical

Following the initial two-day off-site, teams will meet regularly (monthly at a minimum) to discuss topics of a strategic nature. It's useful to create a prioritized list of topics and assign responsibility for driving those meetings. These topics will vary and most likely be in support of the organization's thematic goal. The very first adhoc topical meeting will likely address solidifying the answers to the six critical questions. From there, they will be held on an as-needed basis.



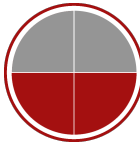
▶ Human Systems

To help organizational clarity take root, work must be done to ensure all human systems reflect the answers to the six critical questions. Over a period of time, each system and process should be reviewed for alignment with organizational clarity and modified accordingly.



■ Quarterly Off-Site Review

Throughout the year, a leadership team should meet for their quarterly off-site review. This meeting provides an opportunity for the team to continue to address their cohesiveness, as well as to step back and question how healthy their organization is. It will also be a venue to determine next steps required to move the organization to the next level.



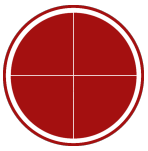
▶ Communication

With the leadership team fully on the same page, they must now make every effort to embed the answers to the six critical questions in all organizational communications, even subtly.



■ Daily Check-ins and Weekly Staff Meetings

Leadership teams must institute discipline around their meetings to ensure they are focused on the right things at the right time. A team should meet on a daily basis to share immediate priorities, and they must also meet on a weekly basis to review progress against the organization's thematic goal. These two meetings provide a rhythm for the leadership team that will drive and sustain a healthy organization



Road Map to a Healthy Organization

Organizational Health Survey (template)

1) Culture

Use five words to describe the workplace culture at your company.

2) Clarity

What is your company's **Core Purpose**? (Why do we exist?)

What is your company's **Business Definition**? (What business are we in?)

What are your company's **Core Values**? (How do we behave?)

What are your company's **Strategic Anchors**? (How will we succeed?)

What is your company's **Thematic Goal**? (What is the most important thing?)

3) How likely is it that you would recommend your company as a place to work?

4) Why did you choose that score?

5) Around your company, what behaviors are acknowledged or recognized?

6) If you could change one thing at your company what would it be?