Intentional Leadership Guide

Intentional Leaders have high levels of *Self and Team Awareness* and develop their intellectual, emotional, and social intelligence. They practice mindfulness and are thoughtful and deliberate in everything they do.

They bring people together by creating a strong team culture and aligning attitudes, behaviors, and activities to pursue a set of common goals. They do this through the development and deployment of *Shared Mission, Vision, Values, and Strategy*.

Intentional Leaders work to become excellent communicators who adapt their natural communication style to meet the team's needs and ensure *Clarity of Roles and Processes*. They are also confident enough to reveal their own vulnerabilities with the understanding that the willingness to show vulnerability itself is a strength and that no leader has all the answers. They establish high levels of *Trust* in the team to the degree that all team members feel respected and empowered to voice their own opinions without fear of recrimination. This leads to high levels of diversity of thought and *inclusion,* where diversity is not only respected but embraced and leveraged.
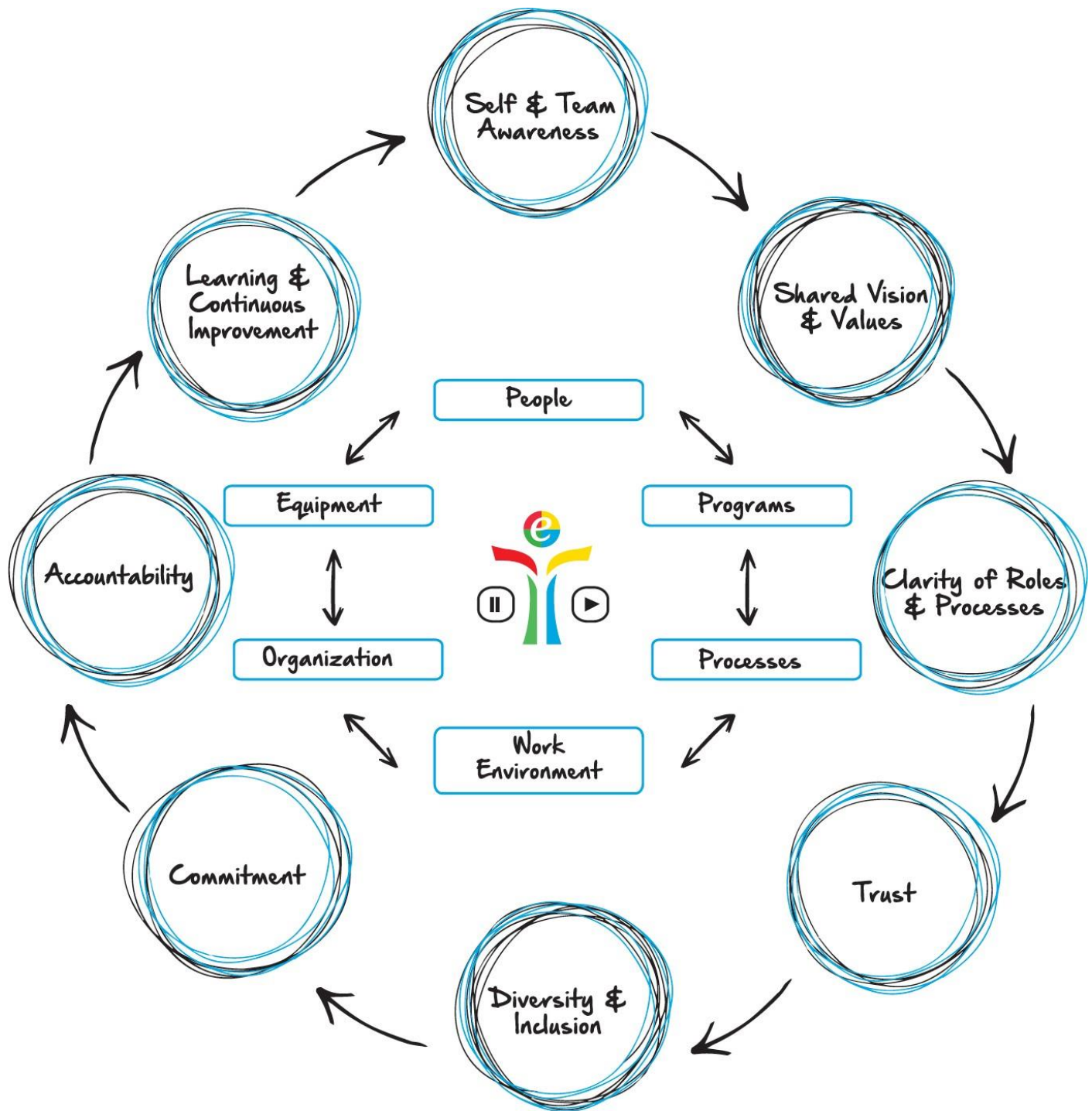
Intentional Leaders realize that 100% consensus on a team is rarely achievable, but 100% *commitment* is possible when there is effective communication and clear mutual expectations. When team members know that if they voice their opinions, ideas, and concerns, their teammates will genuinely listen to them.

With *Commitment* comes *Accountability*. Members of high-performing teams are comfortable holding themselves and others accountable for their attitudes, actions, and behaviors.

Finally, Intentional Leaders live their lives in a state of *Learning and Continuous Improvement. T*hey encourage and inspire their people to do the same. Reading, listening, planning, briefing, and debriefing become ingrained habits.

For simplicity, this definition can be visualized using what we call the Essential Leadership Cycle (see next page), which we will use as the basis of this self-assessment.

For more information on Intentional Leadership, the Essential Leadership Cycle, or Safety and Performance Improvement visit www.improvewithfit.com.
Additional resources are also available at https://online.improvewithfit.com

The Essential Leadership Cycle

1. AERO systems

The task-based system is how individuals interact with people, programs, processes, work environments, organizations, and equipment and how these all interact with each other. Individuals *being aware of and managing their personality tendencies* enables a more effective interaction of the individual with this system, reducing errors and events. This system is surrounding tasks at home, work, and play. This system equally impacts safety, quality, effectiveness, efficiency, and productivity. People will use this system because it works for THEM.

Individuals on any task will use the *hierarchy of inputs* to determine what their brain will naturally gravitate to. This tends to mask risk from a systemic driver that the individual does not naturally look for or see first. Individuals at all levels of the organization can be taught to manage these tendencies and see and manage risk more holistically.
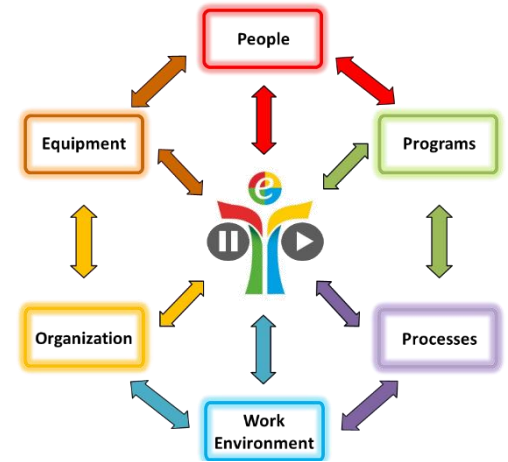

Figure 2: Task Based System

The Essential Leadership Cycle depicts how an organization controls and manages the task-based system. It is the best way for leaders to understand that the individual's actions and behaviors are driven by elements or changes in the system. Leaders use the Essential Leadership Cycle to effectively manage the organizational and systematic drivers in the Task-Based System. Failures in the organization to effectively control the Essential Leadership Cycle lead to some of the organizational causes of serious incidents.
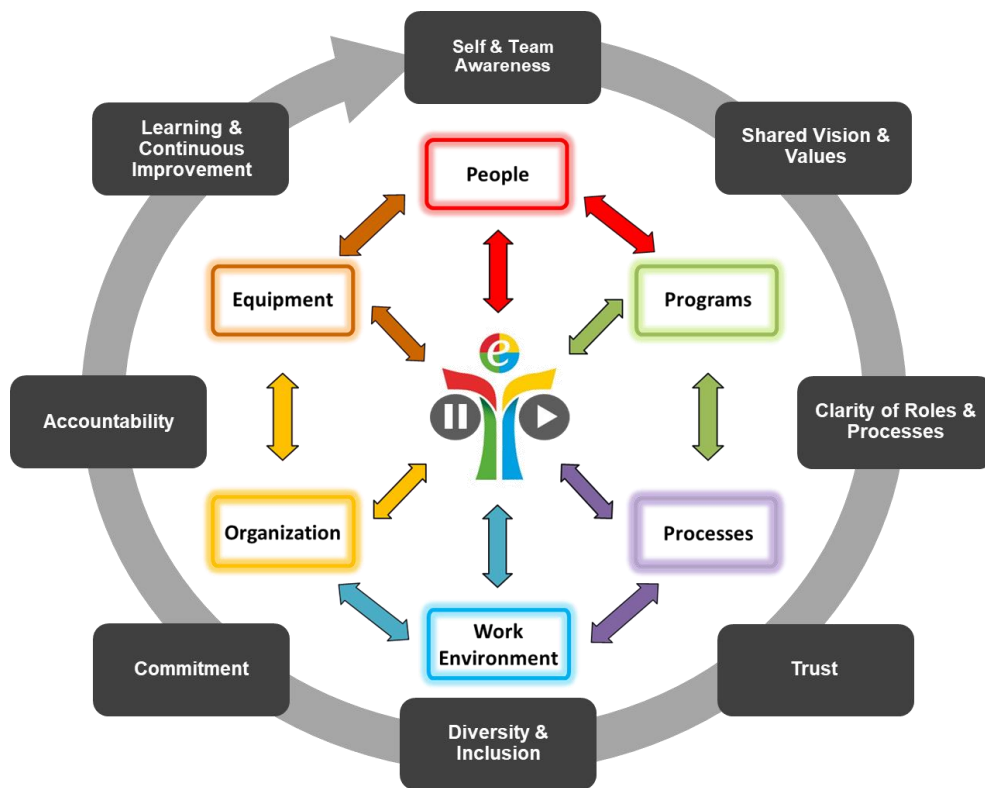

Figure 3: The Essential Leadership Cycle

2. Personality tendencies

Individuals with different personality tendencies see and manage risk differently. It doesn't matter whether a leader makes a critical decision, a supervisor trying to evaluate and manage a critical task, or a group of workers attempting to perform the task. Understanding our personality tendencies, strengths, and potential limiters makes us more effective at managing risk and reducing errors.
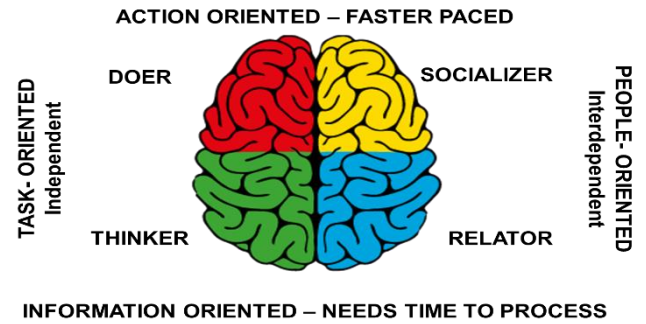

Figure 4: The E-Colors Brain Model

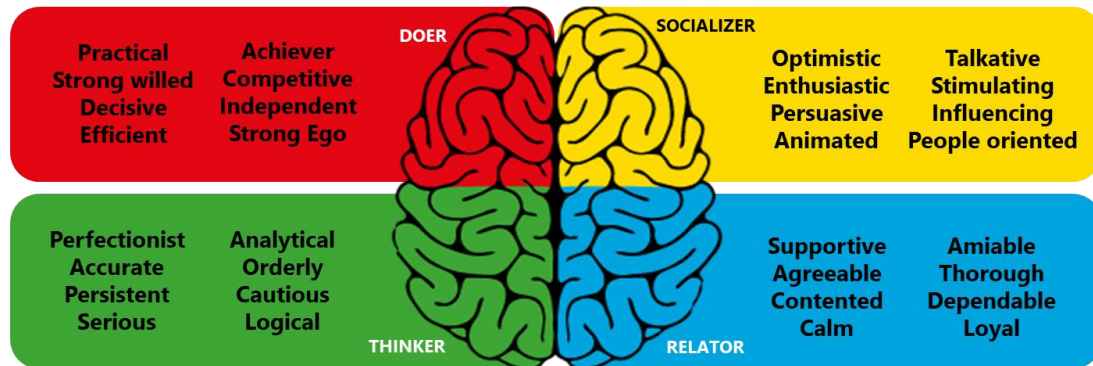## Strengths, Potential Limiters, & How Different Personalities Can Get Hurt…
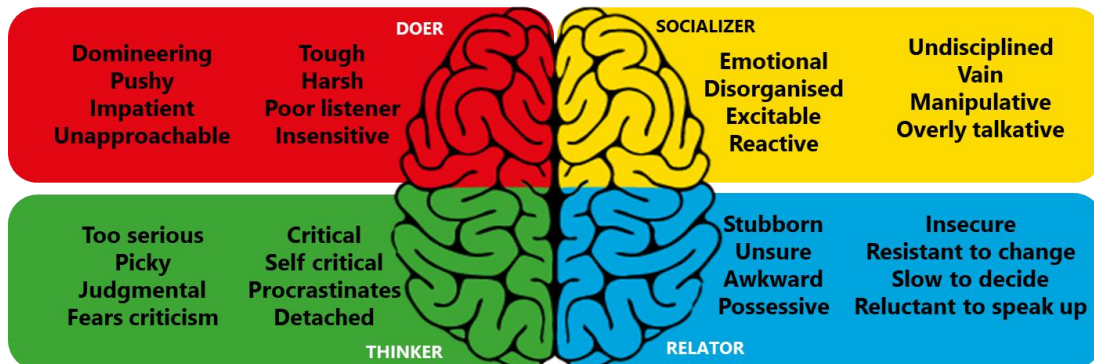

Figure 5: Personality Based Strengths

Figure 6: Personality Based Potential Limiters
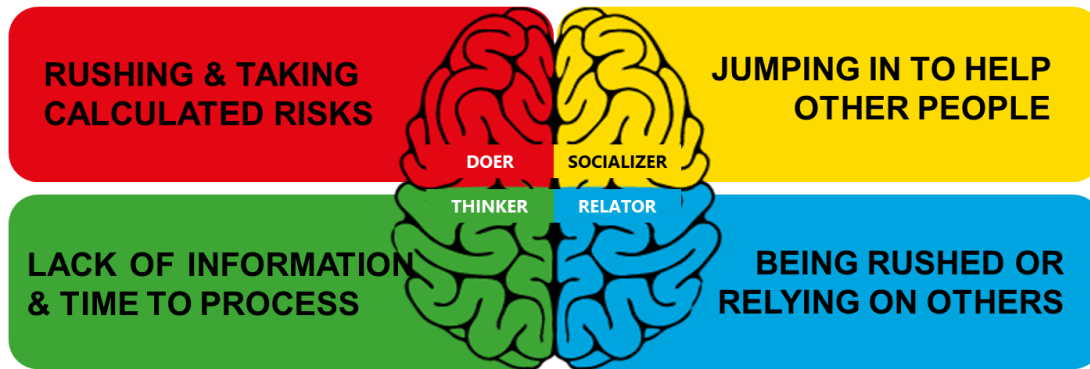
Figure 7: How Could I Get Hurt?

Personality Based Communication Tendencies

Different personalities need different questions answered first. Understanding this can lead to better overall communications and better high-risk task briefings and task preparations.
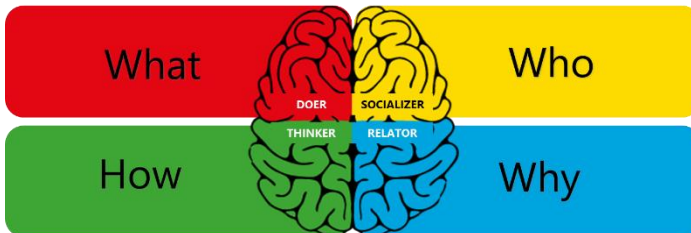
Figure 8: Typical First Question
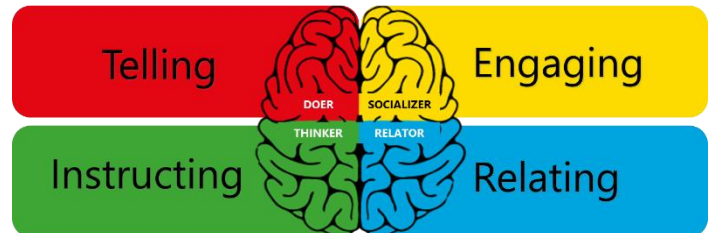
Figure 9: Communication Style

3. Application of usable models

Traditional models must take into account that different people with different personality tendencies see and manage risk differently. Application of this basic concept and the rest of science-based Human & Organizational Performance principles provide a new level of application and effectiveness to existing performance improvement models.

Figure 10: AERO Swiss Cheese Model

4. Science-based definitions

AERO integration requires the use of very specific definitions for things like errors, events, deviations, violations, causes, traps, triggers, and tools. Leaders who commit to using these science-based definitions see faster and more effective integration of the concepts into the day-to-day work. In addition, understanding our tendencies (and those of others) and the definitions helps people in the organization more specifically comply with the definitions, providing almost immediate consistency and move towards sustainability.
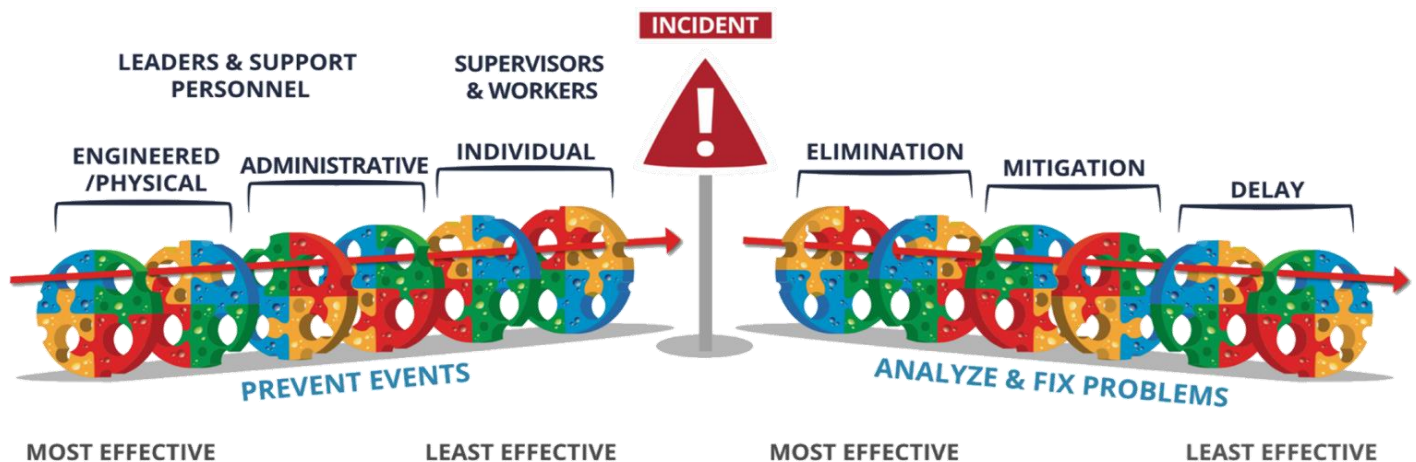
AERO Definitions	
Error An action or inaction that **unintentionally** Results in an undesirable or unwanted condition OR Leads a task or system out of limits OR **Deviates** from a rule, standard, or expectation	We **MUST** learn to separate the **ERRORS** from the **EVENT**
Event (or incident) The undesirable result of an error, a set of errors or a set of conditions	
Deviation Not strictly complying with a rule, standard or expectation	**ERRORS** and **VIOLATIONS** are **DIFFERENT THINGS**
Violation An action or inaction that intentionally deviates from a rule, standard, or expectation	
Active Error An action or inaction that results in immediate consequence	We **MUST** pay **ATTENTION** to **ALL TYPES** of **ERRORS**
Latent Error An action or inaction that results in consequences that are delayed or create latent conditions	

Figure 11: AERO Definitions

Some basic understandings

- 90% of events are caused by something OTHER THAN JUST the individual*
- 95% of people react very similarly (physiologically) to the same stimuli
- People do what they do, at the time that they do it, for reasons that make sense to them at the time**
- AERO is NOT common sense

How bad things happen

Figure 12: How Bad Things Happen

~15% — **Outside organizational control** (natural phenomenon, isolated equipment failure)

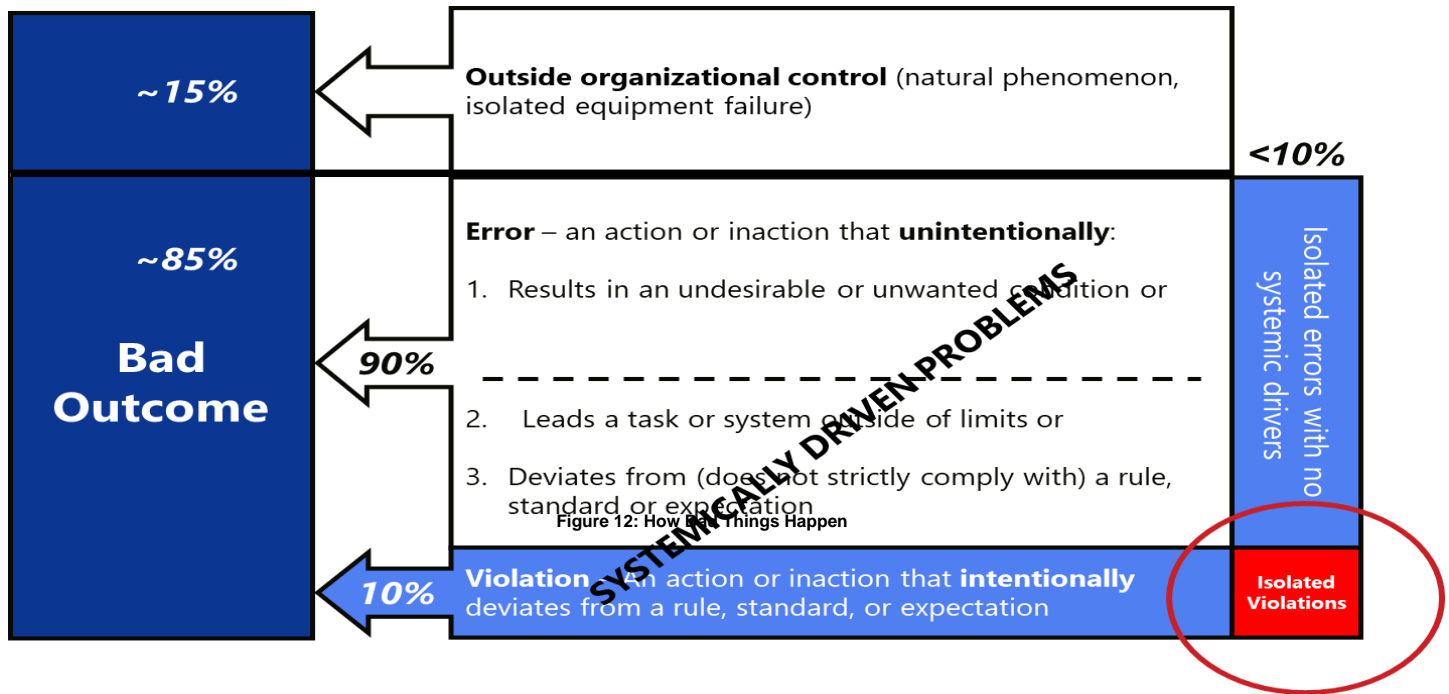**~85%** / **Bad Outcome**

90% — **Error** – an action or inaction that **unintentionally**:
1. Results in an undesirable or unwanted condition or
2. Leads a task or system outside of limits or
3. Deviates from (does not strictly comply with) a rule, standard or expectation

10% — **Violation** – an action or inaction that **intentionally** deviates from a rule, standard, or expectation

<10% — Isolated errors with no systemic drivers

Isolated Violations

SYSTEMICALLY DRIVEN PROBLEMS

5. Performance Modes

There are three mental models called performance modes that people move in and out of all day. They were determined by research in the 1960s. They are based on *THIS PERSON on THIS TASK at THIS TIME.* It does not matter how many times an organization has done a task, only how many times the person doing it THIS time has done it impacts their mental model. AERO is about improving performance at the TASK and STEP levels.

Skill-Based – things we do out of habit, not thinking, using low or no conscious thought. The tasks contain less than seven discreet steps and must be done >50 times successfully over a short period to allow someone to perform in this mode. There is a relatively low *error rate of 1:1000* in this mode, approximately 3x better than the standard human failure rate.

Rule-Based – there is a rule, and you know there is a rule (an agreement that an expectation exists). People cannot know all rules, so they have to know a rule exists to find it. SOPs, JSAs, WIs are all examples of rules. However, not all rules are written. The *error rate for this mode is 1:100* when things are done from memory, and there are <7 steps. Tasks >7 steps long and done from memory, increase the error rate exponentially. Tasks that use a correct and well-written rule reduces the error rate by a factor of 10 or more.

Knowledge-Based – you don't know what you don't know. There are gaps in your information, and your mind knows that the gap exists, but does NOT know the answer. This is exhibited by people scratching their heads, saying phrases like "I think," "I believe," "I am almost sure." Whenever these "triggers" exist, the *error rate is 1:2-1:10 (50%-10%)*.

Performance Mode	Characteristics	Error Rate
Skill Based	Habitual tasks that need low to no conscious thought and you don't have to think... (>50 times and <7 steps)	**HABITS** 1:1000
Rule Based	There is a rule and the person knows the rule exists but does not have to KNOW the rule (we cannot know all the rules)...	**PROCESS** 1:100
Lack of... **Knowledge Based**	The person does not know what they don't know – they THINK they know but have some doubt... **You cannot THINK your way out!**	**GAPS** 1:2 - 1:10

Figure 13: Performance Modes Table

Both the Equilibria data and traditional human performance studies have shown that people must *manage their tendencies* to ensure they identify their (and those around them) shifting performance modes, especially when moving to knowledge-based mode. This enables them to use the right tool the right way to reduce the error rate effectively.

6. Error Traps & Triggers

Error Traps – Task-related predicaments (characteristics of a specific) task or individual that increases the probability for error during a specific action.

Triggers- are observable actions or reactions, a recognized thought or individual perception, or a "gut-feeling" that something isn't right**.** They are clues or cues (using the five physical senses and intuition) that tell us a trap exists.

AERO development has revealed that, based on our tendencies, we set different traps in different ways for different personality styles. In return, those different personality styles set traps differently for us. When individuals are aware of and managing their personality tendencies, the ability to see the triggers and deal with the traps significantly increases over the traditional generalized science of human performance.

- Stress
- Multi-tasking/High work load
- Time pressure

- Poor communications
- Vague/poor written guidance
- Overconfidence
- Infrequent or first time task

- Distractions
- First working day following time off > 4 days
- The end of work shift or extended hours

Figure 14: Top 10 Error Traps

7. Tools to minimize error and event probability

AERO offers a variety of choices of tools for the person on the task to pull from to reduce their probability for error. Adding the tool of Personal Intervention significantly increases the likelihood that this person, on this task, at this time will use the right tool the right way to reduce the probability of an error that could result in an event. Each time the right tool is used the right way, the error rate on that task is reduced by at least a factor of 10.

Tendencies & Personal Intervention

Verbalize, Point & Touch

Step-by-Step

Stop & Seek-out Help } **Individual**

3-Part Communication

Pre-Procedure Brief } **Group**

Show & Tell

Values & Method based observations } **Leader**

Figure 15: AERO Tools

Intentional Leadership and the Essential Leadership Cycle

As leaders in an organization proceed through the critical elements of deployment (Education, Integration & Sustainability), they can use the Essential Leadership Cycle to improve the probability that the deployment achieves the desired outcomes. By focusing on the driving elements and understanding the resultant conditions, the organization can stay focused on the essential attributes of improvement.
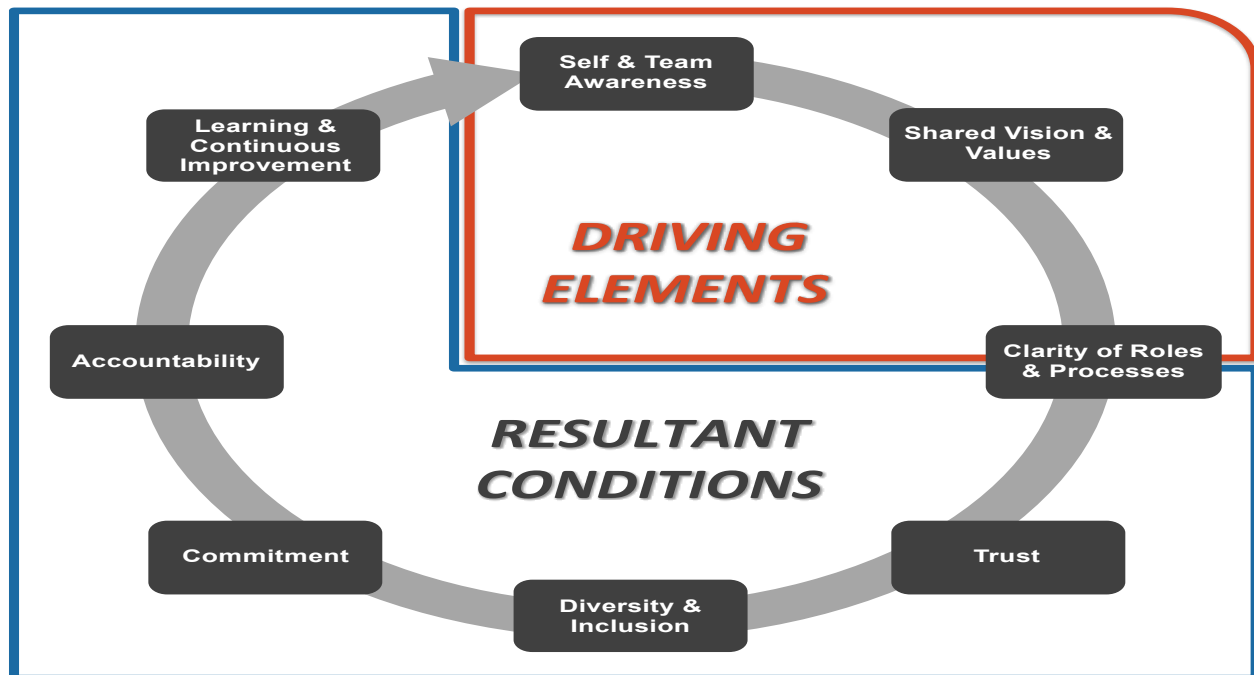

Figure 16: Essential Leadership Cycle – Driving Elements & Resultant Conditions

The integration of and use of AERO significantly improves the probability that traditional human performance elements will be used the right way to reduce errors and events, especially on tasks that contain fatality or serious injury potential or relate to process safety.

Self & Team Awareness – Team members are aware of and managing their personality tendencies.

Leaders have a clear understanding of human error science, principles, and concepts and use them every day.

- Understanding **communication styles**
- Understand others' **tendencies**
- Managing teams effectively starts with **self and team awareness**

THE WHAT – Intentional Leadership behaviors that support Self, Team and Others awareness:

- Actively seek ways to increase self-awareness and always keep working on identified gaps
- Understand and practice the concept of emotional intelligence as a mechanism to increase your self and social awareness
- Demonstrate internalization of E-Colors concepts by regulating your tendencies, understanding other's perspectives, and tailoring your approach to others
- Actively manage your communication style and ensure that your critical communications answer the Who, What, When, Where, and Why
- Use Personal Intervention (PAUSE when you need to slow down & PLAY when you need to say something or move forward) openly and visibly
- Demonstrate intentional leadership behaviors by utilizing the tools and applications provided

THE HOW – Intentional Leadership actions that support Self, Team and Others awareness:

- Use the Intentional Leadership assessment
- Use the Social Intelligence Self Assessment
- Taking the results of the above assessments gauge where the leader is doing well and what aspects of their leadership style needs the most focus
- Each leader and team to participate in a Team Start-Up highlighting the strengths that each individual brings to the team
- Each leader and team to participate in a Team Tune-Up exercise highlighting how each team member can disrupt teamwork and how to minimize or eliminate that behavior
- Utilize the Planned Engagement Checklist when appropriate and when possible, share with the team
- Each leader to take on an Upward Mentor
- Each leader to take on an Accountability / Learning partner
- Utilize the E-Colors and Personal Intervention pocketbook for reference and effective communication

Shared Vision and Values – The leaders and the organization have a clearly defined and commonly understood **vision, mission, values, and strategy.** Leaders ensure the smaller organization values **remain aligned** with the larger organization values.

TEAM COMPASS

MISSION

What is our objective and what do we want to achieve?

VISION

Who are we as a team and where do we see ourselves going?

STRATEGY

How will we plan to successfully implement our Mission, Vision & Values?

VALUES

Why do we do what we do and in what manner?

THE WHAT - Leadership behaviors that support Shared Vision and Values:
- Demonstrate a clear understanding of what the company and your department's team vision, mission, values, and strategies are and align with them
- Regularly create opportunities for team members to align on and discuss vision, mission, values, and strategies
- Visibly and verbally support the Enterprise and organization's vision
- Operate in alignment with the organization's vision, mission, and values
- Observe and act when you perceive the team drifts away from the established vision, mission, strategy, and values

THE HOW - Leadership actions that support Shared Vision and Values:
- Visibly and verbally support the Enterprise's Vision, each leader to discuss with their team how to support the vision best and, if necessary, run a 'Big Elephant' exercise to ensure all perceived barriers are surfaced
- Relentlessly talk about the vision with peers, reports, stakeholders, and other functions
- Ensure that the employees (Organization and business partners) have a voice and are heard regarding their perspective
- Discuss the Enterprise's vision and values and how each team member relates to them
- Run exercises where each the values are discussed from each team member's point of view and how that value relates to them
- Encourage the team to reach out to other functions, business units, and strategic business partners and gain an understanding of their vision and values, along with their business drivers and strategies
- When new team members join the organization, ensure that a discussion takes place specifically around the function's vision and values - never assume that the transfer of knowledge and understanding will take place organically

Clarity of Roles and Processes

If leaders follow processes, *supervisors and workers* will follow processes. Designing *Roles, Responsibilities, Accountabilities, and Authorities and u*nderstanding *systemic interactions*. Intentional Leaders understand the difference between *work as imagined* and *work as done.*

ROLES & PROCESSES AND THE E-COLORS

WHAT
"What is the role?"

WHO
"Who is responsible?"

HOW
"How does the process work?"

WHY
"Why have we come together as a team?"

THE WHAT - Leadership behaviors that support Clarity of Roles and Responsibilities:
- Have clearly defined roles, responsibilities, accountabilities, and authorities
- Routinely stop and seek outside help or counsel in the absence of necessary information, rules, or formal procedures
- The people you supervise or work with fully understand your core expectations of them, and you have periodical meetings to ensure this is the case
- You fully understand the core expectations that people you supervise or work with have of you, and you have periodical meetings to ensure this is the case
- Don't assume people know what's expected of them - use the Mutual Expectations worksheet
- Provide clarity through open and honest feedback, use the tools provided to do this

THE HOW - Leadership actions that support Clarity of Roles and Responsibilities:
- Leaders have a vital role regarding this Essential, mainly by ensuring that each team member knows their key job responsibilities and that of their peers and counterparts
- Following the R2A2 format helps each individual understand their role, responsibility, Accountability, and level of authority
- Each leader, first preparing for the conversation utilizing the Planned Engagement Checklist, should hold a Mutual Expectations discussion with the people they lead
- It is important to follow the prescribed protocol so that the person who reports to the leader is given ample time to think through and process what expectations they have of their supervisor.
- The leader should ask, 'What can I do for you that enables you to be successful?' Most people have never been asked this, which reinforces the need for time to process the question and be able to articulate the answers, using the document provided in the Intentional Leadership coaching package
- Leaders need to be aware that people cannot live up to expectations that they don't know have been set for them, so it is up to the leader to provide absolute clarity to each team member, ensuring confirmation of understanding by asking open-ended questions
- It is worth appreciating that, as previously stated, Self, Team and Others Awareness, Shared Vision and Values, and Clarity of Roles and Processes are THE DRIVING ELEMENTS. As such, the remaining Essentials are the RESULTANT CONDITIONS. In other words, the more effort that has gone into these three, the better the outcome of the following five elements of the Essential Leadership Cycle

Developing TRUST using the ELC
- Individual personalities *perceive Trust, develop Trust and lose Trust differently*
- *Use models* to gain and retain Trust
    - Deviation Potential
    - Deviation Drift
    - Deviation Analysis
    - Just Culture
    - Task-Based System
    - Essential Leadership Cycle

TYPES OF TRUST

COMPETENCY TRUST

"I trust that you have the required skills to do your job, that you will do what you say you will do and that you will follow procedure."

RELATIONAL TRUST

"I trust you enough to speak my mind and voice my opinions without fear of recrimination. I trust that you have my back and that your motives are pure and aligned with the collective goals of the team rather than your own agenda."

THE TRUST TRIANGLE

Competency

Capacity/Reliability

TRUST IS DOMAIN SPECIFIC

Honesty & Integrity
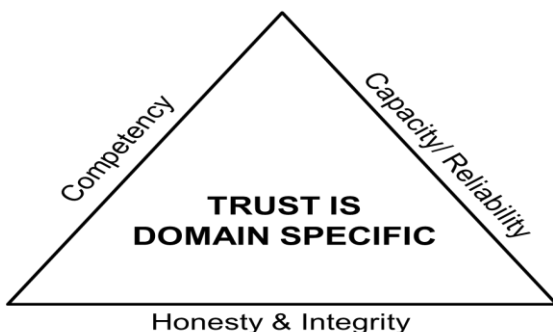
THE WHAT - Leadership behaviors that support Trust:
- Acknowledge that Trust is an area that for one reason or another has eroded within the function and needs to be addressed
- You are comfortable sharing your vulnerabilities, and you openly admit when you are wrong or when you need help
- You have created/contributed to an environment where team members feel valued and free to voice ideas and concerns without fear of recrimination
- You regularly give the people you supervise, and your peers appropriate recognition
- You actively address and remediate situations where your reactive tendencies have gotten the best of you
- You make an effort to appreciate that different personalities view Trust through their E-Colors lens

THE HOW - Leadership actions that support Trust:
- Leaders must gain Trust through actions and behaviors and not position
- Each leader should discuss the Trust Triangle with their team members and strive to understand what is the current status
- Leaders need to show an appreciation of the dynamic where some people see Trust as a competency-based bias whereas others see Trust in the light of relational based Trust
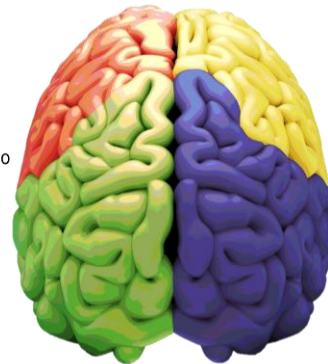- Competency-based trust "I trust that you have the required skills to do your job, that you will do what you say you will do and that you will follow procedure."
- Relational-based trust "I trust you enough to speak my mind and voice my opinions without fear of recrimination. I trust that you have my back and that your motives are pure and aligned with the collective goals of the team rather than your own agenda."
- Each leader, first preparing for the conversation utilizing the Planned Engagement Checklist, should hold a Mutual Expectations discussion with the people they lead and establish where they each are in terms of mutual Trust
- Gauge each employee's belief system in their leaders and the function by holding open conversations around such aspects as CDP's and how the PDC operates, and how they are represented
- Where possible, leaders should make intentional leadership based field/site visits each time taking one or two reports or a report and upward mentor so they can role model leadership behaviors with the workforce and supervisors

Diversity and Inclusion -
Leaders *actively encourage* participation and collaboration and understand that diversity *extends beyond physical attributes* and into thought and personality tendencies. *Diversity is a condition* (a fact), and *inclusion is a decision* (an action). Intentional Leaders embrace the diversity of thought in *critical decisions*

THE WHAT - Leadership behaviors that support Diversity and Inclusion:
- You demonstrate through your conversations and actions that you are increasing your awareness about diversity and inclusion
- You understand the value that diversity brings to the organization and the team
- You actively include others so that anyone can provide input to a critical decision and/or condition
- You press 'PAUSE' on thoughts such as: "If I could have done this on my own, we would have already finished."
- You understand the concepts and relevance of Unconscious Bias and Micro-Inequities and the impact these can have on the team's attitude and output
- You press 'PLAY' on including all the appropriate people when Tenet 10 is being invoked
- You role model respect and the appreciation of the diversity of thought

THE HOW - Leadership actions that support Diversity and Inclusion:

- Being an intentional leader in diversity and inclusion is necessary for all. It should be recognized as an ongoing journey, very much like the 'infinite game.'
- Leaders are well-advised to start by listening to their own words and carefully watching how they are perceived by whomever they are engaging with.
- There is much to learn in this Essential, and an upward mentor can be an excellent resource for each leader to learn from another perspective
- Leaders should be fluent in their organization's definition of diversity and inclusion and should always be ready and willing to learn their team's views on the various elements of D&I
- Leaders should be familiar with their unconscious and conscious biases and address them using PAUSE and PLAY, where appropriate
- Understanding micro-inequities, micro-affirmations, and the impact both can have is fundamental for leaders to appreciate
- Leaders should communicate closely with their team to know what it takes for each team member to feel valued and that they belong
- Encourage team members to openly discuss their thoughts, particularly around how they like to be included, keeping in mind that certain E-Colors pride themselves on being highly independent and prefer to work alone
- Leaders should familiarize themselves with the Inclusion Matrix card, which is in the Intentional Leadership coaching package

Commitment - As a Leader, you must be committed and show that Commitment before you ask others to commit. Understand that individual Commitment is a personal choice. Intentional leaders are present, available, on time, and accessible to all levels of the organization.

THE WHAT - Leadership behaviors that support Commitment:

- As a leader, you set the stage for team members to agree first and commit later
- You are acutely aware of how different personality styles perceive Commitment
- You don't react negatively when team members voice their concerns / critical thoughts / constructive feedback
- You understand that 100% consensus is rarely achievable and that it is okay to disagree yet commit
- Once you commit to something that you disagree with, you act accordingly and don't gossip / bombard the idea / expect it to fail
- Utilize the Discretionary Effort graph, encouraging team members to describe their position on it and explain why honestly

THE HOW - Leadership actions that support Commitment:

- An intentional leader won't ask for Commitment but will set the stage for each individual to decide for themselves when they are prepared to commit
- Asking the question first, 'What will you agree to do' instead of 'Will you commit?' is an excellent first step when engaging with someone who doesn't know the leader well and finds themselves in an engagement that feels awkward. It is up to the leader to set the stage for a successful outcome
- Keep in mind that Commitment is one of the RESULTANT CONDITIONS and as such will need to be pre-empted by the appropriate work and efforts in the DRIVING ELEMENTS, as well as Trust and, Diversity and Inclusion
- Use the Discretionary Effort Model so that people can openly share where they are on the scale and why they are there

- Leaders should learn how to influence Commitment through an E-Colors perspective and practice an adaptive leadership style that it will take to bring people along with them
- As with previous Essentials, each leader, first preparing for the conversation utilizing the Planned Engagement Checklist, should hold a Mutual Expectations discussion with the people they lead and establish where they each are in terms of Commitment and what it will take to have each team member bring their best self to work and take their best self home

ACCOUNTABILITY & THE E-COLORS

Accountability
Understanding the difference between Accountability and discipline. Understanding behavior and 'just culture' models and using models for determining organizational, systemic, and individual Accountability.

VERBALLY
(EXTERNALIZES)

RESULTS

BEHAVIORS

MATTER OF FACTLY
(INSENSITIVE)

DIPLOMATICALLY
(SENSITIVE)

PROCEDURES

VALUES

MENTALLY
(INTERNALIZES)
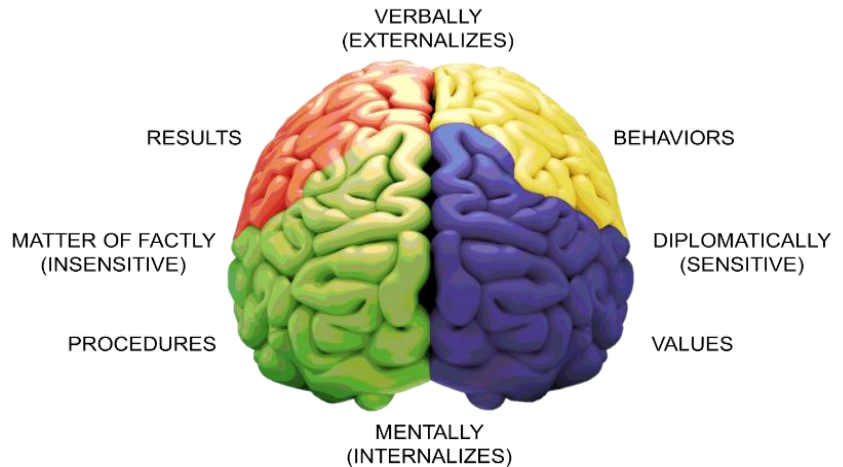
ON HIGH PERFORMANCE TEAMS

Team members are responsible for their own actions and behaviors.

They say what they do and they do what they say.

If they see it or say it, they own it.

Accountability starts with the leader who holds the team responsible not only for results but also for the actions & behaviors that lead to those results.

In turn, team members are empowered to hold one another accountable (Peer to Peer Accountability)

RESPONSIBILITY | ACCOUNTABILITY

AUTHORITY | DELEGATION

Authority is bestowed but should never be assumed.

Authority should be respected but never feared.

People in authority should have high levels of self and team awareness, strong shared vision & values, be trusted, respected and committed.

Team members understand and respect the relationship between responsibility, accountability, authority and delegation.

They know each others Strengths & Potential Limiters and understand how to delegate to people using the E-Colors as a tool for understanding & communication.

THE WHAT - Leadership behaviors that support Accountability:
- You understand the process that needs to be followed to get to a place where Accountability can be addressed (Essentials #1-6) and therefore don't hold people accountable too soon
- You take personal Accountability for your attitudes, actions, and behaviors. If you do something that is misaligned with your commitments, you own it
- You are comfortable holding others accountable for their attitudes, actions, and behaviors
- You understand that human beings are fallible, and even the best will make mistakes
- You don't jump to conclusions when a bad outcome takes place, and you analyze what has happened to determine causation
- Celebrate individuals and team members when Accountability and responsibility are demonstrated

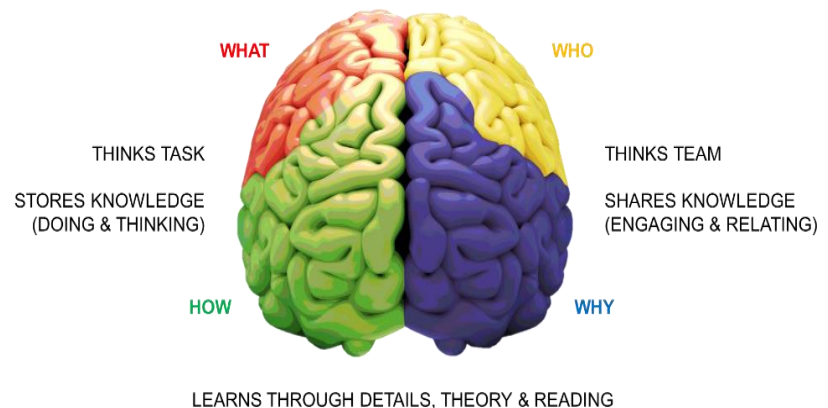**THE HOW - Leadership actions that support Accountability:**
- Leaders who have executed the necessary amount of work and expended the energy on making sure that each of the Essentials up to this point can be more comfortable addressing Accountability at all levels within their sphere of influence
- The definitions describe Accountability, Responsibility, Authority, and Delegation so that there is a clear understanding of where the lines are drawn between one and the other
- Leaders need to understand that like many aspects of the Essential Leadership Cycle, personality perspectives and biases play a significant role in how people perceive Accountability
- As with previous Essentials, each leader, first preparing for the conversation utilizing the Planned Engagement Checklist, should hold a Mutual Expectations discussion with the people they lead and establish where they each are in terms of Accountability and their understanding of what's being asked of them
- Leaders should make every effort to let their team see that Accountability is NOT a blaming tool. When appropriate, it goes a long way to recognize individuals or teams that have taken full responsibility and held each other accountable at a peer to peer level for a positive outcome
- Highly recommend introducing a systemic approach to where each leader actively seeks out an Accountability and Thinking partner who provides the extra 'push and support' that we all need from time to time

Learning and Continuous Improvement

Learning lessons before failure. Capturing and prioritizing lessons learned and improvement opportunities, managing change, and modifying the system to learn lessons sustainably. Communicating lessons learned effectively.

LEARNING & CONTINUOUS IMPROVEMENT

LEARNS THROUGH BIG PICTURE, DIAGRAMS & DISCUSSIONS

WHAT   WHO

THINKS TASK   THINKS TEAM

STORES KNOWLEDGE   SHARES KNOWLEDGE
(DOING & THINKING)   (ENGAGING & RELATING)

HOW   WHY

LEARNS THROUGH DETAILS, THEORY & READING

THE WHAT - Leadership behaviors that support Learning and Continuous Improvement :
- Leaders set objectives, followed by seeking confirmation of understanding that team members are clear on the desired result
- Leaders demonstrate that they understand the value of debriefing and actively champion the process
- Set the tone by making it 'Okay' to say 'No' when an objective was not achieved
- Encourage people to provide feedback and never respond negatively to unexpected or undesired comments
- Actively engage in learning and further personal development (reading books, specialized courses, videos, TED talks, etc.)

THE HOW - Leadership actions that support Learning and Continuous Improvement :
- Leaders must encourage learning at all levels and also push for continuous improvement
- It is important to realize that leaders are continually providing experiences for their team members, peers, supervisors, other functions, BU's, partners, etc. and should be aware that it is up to them to encourage REFLECTIVE EXPERIENCES which can lead to behavior and cultural change
- As leaders, there are numerous opportunities to work with team members, so they get the chance to influence the organization by providing reflective experiences for others proactively. the leader sets the tone
- Leaders should become eloquent in setting succinct objectives for their team, meetings, town halls, site engagement site visits, etc. and they should ALWAYS end each of these with a structured debrief
- Debriefing sets the tone for continuous improvement and opens the door for enhanced teaming as each member becomes more effective in their communication style and objective setting

THE PLANNED ENGAGEMENT CHECKLIST

Use your knowledge of the E-Colors and Personal Intervention to **RESPOND** rather than react during the engagement and give your audience the right experience.

1	**R**esult	Define objectives and envision what success looks like for you and your audience. Think "win-win".
2	**E**-Colors	Be aware of your Strengths & Potential Limiters. Use Personal Intervention and embrace diversity of thought.
3	**S**etting	Choose a location and situation that best suits your meeting. Allocate sufficient time.
4	**P**repare	Do your research and study any pre-reads. Don't assume. Anticipate a variety of situations.
5	**O**ptions	What communication tools do you have at your disposal to help you with this engagement?
6	**N**arrative	Plan what you will say, how you will say it and to whom and when. Be intentional with your communication.
7	**D**ebrief	Allocate time to debrief. Ask for feedback. Reflect on the experience, capture lessons learned and action items.

INTENTIONAL COMMUNICATION GUIDE

TELLING   **LESS DETAILS**   **ENGAGING**

WHAT — **INDEPENDENT - TASK ORIENTED**

If you recognize the following communication style (verbal and visual):
- Displays impatience
- Likes to keep their distance
- Tends to be blunt and to the point

Consider these:
- Be clear, specific and brief
- Present the information logically
- Provide alternatives and choices for making decisions

WHO — **PEOPLE ORIENTED**

If you recognize the following communication style (verbal and visual):
- Displays openness and willingness to engage
- Tends to talk more than listens
- Speaks about a variety of subjects in a friendly manner

Consider these:
- Be sociable, relatable and friendly
- Do not deal with a lot of details
- Ask for their opinions and ideas

HOW

If you recognize the following communication style (verbal and visual):
- Comes across as being autonomous or independent
- Asks for pointed information
- Looks for facts and data, not stories

Consider these:
- Approach them in a straightforward way
- Provide solid, tangible and practical information
- Give lots of details

INTERDEPENDENT — **WHY**

If you recognize the following communication style (verbal and visual):
- Displays openness and a steady and measured pace
- Can be reluctant to speak up in large groups
- Has a calm and patient demeanor

Consider these:
- Start with a personal comment to break the ice
- Show sincere interest in them as a person
- Listen to understand and be responsive

EXPLAINING   **MORE DETAILS**   **RELATING**