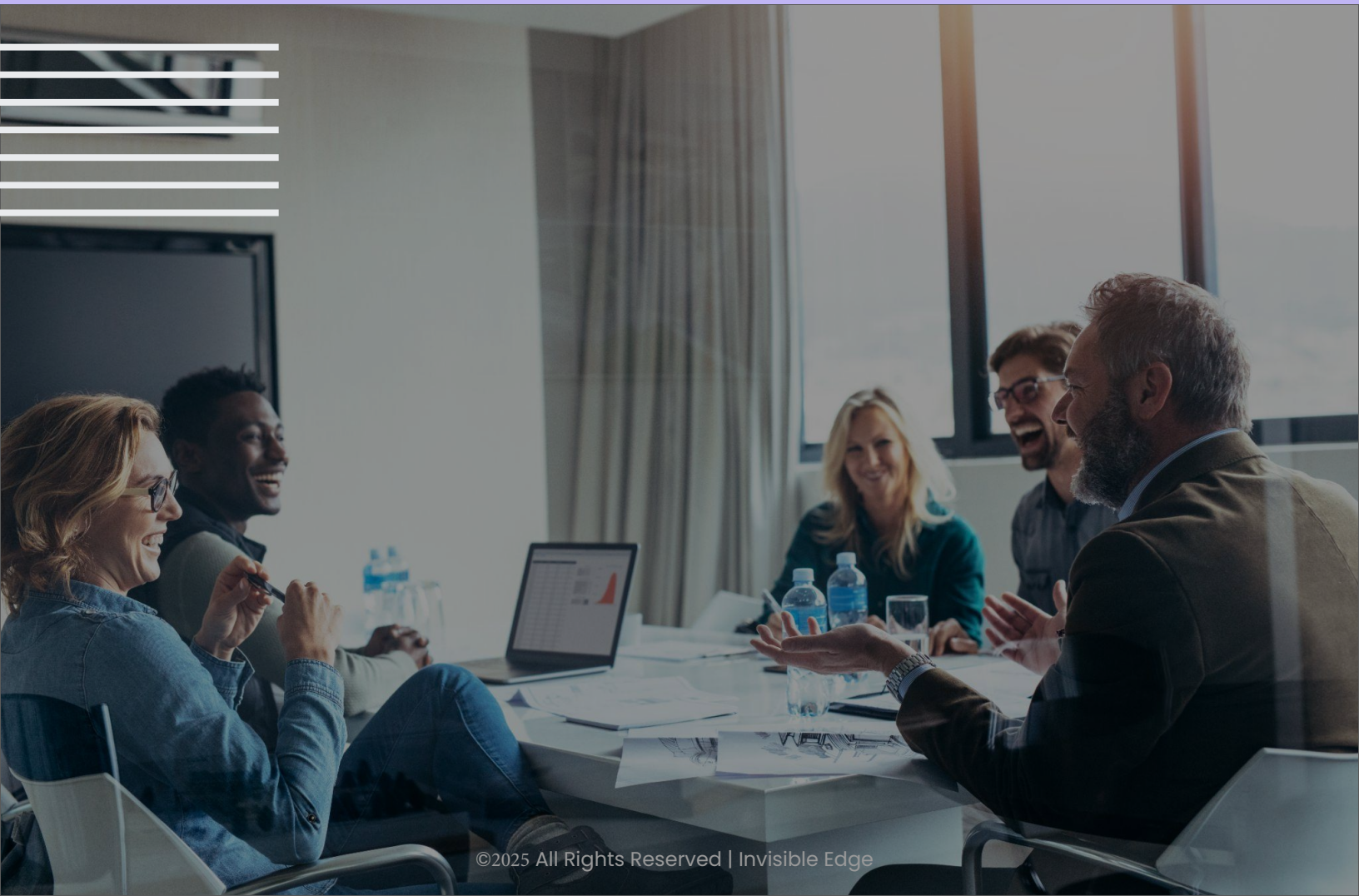
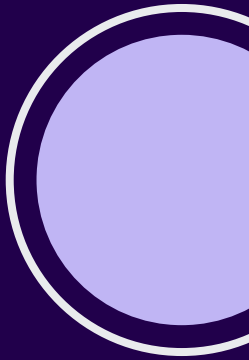




Leading People to Greater Impact

Modern Manager's Toolkit



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Welcome to

Modern Manager's Toolkit

A transformative training program designed to empower managers with the skills and confidence needed to lead effectively, cultivate high-performing teams, and drive organizational success.

Modern Manager's Toolkit addresses common obstacles managers face, including

- Limited time for self-development
- Challenges in delegation and trust-building
- Confidence in setting boundaries and saying no
- Avoidance of difficult conversations.

The program empowers managers to overcome these challenges and thrive in their roles by providing practical solutions and actionable strategies.

The Format

This comprehensive eight-week curriculum is delivered through live, interactive group sessions, each focusing on a specific skill to learn.

Before Each Group Training Call

In this accompanying workbook, you will find guides and worksheets for each session. Reading the corresponding guide and completing the worksheet before your next live training session will help you get more out of the program. This way, you can use the group training calls to apply what you have already learned and gain a deeper learning experience and integration.

The Skills Learned

Participants will acquire a range of valuable skills to be an effective leader. Armed with these skills, managers will be better equipped to confidently lead with confidence, inspire their teams, and drive sustainable organizational growth. Skills you can expect to develop include:

- Improved time management
- Delegation proficiency
- Stress management
- Conflict resolution
- Feedback delivery
- Effective meeting facilitation
- Emotional intelligence enhancement.

This is not just a training program...

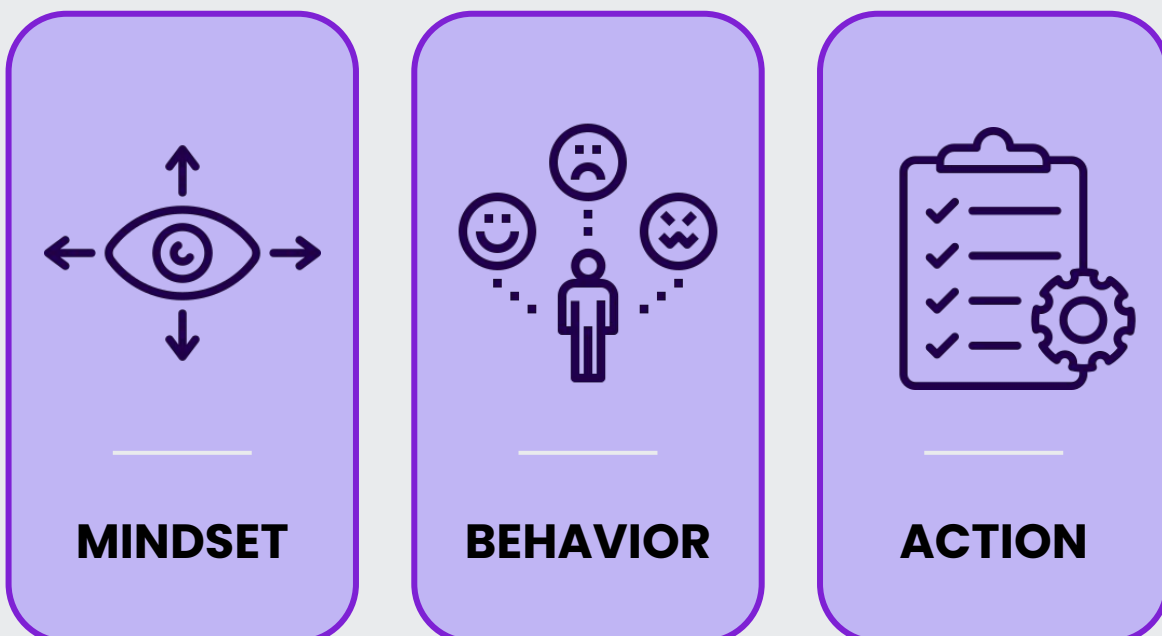
Some programs are designed for you to sit back and be a passive listener. **This is not that kind of program.** We've designed this program to catalyze professional growth, organizational excellence, and leadership mastery. You will be asked to reflect on your own experience, apply a growth mindset, and hold yourself to a high level of accountability. We look forward to partnering with you on this transformative journey and unlocking your full potential as a manager!

Through the Modern Manager's Toolkit: Leading People to Greater Impact, we've designed an immersive 8-week program for managers across all levels and departments. This transformative journey equips managers with the essential tools to bridge the gap between their technical skills and being a highly effective manager of people.

In this program you will earn your Invisible Edge MBA. You will gain new Mindsets, Behaviors, and Actions that amplify your influence and impact in your organization.

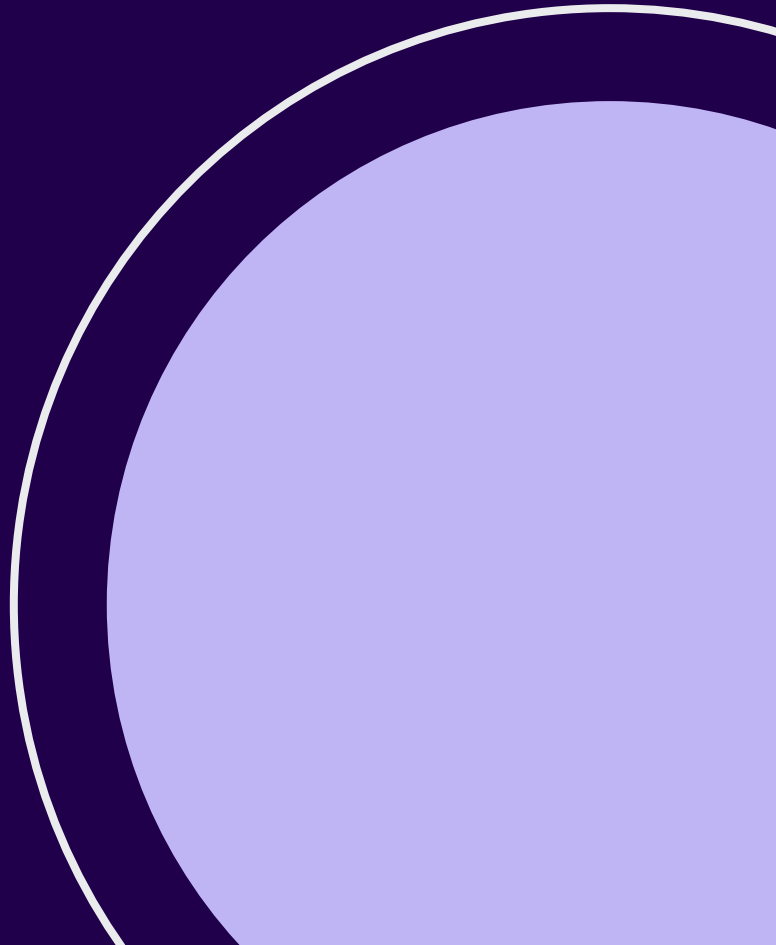
Invisible Edge MBA

Mindset: New Perspectives **B**ehavior: New Habits **A**ction: New Results



Module 1

Get Strategic Time Back



Understanding the Value of Time:

Recognize that time is your most precious resource. Unlike money or other resources, once it's spent, you can't get it back.

The reality is that most leaders work a level or two below where they should be to help fight the daily fires, fill-in the gaps on their teams, working extra hours to hit deadlines, and not trusting others to carry out key tasks and assignments.

This begs the question: *Are you investing your time wisely to drive the most value for your business?*

Transitioning from FireFighter to Fire Chief:

To bring greater value to your organization, you must shift your mindset and approach from being a FireFighter to a Fire Chief. This means allocating regular time for strategic work, focusing on high-value priorities that shape the future, rather than getting bogged down in day-to-day distractions.

This is described as shifting from working **IN** the business to working **ON** the business.

Identifying Invisible Barriers from Being the Fire Chief:

- 1.** Carving out Time: Many leaders struggle to allocate time for strategic work or even see the value in it.
- 2.** Protecting Strategic Time: Even if you block out time, maintaining focus can be challenging amidst daily demands and your environment.
- 3.** Defining Strategic Priorities: Once you have the time, clarity on top strategic priorities is essential. If you're not clear on these, you'll most likely fill-your time with lower-level activities and priorities.

Step 1: Stay Connected to Your True North:

List your top 3 strategic initiatives for the upcoming quarter. Ensure alignment with your manager to reinforce your commitment to your highest-value activities that align with the business’s top goals.

- 1.
- 2.
- 3.

Step 2: Identify Low-Level Distractions:

List tasks and activities that aren't the best use of your time and hinder your strategic focus.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Step 3: Stay Connected to Your True North:

Utilize the 4D strategy – Delegate, Ditch, Defer, Deal – to manage your low-level distractions effectively. Place your lower-level activities in the right buckets:

Delegate: This involves entrusting specific tasks or responsibilities to others within your team or organization. By assigning ownership, you empower, grow and develop individuals to execute on these tasks, freeing up your time to focus on higher-level priorities.

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Ditch: This refers to identifying and eliminating tasks, activities, or commitments that are unnecessary or no longer serve a purpose. By ditching these non-essential items, you reduce clutter and streamline your workload, allowing you to allocate time and resources more effectively.

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Defer: This involves postponing certain tasks, projects, or initiatives to a later date, typically the next quarter or year. By deferring non-urgent tasks, you can prioritize immediate priorities and focus on more pressing matters without sacrificing long-term goals.

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Deal: Dealing with tasks involves finding ways to handle them more efficiently and effectively. This may include optimizing processes, streamlining workflows, or implementing time-saving strategies to complete tasks in less time. For example, reducing the duration of meetings, adjusting meeting frequency, or setting earlier deadlines can improve efficiency and productivity.

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Step 4: Create Your Action Plan:

Outline specific actions, responsibilities, deadlines, and communication standards to reclaim your time.

1. Choose 1 or 2 strategies above to get 90 minutes back.
2. Consider who you need to inform, when and how you'll hand off any tasks, and specific ways you might improve efficiency.
3. Commit to an action plan.

Example: I'm going to delegate the Rosewood Project to Vince by June 15th. I'll inform my manager and review the project plans with Vince in the next 2 weeks.

Now write your plan:

Step 5: Schedule Strategic Time:

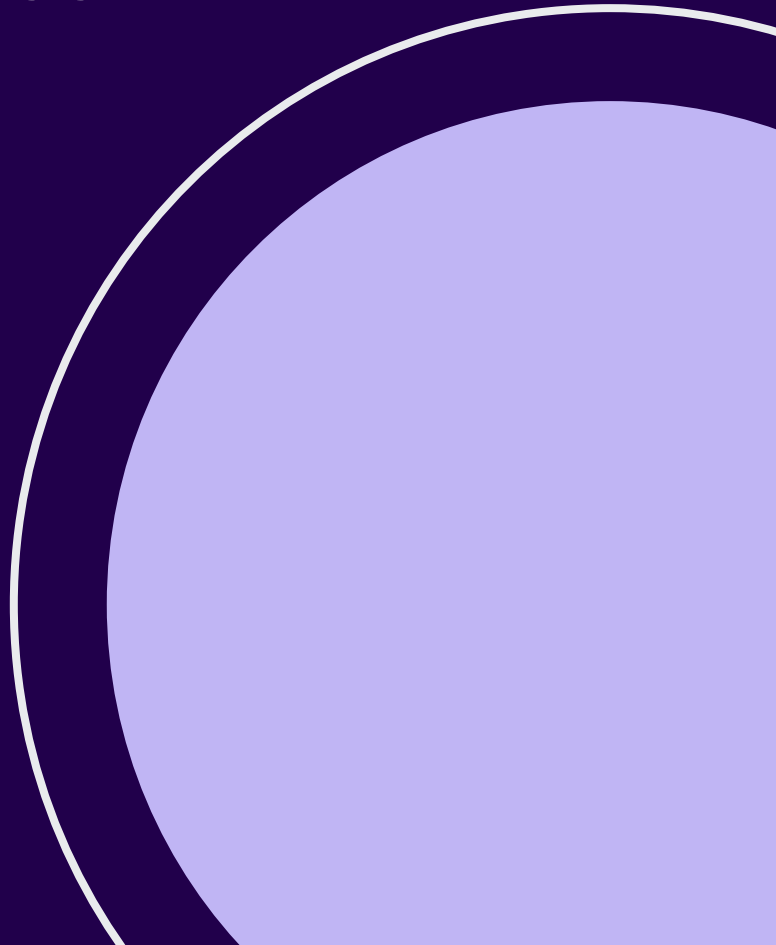
Block out dedicated time in your calendar for strategic work and ensure clarity on your top priorities.

By following these steps, you can transition from being consumed by daily tasks to strategically shaping the future of your business as a Fire Chief, not just a FireFighter.

Module 2

Thriving vs Surviving:

Resilience, Stress
Management, and
Leadership Presence



GUIDE

Thriving vs Surviving:

Resilience, Stress
Management, and
Leadership Presence



Thriving vs. Surviving

Often called the inner skills of leadership, people managers who have high levels of resilience and leadership presence demonstrate better leadership, communication, and decision-making behavior, resulting in greater influence and impact in the organization.

This guide equips a leader with the knowledge and tools to:

- Create a personal set of habits that build inner resilience
- Be the leader that motivates a team even during challenging times
- Bounce back from emotional setbacks more quickly

The Invisible Skills of Leadership Presence

Sustaining yourself and your team in the demanding, global environment requires even deeper self-awareness and emotional intelligence, comfort with the unknown, and an ability to bounce back from difficulties quickly to create thriving teams and organizations. Without resilience and leadership presence, leaders lose their competitive edge, face being overwhelmed and potentially burnt out, and reduce their efficiency and innovative thinking. This guide aims to help you understand more about the human brain, the neurobiology of stress, and how to enhance your resilience practices to increase your leadership presence and sustainability. You will also learn to manage effectively when others are reactive and affecting the work environment.

What is Leadership Presence?

Put simply, it's having the poise and confidence to constructively influence your team.

As a leader, your energy is contagious. Leaders are like cell towers that broadcast energy into the spaces they occupy. To dig into the research, neuroscience tells us that our mirror neurons can sense and feel someone's mood and energy anywhere from 3 to 15 feet beyond our physical body. That means that our presence is critically important to creating an empowering team energy where people can thrive.

It takes a conscious effort for a leader to develop an empowering leadership presence. It's a daily commitment to a mindfulness practice. If we hone the skills to practice being positive, calm under pressure, visionary, confident and curious, our bodies have a certain shape that those qualities will be observable.

Barriers to Leadership Presence

Lack of Confidence: Confidence is fundamental to leadership presence. Leaders who struggle with self-doubt or imposter syndrome may find it difficult to project authority and assurance in an authentic way.

Stress and Inability to Handle Pressure: Leaders who cannot manage stress effectively may appear frazzled or overwhelmed in challenging situations, which can diminish their authority and presence.

Low Emotional Intelligence: Emotional intelligence, including the ability to read social cues and adapt one's behavior accordingly, is crucial. Leaders who lack this skill may seem out of touch or insensitive to others' needs and emotions.

A Growth Mindset

A growth mindset is key to building resilience. We often program ourselves to think in a certain way and become 'fixed' in our perspectives and approaches. A growth mindset remains open to possibilities and asks questions, which forms a core tenet of innovation.

Consider this: When you face a challenge, do you see the challenge ahead of you as **IN** the way or **ON** the way? Seeing the challenge as **on the way** is a growth mindset. This mindset shift makes a huge difference in your ability to look for opportunities to grow and bounce back from setbacks. If you or your team sees something as 'in the way,' they will most likely look to blame other people, teams, or circumstances outside of their control, which is ultimately disempowering.

If you or your team begin to see challenges as something that is 'on the way,' you will build resilience, empowerment, and confidence to take risks and innovate. You and your team learn to accept "mistakes" and friction as part of growth. This one distinction alone can shift your company culture for the better.

The Power of Breath as an Invisible Tool

The breath is the key ingredient to self-regulation. When your nervous system gets out of sorts for any reason, the fastest way to recenter yourself and lower your blood pressure is to slow down your breathing. This ignites your parasympathetic response (rest and digest) and gets you out of your sympathetic state (fight, flight, or freeze).

Practice box breathing, or any breathing exercise that you find helpful. The worksheets below include a handout with several activities that help offload stress and regulate your nervous system.

Better Self-Regulation = More Resilience

Self-regulation is key to building resilience. It's your ability to slow down, stay open, and respond to the challenges around you from a calm and centered place. Otherwise, it's easy to get stuck in reactive, firefighting mode and become depleted and fried over time.

Learning how to regulate yourself and stay calm, cool, and collected allows you to engage in higher-level thinking and solutions. Your peripheral awareness opens up, and more possibilities are available to you. Another advantage is that you role model and help your team learn how to do the same for themselves. When their nervous systems go awry, they naturally look to the leader for a sense of assurance that things will be okay. When you level up, so does your team.

WORKSHEETS

Thriving vs Surviving:

Resilience, Stress
Management, and
Leadership Presence



The Centering Practice - Length, Width, Depth

**Credit to The Strozzi Institute and Wendy Palmer for their original work*

Practice the following five steps to help center yourself and bring more leadership presence to any situation you face.

The goal of this exercise is to become Centered. Centered is the state of being mentally and emotionally confident, curious, focused, and well-balanced.

Step 1: Engage the Breath

Bring your attention down to your abdomen, **your center**. Place your hand about two inches below your navel to locate your center. This is the center of gravity for your body. Go ahead and bring your breath all the way down into your center. Repeat for a few cycles.

We will use three dimensions to locate yourself more fully: length, width, and depth.

Step 2: Lengthen Your Presence

Starting from your center, feel your **length**. Let yourself extend from your center down to the ground and now from your center up to the sky. Feel your whole length. Allow your spine to lengthen. Feel your spine. Feel the length of your legs. Feel through your feet to the ground, and imagine you can extend down into the earth. Imagine your energy extending out through the crown of your head, extending up to the sky. Breathe into your length fully.

Step 3: Widen Your Presence

Experience your **width** from side to side. Feel your sensations and fill out from hip to hip, shoulder to shoulder. Feel the outsides of both arms. Fill in and take up the space of You. Breathe into and experience your full width.

Breathing in through the heart, think of someone you love, and then extend that warmth out into the room in all directions outward.

Step 4: Deepen Your Presence

Now, experience your inner depth — feel yourself from back to front. Find your low back, the space between your shoulder blades.

Notice your sensations. Now bring your attention to who or what you love or care about. Listen to the answers from your whole being, including your body. Breathe into your love for someone or something and let it live in your center.

Step 5: Take a Moment to Reflect

How do you want to lead from this place? How do challenges look from this space? What solutions are available to you that you didn't receive before?

Practice often during the day/evening – moving and sitting from this state of Center. Several times during the day, even as you are walking to meetings or preparing for a remote call, extend into your length, width, and depth. While seated in meetings, you can even do this in your chair to stay present and engaged.

When would this Centering Practice be most helpful? Identify 2-3 times where you can see yourself practicing this inner skill.

What physical sensation will help anchor you and remind you that you are Centered. This anchor will be like saying, "I'm in my L-W-D and Centered". Write it down below:

For example: *A slight bend in my knees, A open chest and deep breath, Pressing into my toe mounds*

Keep practicing this and see what shifts as you recenter yourself and come back to your resilience and leadership presence throughout the day.

This is one of the most powerful yet subtle practices. Practiced with time, you will more easily embody poise and confidence with grace under pressure. This is the essence of embodied leadership.

From Surviving to Thriving - Design Routines That Promote Resilience

In this exercise, you will move from reactive to proactive stress management by intentionally planning healthy stress management practices into your day. The goal is to identify proactive healthy habits that will help manage stress levels more efficiently. Remember that scheduling even a couple of minutes per day pays off in the long run.

Step 1: Identify Reactive Healthy Patterns

What are the unhealthy behaviors and activities you tend to resort to when feeling stressed? What are your signals that you are overwhelmed or depleted? Despite their intention to destress, these activities often fail to provide long-term relief. Consider the list below to prime your thinking, and write down as many of your unhealthy patterns as you can think of.

Social media scrolling, checking email compulsively, unhealthy snacking, not sleeping, becoming more irritable.

Step 2: Identify Reactive Healthy Patterns

Science has validated various ways people choose to regain their equilibrium, bounce back, and feel centered again. What are some healthier activities that you could direct yourself toward instead? Choose 2-3 activities that feel energizing.

Journal writing, time in nature, meditation, exercise, music, gardening, decluttering, chat with a friend, power nap, scream (yell in private to vent the frustration, write an anger letter and burn it, hit a punching bag, deep breathing with the help of an app, prayer

Step 3: Set up a Routine

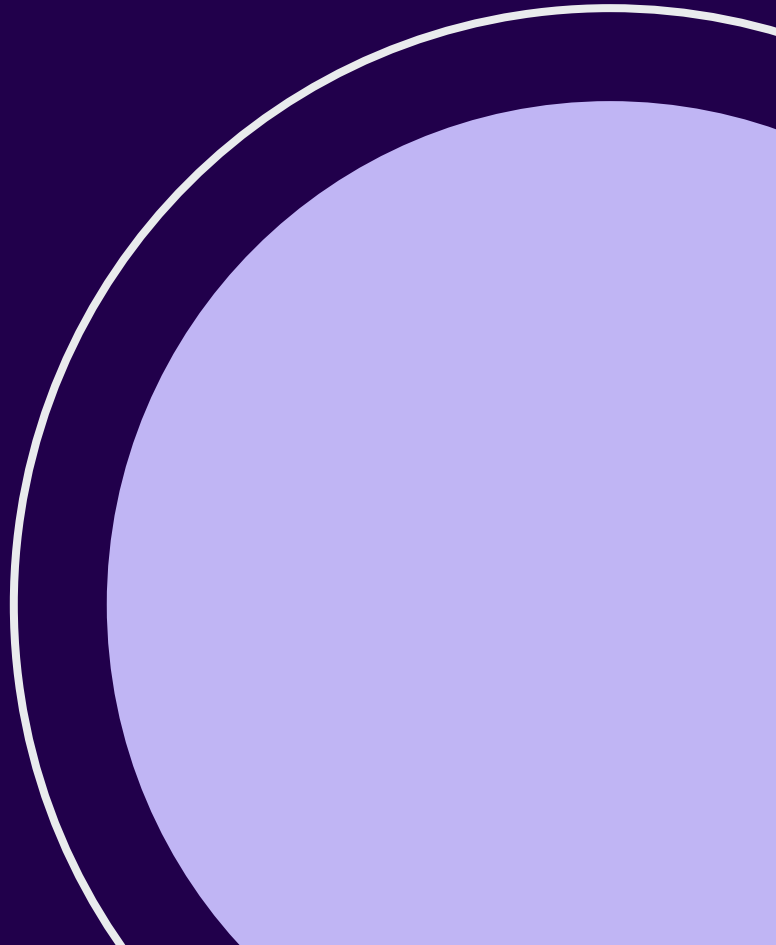
This is a key step in your stress management journey. It's about making these proactive healthy habits a regular part of your day, ensuring their effectiveness in managing stress. When is the best time of the day for you to integrate the proactive healthy habits you listed above? For instance, consider the following examples:

- Practice deep breathing with the help of an app at 2pm every day for 10 minutes.
- Schedule a lunch with a friend every Friday
- End meetings at 55 minutes after the hour to have 5 minutes to meditate and get centered between meetings
- Journal for 5 minutes to signal the end of the workday

Note: If you haven't yet, **schedule this in your calendar**

Module 3

Getting Aligned With Your Team



GUIDE

Getting Aligned With Your Team



Role Alignment Compass Guide

For a business to scale, there needs to be clear alignment between the role each leader plays in the organization and each direct report plays in a team. Alignment unlocks team growth. Clarity at an organizational level unlocks workflows, allowing the business to operate more efficiently and effectively.

This worksheet equips each leader with a highly actionable tool to define each role on the team with four essential questions. This eliminates role conflict, ambiguity, and stress, and guides the employee to truly take ownership of their role. Because this exercise invites the employee's perspective, it supports a high-trust culture where team members take on more responsibility.

Understanding the Value of Role Alignment

Role clarity is essential in organizations as it boosts productivity by defining specific responsibilities, leading to efficient task execution. It enhances employee well-being by providing a clear understanding of how each individual's work contributes to the organization's goals, leading to a deeper sense of purpose and intrinsic motivation. Role alignment also reduces conflicts, improves team dynamics, and streamlines communication.

In short, without role alignment, you're bound to experience chaos and conflict which leads to putting out fires all day. This begs the question: *Are you leveraging role alignment to increase operational efficiency and employee engagement?*

Transitioning from Misalignment to Alignment

Getting the alignment conversation to go wider than 'here are your top priorities' means both elevating it to a strategic context for the role as well as digging into subtle nuances of 'how' someone executes a role. In summation, it's a conversation to frame how they can grow to reach the next level of performance. It's not just about telling them what good looks like, it's about pulling that vision out of each employee and aligning it with where the company is heading. Read that again.

To bring greater alignment to your organization, shift your mindset from manager to coach. This involves establishing mentorship relationships that encourage immediate feedback, rather than waiting for the next scheduled performance review.

Successful leaders know that being a partner to your direct report's success and growth takes time and intention, and much can get in the way of that. Yet, putting in the work to build a mentor-level management style and avoiding the firefighting trap improves team performance and organizational efficiency tenfold.

Barriers to Alignment

1. **A Lack of Psychological Safety:** Psychological safety in the workplace is vital to a culture where employees feel comfortable expressing ideas and concerns without fear of repercussion, significantly enhancing motivation and innovation.
2. **Inconsistent Feedback:** Consistent feedback, rather than just an annual review, provides employees with timely insights and guidance for improvement, fostering continuous growth and engagement throughout the year.
3. **Misalignment from Top-Down:** Lack of strategic clarity at the top of the organization can make defining 'true north' difficult for both manager and team members.
4. **Manager as Dictator:** The goal is to create a conversation instead of subtly or overtly disempowering the person in the role from sharing their perspective.
5. **Employee Apathy:** Inspiring employee autonomy can be new for some, so sometimes a manager will have to encourage an employee to contribute their perspective.
6. **Frequent Role Shifts:** When high turnover is present or teams shift frequently, it can be easy to gloss over creating clear role alignment. This is a rookie mistake. A seasoned manager knows to slow down and focus on role alignment whenever someone takes on a new role.
7. **Staying in Firefighting Mode:** Busy can often feel productive, but it's not productive in the long run. A seasoned manager knows to slow down long enough to step out of day-to-day tactical check-ins to have this strategic alignment conversation.

Scheduling Alignment Into Yearly Flow

Arrange a 1:1 meeting with each team member at three key moments:

1. Onboarding a new employee
2. During quarterly reviews,
3. When transitioning or promoting to a new role.

Prior to each meeting, distribute The Role Alignment Compass and request each member to fill out the prompts provided before joining the meeting. This is important to state again: both the manager and the employee should each have filled out The Role Alignment Compass before joining the meeting. Then, in the meeting, both parties will exchange their responses to ensure alignment and establish mutual agreements.

Helpful Tips for a Successful Alignment Conversation

To ensure a role alignment conversation is productive, a manager should complete the following process:

1. Introduce the process to a direct report (keep it under 15 minutes) and ask them to take this worksheet to their desk to complete on their own time. Set the context that you want to get even more aligned with them and that this process will help both of you level-set expectations and set them up for success. Remember, this is not a performance review or a 'pop quiz.'
2. Carve out an hour for an Alignment Session: both parties arrive with the completed worksheet to compare notes and create shared agreements. During the conversation, actively listen and ask open-ended questions from a place of genuine curiosity. This creates space for the employee's aspirations, concerns, and feedback, and helps avoid deferring to your answers all the time because of your positional authority. Use this insight to collaboratively complete The Role Alignment Compass, ensuring both parties have a mutual understanding of what excellence looks like for this particular role.
3. Follow up with a copy of the Role Alignment Compass that includes any modifications that may have arisen during the meeting to maintain momentum and accountability.

The Outcome

Both the manager and the team members have clear alignment about the need for the role, the expectations for success, the current scope of work, and the decision-making rights that ensure role sovereignty.

WORKSHEETS

Getting Aligned With Your Team



Step 1: Identify the Need for the Role

When done well, this step identifies the strategic context for both the role and work as seen from an organizational perspective. Lack of clarity is one of the leading complaints – we are often too close to the work to connect day-to-day activities with company direction and strategy. This brings that context to the forefront to help direct the later steps.

Identifying the need for a role within a business is essential for clarity of purpose and motivation for the employee. Going through this process also helps the business identify and fill skill gaps. It increases engagement by ensuring every function has dedicated expertise and focus. And that every manager and employee are in total sync around the “WHY” of the role.

WHY DOES THIS ROLE NEED TO EXIST?

WHERE DOES THIS ROLE END AND OTHERS BEGIN?

Step 2: Identify the Expectations for the Role

Clear job expectations boost employee engagement and morale by removing ambiguity, fostering confidence, and aligning individual roles with company objectives. This clarity promotes a sense of achievement and purpose, leading to a more motivated and productive workforce.

WHAT ARE THE IMPLICIT AND EXPLICIT EXPECTATIONS TO EXCEL IN THIS ROLE?

WHAT NUANCED SKILLS ARE REQUIRED?

WHAT DOES EVERYDAY SUCCESS LOOK LIKE?

Step 3: Identify the Current Focus of Work

Ensuring employees have a clear focus for the next three months is crucial for peak performance. It aligns their efforts with the strategic objectives of the organization within a timeframe that limits procrastination, maximizing the impact of their work and company time. This clarity also enhances individual productivity by enabling employees to prioritize tasks and manage their time effectively.

WHAT IS THIS ROLE WORKING TOWARD RIGHT NOW?

WHAT ARE THE TOP 3 OUTCOMES THAT THIS ROLE IS RESPONSIBLE FOR THIS QUARTER?

WHAT DOES GOOD LOOK LIKE?

Step 4: Define Sovereignty and Ownership of Role

To 'own your role,' you need to know you have the autonomy to deliver on your responsibilities. It is easy for managers to assume a team member is clear on their own decision-making rights or authority. Yet, in reality, these conversations happened a long time ago or not at all. This step will help you clarify any assumptions and misunderstandings so you can build clear agreements.

The goal is for managers to empower their team members by getting aligned on what responsibilities they own. This allows managers to step back and focus on their higher-value activities while the team is fully owning their roles. This might also reveal gaps with some of your team members where they don't have the training, experience, or temperament to own the role.

WHAT DOES SOVEREIGNTY MEAN TO YOU IN THIS ROLE?

WHAT DECISION-MAKING RIGHTS DOES THIS ROLE NEED TO ACCOMPLISH THE TOP 3 PRIORITIES LISTED ABOVE?

WHAT INVISIBLE BLOCKS MAY GET IN THE WAY?

The Role Alignment Compass

THE NEED

Why does this role **need** to exist?

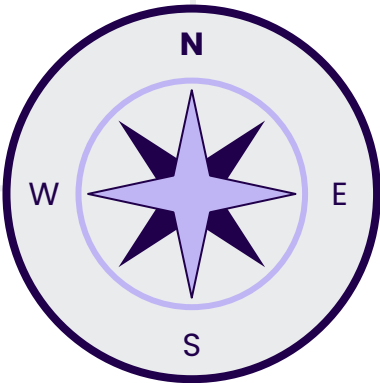
Where does this role end and others begin?

THE EXPECTATION

What are the implicit and explicit **expectations** to excel in this role?

What nuanced skills are required?

What does everyday success look like?



THE WORK

What is this role working **toward** right now?

What are the top 3 outcomes that this role is responsible for this quarter?

What does good look like?

THE SOVEREIGNTY

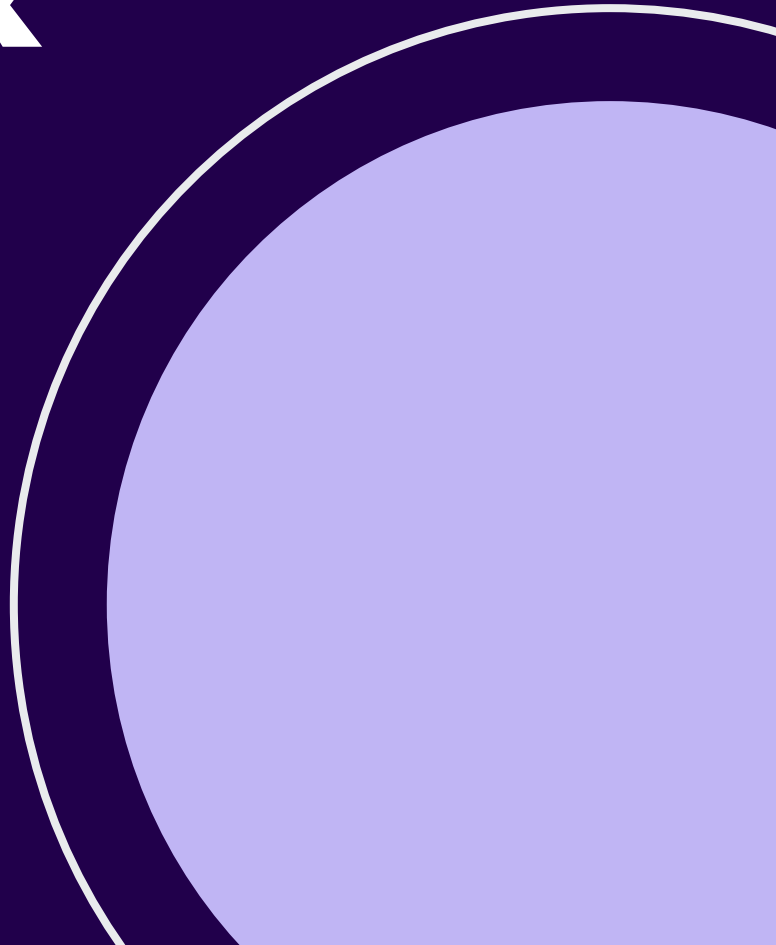
How does one achieve **sovereignty** in this role?

What decision-making rights does this role have?

What invisible blockers may get in the way?

Module 4

Courageous Conversations and the Feedback Flywheel



GUIDE

Courageous Conversations and the Feedback Flywheel



This worksheet equips a leader with the knowledge and tools to:

- Give effective feedback using The Feedback Flywheel
 - Identify the key components of helpful feedback
 - Create a culture of feedback that builds a workplace of continuous improvement
-

Understanding the Value of Effective Feedback

Learning how to give effective feedback is essential for managers because it directly impacts team performance, motivation, and growth.

Yet, so often the hard conversations and difficult feedback are avoided in many company cultures. This is a skill that every leader needs to hone.

Effective feedback guides employees toward their strengths and areas for improvement in a clear, actionable manner, creating a culture of continuous learning and improvement. It also strengthens trust and communication within the team where employees feel valued and understood.

As a result, mastering the art of giving feedback not only enhances individual development but also drives organizational success by building a more engaged, competent, and cohesive team.

Barriers to Effective Feedback

Fear of Negative Reactions: Managers often hesitate giving constructive feedback due to concerns about how it will be received. Worries about demotivating team members or triggering defensive responses can lead to avoiding tough conversations, which ultimately hinders individual and team growth.

Lack of Training: Effective feedback requires skills in communication and emotional intelligence. Without proper training, managers might struggle with how to deliver feedback in a way that is constructive rather than critical, leading to miscommunication and missed opportunities for development.

Time Constraints: In fast-paced work environments, finding the time to give thoughtful, personalized feedback can be challenging. Managers juggling multiple responsibilities may resort to infrequent or generic feedback, which lacks the specificity and timeliness needed to be truly impactful.

How to Receive Feedback

When receiving feedback, consider the following:

Avoid Defensiveness

It's entirely normal to get defensive when receiving feedback because of our invisible wiring as humans. Yet, we can work to get less defensive and better at receiving feedback. We have complementary systems in our nervous systems to amp us up when needed (i.e. 'fight or flight' and calm us down to recharge (i.e. 'rest and digest'. This 'gas/brake' pedal worked pretty straightforward when we were hunters and gathers and mostly reacting to our environment.

One of the challenges of the modern day is that our need for social acceptance and safety can still trigger that 'fight or flight' response in the body - and receiving feedback that tells us we are anything less than perfect can feel like we might be losing social safety and acceptance. "Okay, that all sounds great, but how do I know if I'm being defensive?" Start by noticing the invisible barriers. Let's look at a few key places to start: the mind, the body, and the breath.

The Body: A strong reaction in the body often signals defensiveness. This may feel like a strong sensation such as tightening in the stomach, hunching of the back, shortness of breath, hair standing up, etc. It may also feel as if you're somehow outside your body.

Start by building awareness. A good place to start is pausing after reading a bit of feedback. Try this while alone. What do you notice? Turn your awareness back on yourself - take a moment to 'feel' from the inside. What is your body doing? Scan your posture for closing or collapse, muscles for tightness or heat, and how you are breathing (belly, chest, shallow/deep).

Next, accept what is. Without needing to change your current reality, try saying a small "yes" (out loud or to yourself... "Yes, I feel tightness in my belly and pressure in my head."

Observe again. See if anything changes or shifts as you accept your current circumstances, whatever they may be.

The Mind: What is your mind doing? Are you really listening or are you simply waiting for your rebuttal? Focus on emptying the mind so that you can fully listen to what the person is saying. Practice curiosity and see what you can learn from their perspective.

[Try this] When you find yourself forming a come-back statement in your head, take a breath, and in your head say "Part of me wants to look good right now. I'm building my defense." Notice and accept this reaction without making yourself wrong. Then exhale and see if you are able to be just 10% more present in your listening.

The Breath: A deep breath can help the body relax and the mind settle, helping you to listen more intently. [Try This] Box-breathing: Imagine the breath as a box with four sides: inhale, holding of the inhale, exhale, holding of the exhale. Aim to count to four seconds for each part of the breath: inhale (4 seconds, hold inhale (4 seconds, exhale (4 seconds, hold exhale (4 seconds). Repeat for at least three rounds.

How to Receive Feedback

Say “Thank you”

Gratitude changes everything. A key skill to receiving feedback effectively is being able to see from someone else’s point of view. Even if you can’t see the feedback as valuable in the moment, know that there is always something to learn from feedback.

Remember, all feedback is helpful. This mindset will help you and your team view feedback as a valuable tool for your growth. And it starts with how you role-model receiving feedback! This will go a long way toward building a culture of ownership and trust.

The Key Ingredients of High-Quality Feedback

- ☐ **PERSONALIZED:** Is the feedback specific to the employee?
- ☐ **ACCOUNTABLE:** Does the feedback support growth and excellence?
- ☐ **TIMELY:** Can the employee do something with the feedback immediately?
- ☐ **HONEST:** Is the feedback honest or am I sugar-coating it to avoid conflict?

Personalized Feedback

Personal feedback is more effective than general feedback because it acknowledges an individual's specific contributions and areas for growth, making it more meaningful and motivating. Personal feedback is specific to the individual's actions.

Example 1:

General feedback: "Your team's performance is satisfactory."

Personal feedback: "Your approach to solving the client's problem has significantly improved our project's outcome. Specifically, I noticed how you illustrated data points with personal stories that seemed to ease the client's concerns with extending the contract."

Example 2:

General feedback: "You're doing a good job."

Specific feedback: "Your ability to complete the project two weeks ahead of schedule, especially how you organized the team meetings and delegated tasks efficiently, really made a difference in meeting our quarterly goals."

Accountable Feedback

For the feedback to stick, it needs to connect to the role expectations that help the employee see how this feedback directly helps them perform better in their role and progress in their career (see The Role Alignment Compass. This ensures the feedback guides employees in honing their skills, increasing their confidence, and achieving their full potential.

Consider this: researchers* found feedback to be 40% more effective when a leader uses this phrase to initiate the conversation: "I'm giving you this feedback because I have very high expectations and I know that you can reach them."

Example: "Your analysis of the quarterly sales report was insightful, particularly in identifying underperforming regions. However, to make your recommendations even more impactful, I suggest incorporating specific, data-driven strategies for improvement. Enhancing your skills in data analysis and presentation could further elevate your contributions to our team and support your professional development. I'm giving you this feedback because I have very high expectations and I know that you can reach them."

*Yeager, D. S., Purdie-Vaughns, V., Garcia, J., Apfel, N., Brzustoski, P., Master, A., Hessert, W. T., Williams, M. E., & Cohen, G. L. (2014). Breaking the cycle of mistrust: Wise interventions to provide critical feedback across the racial divide. *Journal of Experimental Psychology*

Timely Feedback

When feedback is delivered close to the event it pertains to, it's easier for the recipient to recall the details of their actions and the context, making the learning more meaningful. Timely feedback helps to reinforce positive behaviors, correct issues before they become habits, and maintain a dynamic of continuous improvement and agility within the team.

Be specific about what changes the team member can make immediately.

Example to reinforce positive behavior: "I noticed in today's client meeting that you effectively addressed their concerns about project timelines, providing a detailed reassessment on the spot. Nice work. I'm curious how a brief outline of potential questions with pre-drafted responses would further strengthen our client relationships. What do you think?"

Example to correct the issue before it becomes a habit: "I notice that you cc me on what seems to be every email to the client. I want you to have full sovereignty in this role. Instead of cc'ing me on emails, reach out to me whenever you want specific feedback on your messaging or guidance with a client."

Honest Feedback

Honest feedback provides employees with a clear understanding of their performance and what is expected of them. This authenticity encourages a culture of open communication where team members feel valued and supported in their personal and professional growth.

A manager should prioritize honest feedback over the sandwiching technique because directness ensures clarity and effectiveness in communication. While the sandwiching technique—where critical feedback is "sandwiched" between positive comments—aims to soften the blow of criticism, it can often lead to confusion or dilute the importance of constructive feedback. Employees may focus more on the positive aspects and overlook the areas needing improvement, or they might become skeptical of praise, viewing it as merely a precursor to criticism.

Example: During today's presentation, each slide had more than 4 bullet points and felt a bit overwhelming with information. In my experience, it would be more effective to streamline the content so that each slide focuses on one main point at a time, making it easier for the audience to absorb the details. I'm giving you this feedback because I have very high expectations and I know that you can reach them. What do you think?

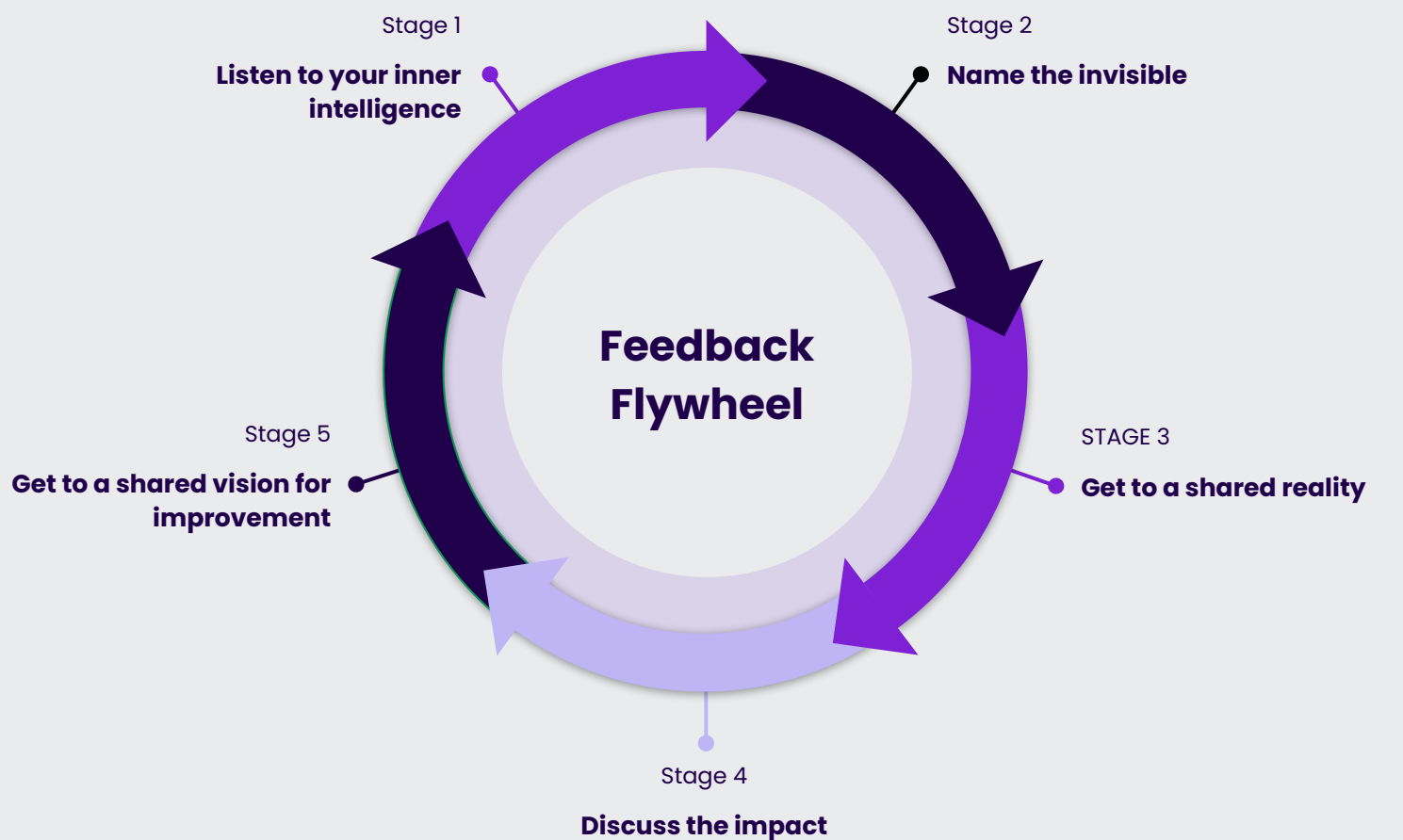
WORKSHEETS

Courageous Conversations and the Feedback Flywheel



Feedback Flywheel

The Feedback Flywheel is a tool to help managers give high-quality feedback to their teams more regularly. This consistency builds momentum and creates a culture where feedback is normalized and employees feel supported by management.



Step 1: Listen to your Inner Intelligence

Whether it is a frustration you feel, a hunch that something is getting missed, or a sense of being exhausted from a recurring conversation, our inner intelligence is a powerful guide. Take this as a signal to initiate feedback with an employee. Before initiating feedback, take a moment to reflect on how the discrepancies or missed opportunities you have observed directly relate to The Role Alignment Compass.

What is your inner intelligence telling you?

Step 2: Name The Invisible

Clearly describe the observed behavior or pattern that needs attention. This is about being direct and transparent, effectively bringing the "elephant in the room" into the discussion.

Examples

- Consistently missing deadlines despite reasonable timelines
- Handling client complaints in a defensive rather than solution-oriented manner
- Not delegating tasks effectively, leading to overburdening oneself and underutilizing the team
- Occasionally being late to work or important meetings
- Rarely suggesting new ideas or improvements during brainstorming sessions
- Submitting reports with errors or insufficient data analysis
- Not participating actively in team meetings or discussions
- Sending unclear or incomplete email communications to clients

Describe the observed behavior or pattern that needs attention.

Step 3: Get to a Shared Reality

Encourage a two-way conversation by asking open-ended questions to understand the employee's perspective and awareness of the issue. Explore together any reasons behind their actions and behaviors. This helps in creating a shared understanding of the situation. The more you lead with genuine curiosity about their experience, the less likely you will elicit a defensive response.

Describe the employee's perspective below.

Step 4: Discuss the Impact

Discuss the consequences of the current behavior or performance on their job and the wider team. Highlighting the impact helps the employee see the broader implications and the importance of change.

What is the impact on their job and the wider team?

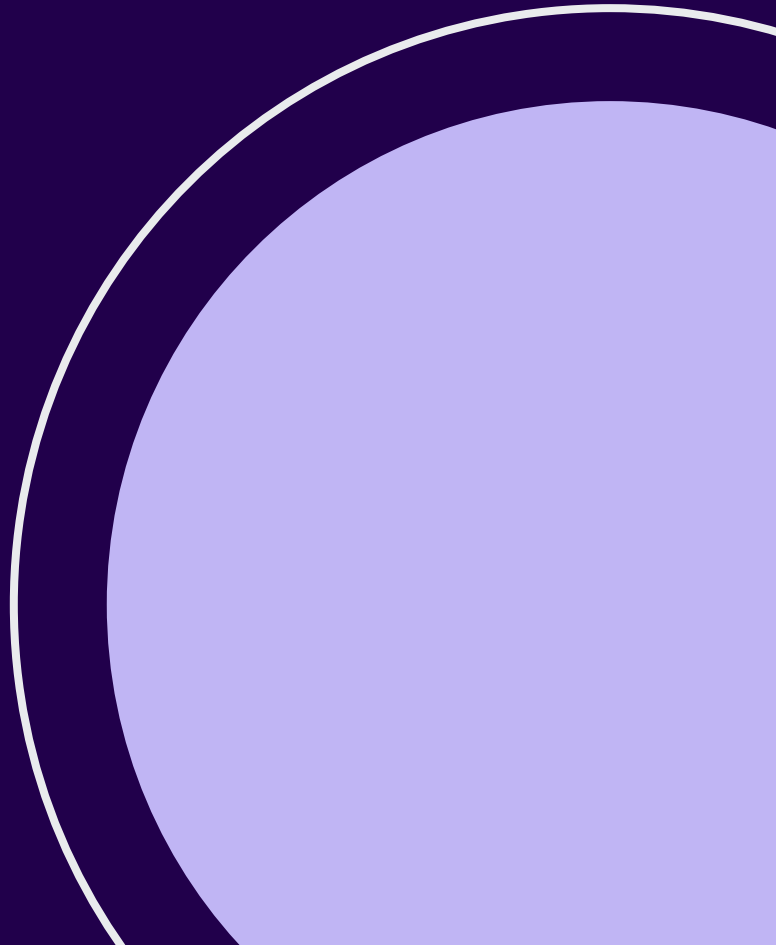
Step 5: Get to a Shared Vision for Improvement

Conclude the feedback by collaboratively identifying actionable steps for improvement. This might include setting specific goals, adopting new behaviors, or making commitments to change. Ensure that these steps are clear and agreed upon by both you and the employee. And if necessary, what are the consequences if these actions are not followed through on to the standard you agreed on?

Describe the vision for improvement below

Module 5

Managing Conflict Effectively



GUIDE

Managing Conflict Effectively



Introduction

Resolving conflict is imperative for cultivating a healthy workplace culture. It stands as one of the most important skills for deepening trust and enhancing leadership effectiveness. When challenges and disagreements arise, they signify a functioning team. Yet this critical leadership skill is rarely discussed or taught directly at work. It's often left with HR to deal with, which doesn't empower managers and leaders to deepen relationships with their teams or colleagues and be better equipped when conflict arises.

Here we'll get into some of the myths around conflict, why we tend to avoid it, and how to embrace conflict in a way that promotes a diversity of perspectives, the ability to disagree, and ultimately leads to more innovation.

This worksheet will walk you through three key components of managing conflict:

- Mindset Reframe
- De-escalating Our Own Stress
- Repairing a Ruptured Work Relationship. (Psst...this works for personal relationships too).

The Mindset Reframe

The **mindset reframe** is that conflict is an opportunity to be more authentic, get more curious about other perspectives, and deepen relationships as a result.

We are accustomed to believing that conflict is bad because it feels bad. This is one-part biological. We want to feel at peace, happy, and comfortable. Conflict, on the other hand, promotes the opposite effect. Conflict can feel uncomfortable inside, create symptoms of stress internally, and add to mental noise.

The reframe is that conflict is normal and can lead to deeper connection. Challenges, disagreements, different perspectives, competing priorities, etc, these sources of conflict help us grow as leaders.

So consider this...Instead of shying away from it, what if conflict is simply feedback to level up our leadership??

The Metaphor of the Bison and the Cow

What is one of the key differences between a Bison and a Cow? In a storm, cows will huddle together and run as fast as they can away from the storm. They are exhausted, and by the time the storm arrives, they are battered with no energy reserves.

Bison will instinctively run into the storm and face it head on and be over with it, sooner. They have more energy reserves as they didn't run away from the storm depleted. They dealt with the intensity of the situation and it passed more quickly.

The Punchline: while engaging in conflict might seem more intense, by dealing with it directly, we don't carry around the burdens of the invisible conversations that weigh us down. We learn to become more proficient in these skills and get through to the other side of the storm faster and more skillfully, and with more energy reserves!

Reflection: Think of one situation where you walked into conflict like a Bison and one positive thing that came out of that. Write this down for yourself and use it as motivation as you consider a current conflict that you can address head-on.

The Neuroscience of Resilience and Tenacity

Researchers have discovered that the anterior midcingulate cortex (aMCC) is the center for tenacity and resilience in the brain. It actually grows when we complete unwanted tasks. When we overcome challenges. It's the center of grit, resilience, and willpower. It is something that you build and develop and it grows when we do the things that we don't want to do.

In obesity, researchers have found that the aMCC shrinks. When that person goes on a diet, their aMCC tends to grow (the thing they resist or don't want to do. For people with a longer life span, the aMCC tends to keep a larger size than those that don't. So it might not just be connected to willpower, but even more deeply, the will to live.

The Punchline: the center for grit, will, and tenacity actually grows when we do the things we don't want to do. Whether that's jumping into a cold plunge, or having a hard conversation with your manager that you've been avoiding, this is an opportunity to practice and develop your resilience. It can literally be developed and strengthened over time.

As the famous Mike Tyson adage goes: "Discipline is doing what you hate to do, but nonetheless doing it like you love it."

Growth vs Stagnation

One of the key sources of inner conflict is that there is a younger, immature part of us that wants to stay comfortable, not rock the boat, not risk consequences for speaking out, afraid of retaliation or getting rejected, and will always choose ease over difficulty. Pleasure over pain.

As we evolve and mature, we realize difficult circumstances build resilience and character. If we don't face adversity and learn skills to overcome it, we stop learning new things and evolving. Friction is a part of growth.

The pearl in the shell doesn't become the pearl without the friction from the sand. You cannot become who you are without friction.

As leaders, we are here to grow, evolve, and learn.

Let's discuss some effective tools on how to best manage conflict when it arises.

De-escalating Our Own Stress

When our nervous systems are too amped up in a conflict, research suggests that we actually stop taking in new information. When our system gets too hot or we notice this in the other person, it's not productive to continue the conversation in this state. The key is to identify when you or the other is getting too elevated and to find tools to de-escalate the tension.

Step One: Slow Down and Breathe

Slowing down and breathing is the fastest way to de-escalate the nervous system. When we get into 'fight or flight' mode, slowing down our breathing initiates the parasympathetic response, which is about 'rest and digest.'

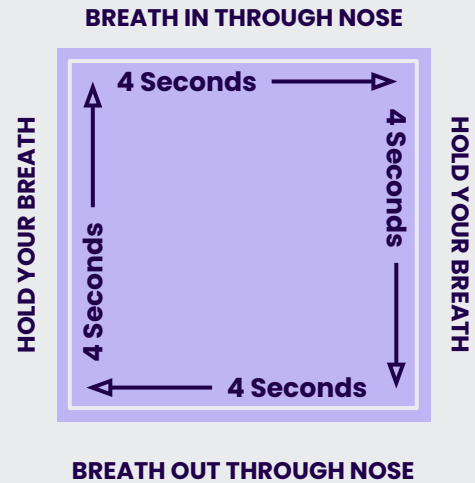
When you slow down and breathe, you are not only regulating your nervous system, you are also influencing other people's nervous systems around you as they will start to follow in rhythm.

This helps de-escalate a tense situation.

Put another way. If you want to de-escalate a conflict at work, put your oxygen mask on first. As you calm down, others calm down.

Breathing Practice: Box Breathing

Box Breathing is a breathing technique used by the Navy SEALs that helps calm your nervous system and reduce stress. It consists of a specific pattern of inhalation and exhalation. Here's how to do it:



Inhale Fully: Take a deep breath in through your nose, filling your lungs completely with air for a count of four.

Hold Your Inhale: Without exhaling, hold your breath for a count of four while your lungs remain full.

Exhale Slowly: Now, exhale gently through your nose until you've released all the air from your lung for a count of four.

Hold Your Exhale: Now, exhale gently through your nose until you've released all the air from your lung for a count of four.

Repeat this pattern two or three times as needed. This technique can quickly help to reduce feelings of anxiety or stress by regulating the balance of oxygen and carbon dioxide in your body and activating your parasympathetic nervous system, which promotes relaxation.

By lowering stress, a manager can enhance their focus, improve problem-solving abilities, and maintain a composed demeanor, which is essential for effective leadership. This can inspire confidence and trust among team members, fostering a more positive and productive work atmosphere.

Step Two: Set a Boundary

If it gets too emotionally charged to the point of not being a productive conversation, set a boundary for yourself and let the other person know that now is not the best time to have this conversation. Step away and announce when you can come back to complete the conversation.

“Doug, I don’t think continuing this conversation is going to be productive. I need time to cool down. Let’s resume this first thing tomorrow morning. Does that work for you?”

If you recognize that you or the other person are too activated, this can be the best thing to do to slow down and allow cooler heads to prevail. Naming a time to come back to the conversation is key, as it alerts both parties that there will be a proper time to complete the conversation vs leaving it open-ended.

Boundaries are a way to exert self-respect and self-care.

Resilience is an important skill to build in your ability to stay in the conversation, and it’s also important to know where your limits are if the intensity is too extreme.

Repairing a Ruptured Work Relationship

When conflict comes up, how do we reconcile? How do we re-engage? Most of us didn’t have good models for how to repair. We can see this in the workplace, in the public sphere, as well as at home in our family systems.

‘Resolving conflict’ can often be more focused on who was right and wrong. This approach is counterproductive. It tends to further fan the flames of conflict. It is procedural in that the focus is more on what happened and can unintentionally lean on positional authority (the one that has more power in the dynamic gets to be right).

The process of ‘repair,’ in contrast, zones in on the relational dynamics. It starts from a frame that acknowledges both parties contributed to the issue at hand. Owning our parts, acknowledging impacts without blame, and resetting agreements going forward repairs the working dynamic at a human level and sets behavioral agreements to boost trust.

If we don’t repair, we don’t integrate the feedback and get to grow from the tension. When there’s no integration, we are destined to do it again because we didn’t integrate it. Read that again.

Follow these three simple steps, on the next page, to help repair a rupture.

Step One: Take Ownership and Responsibility

One of the fastest ways to de-escalate conflict is to lead by taking ownership and responsibility for your part in the dynamic. This can be very challenging as we are wired to 'win' a conflict or avoid it entirely.

Remember this: The desire to 'win' in a conflict is a losing strategy.

The key here is to lead with vulnerability, honesty, and transparency, which will help encourage the other party to do the same. This is leading. And it's not easy. Even if you've been 'wronged,' what is your contribution to the dynamic? By starting the dialogue here, you open up the space for mutual ownership, understanding, and reconciliation.

"Here is my contribution. I recognize how my choices impact you. Here's how I imagine this felt for you," etc. Vs. "You did this to me and you can't do this again."

Example Scenario

In a team meeting where a project deadline was missed, causing tension between team members, a manager takes ownership by saying, "I recognize that the deadlines set were ambitious and didn't account for all the challenges we faced. It was my responsibility to ensure we had a realistic timeline and adequate resources. I acknowledge the impact that this had on you all. Let's work together to identify what went wrong, learn from this experience, and develop a plan that addresses our current challenges more effectively. Your insights will be invaluable in this process." This response acknowledges the manager's role in the situation, shifts the focus from blame to solution-seeking, and encourages collaboration and open communication.

Step Two: Share the Impact

Another courageous step in this process is to be willing to hear each other and share the impacts. You can always debate about the facts, who's right, etc. But it's impossible to deny someone's experience and impact. That is to say, you are 'getting their world' – understanding their perspective, and validating their experience – without having to agree with their position. This side steps unnecessary finger-pointing and gets to the root of most conflict: the emotional component. Overall, this allows the repair to happen more effectively.

One helpful tip is to focus on the issue, not the other person. This will make the other party less defensive.

Example

(When ____ (specific action____ occurs, the impact for me is ____ (felt experience_____.)

"When you don't come to me directly with your requests and instead go around me to my manager, the impact is that my authority is undermined."

"When you don't respond to my emails, the impact for me is that I get upset and am left with the experience that you don't value my time."

Pro Tips

Avoid absolutes "you always," stick to specific incidents (time/place, avoid telling them what they intended or how they feel "you are always overstepping your place... you keep trying to undermine my authority." Don't state your impact/inference as the action (eg: when you undermine my authority by going around me to my manager, the impact for me is ...".

The key for this step to be successful is both parties being willing to listen to each other, stay curious, and seek to understand. When someone feels understood by you (even if you don't agree with them, you will see their shoulders drop, body relax, and be more open to working through the conflict to get more aligned.

Step Three: State Your Need and Make a Request

The last courageous step of the repair process is to now share what you need moving forward. What is your request of the other person or what are you taking ownership of in how you'll do it differently next time?

Examples

"My request is that when you have challenges that you need help with [**Setting/trigger**], come to me directly [**requested action**] and I'll do my best to help you solve them. [**what I take ownership to do differently**] Any questions?"

"My request is that when you are going to miss a deadline [**Setting/trigger**], communicate with me as soon as possible [**requested action**] and let me know what support you need from me.. [**what I take ownership to do differently**] Any questions?"

Summary

In summary, healthy conflict is critical for growth and development. Learning how to build resilience, work through difficult conversations, and come through them with stronger bonds and understanding is what builds trust and creates a higher-performing team.

Healthy conflict is a vital skill for leading and managing people and is the doorway to greater innovation and creativity. When you know that there is room in your company culture for debate, disagreement, challenging the status quo and inviting other perspectives, people thrive. People grow. And this is one of the most important aspects of creating a high-performing culture.

WORKSHEETS

Managing Conflict Effectively



The Mindset Reframe

When faced with conflict, remember this: conflict is an opportunity to be more authentic, get more curious about other perspectives, and deepen relationships as a result.

What is the opportunity here?

(e.g. less tension between teams, an agreed upon change to mitigate future conflict, greater understanding of my own triggers and how to de-escalate more quickly, etc.)

De-escalating Our Own Stress

By lowering stress, a manager can enhance their focus, improve problem-solving abilities, and maintain a composed demeanor, which is essential for effective leadership.

What is my go-to method to quickly de-escalate stress?

(e.g. box-breathing, taking a pause and repeating positive affirmations to myself, etc.)

What is the boundary that will remind me it's time to step away and come back to the conversation later?

(e.g. when I notice that I want to 'win' an argument, when my breath shortens and my body feels tight, when I feel hot in the head, etc)

Repairing a Ruptured Work Relationship

When conflict comes up, how do we reconcile? How do we re-engage? Follow these three simple steps to help repair a rupture:

Step One: Take Ownership and Responsibility

What did you do (or not do) that contributed to the conflict? Consider leadership style, a habitual pattern, tone of language, etc.

Step Two: Share the Impact

When ____ (specific action) ____ occurs, the impact for me is ____ (felt experience) ____.

"When you don't respond to my emails, the impact for me is that I get upset and am left with the experience that you don't value my time."

"When you don't come to me directly with your requests and instead go around me to my manager, the impact is that my authority is undermined."

Step Three: State Your Need and Make a Request

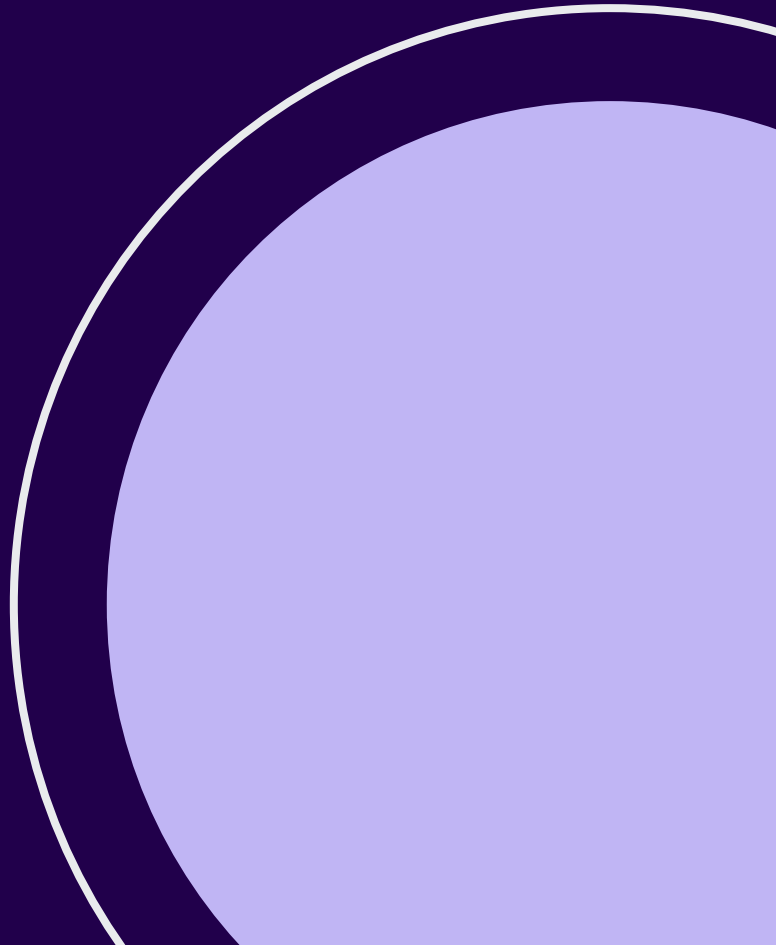
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Module 6

Coach Up Your Team to Scale Growth



GUIDE

Coach Up Your Team to Scale Growth



Introduction

Now that your team has completed the growth alignment compass, you have a shared picture of excellence in that role. Let's look at how you can further fastrack them to own the role fully. When we talk about growth, we frequently focus solely on the measurable; sales and revenue numbers, deliverables, KPIs and OKRs. This is, of course, a vital foundation. And, the real magic happens when you focus on developing your people. That is to say, on helping them frame up what mindset and behavior shifts will help them truly fill out the role to its fullest. We're talking about becoming the kind of leader that coaches and inspires the next generation of leaders to elevate their impact.

Yet, most leaders have rarely had a place to develop the skills to do this effectively. This section fills in this gap and teaches leaders how to shift into a coaching mindset, one that truly motivates the team to uplevel performance, increase employee retention, and become a magnet for top talent.

Growth = Support + Challenge

One of the key distinctions we make is that for an optimal growth culture, there needs to be both support and challenge. This means providing an inclusive environment that welcomes new ideas, encourages failure and trying new things. It also means challenging the status quo, getting people to stretch and think differently, and lead them towards new experiences of themselves and what they are capable of as leaders.

What makes this work is when your employees (or when you give feedback to peers or senior leaders can sense that you are coming from a place of growth and development. In other words, when you are motivated by holding people to the best version of themselves, they feel this. If instead, your actions and developmental feedback is infused with a sense of frustration and stress, or perhaps even your own insecurities or anxieties, they feel that too.

One of the most intuitive aspects of being a manager is sensing what ratio of support versus challenge each member of your team needs from you right now to thrive. And listening for how you need to adjust this over time. Being able to intuit the needs of your team (by asking them powerful questions is the art and science of effective management.

How can you meet the moment and keep people in their learning/growth zone? Our answer and the purpose of this worksheet: Keep harnessing a coaching mindset as you identify gaps and coach up their strengths.

Shifting from Managing to Coaching Mindset

No one likes a micromanager. It keeps leaders in the weeds, decreases quality performance, and demotivates the team from fully owning their roles. So how does a leader shift from the manager mindset to a coaching mindset without becoming a micromanager? This looks like getting clear on expectations, collaborating with your team, and allowing them space to lead which results in greater trust. Instead of micromanaging their activities or saving the day by doing all the things yourself, you step back enough to create a meaningful gap that stretches their performance and then coach them up in the moments of coming up short.

- Key Coaching Behaviors
- Active listening that inspires empathy
- Asking probing questions that spark self-discovery instead of spoon-feeding answers
- Inviting-in feedback from direct reports

A company that leads with a coaching mindset creates a culture where mistakes are seen as growth opportunities, not failures. This shift builds trust, yes, but it also drives the organization to push boundaries and grow because everyone on the team feels a sense of ownership. This is how teams become more engaged. This is how you build an award-winning company.

Lead First

During this exercise, each member of the team is asked to identify a key growth edge to focus on that aligns with their vision as a leader. This is typically a behavior or a mindset that is thwarting your progress or effectiveness. Get candid feedback from your team about your own growth edge. Role-modeling what you are working on leads to a culture of openness and trust, where everyone feels valued and empowered to contribute to the organization's success.

To take it one step further, one powerful prompt you can use is "What's one way that I create more obstacles for you or make things more difficult, that you think I'm not aware of as your manager?" This builds trust and models openness to feedback and inclusive leadership. It also gives you clues about your own growth theme for your ongoing leader development.

Establish Rhythm

Complete this growth edge exercise every quarter, when onboarding a new hire or an employee from another team, or someone who's been recently promoted into a new role.

Create a Zone for Growth

One of the secrets to peak performance is this: there are both learning and performance zones – and great athletes/coaches know how to create spaces for both so they can both improve and perform. This is how Olympic athletes make it to the podium. This is how good companies become great.

The main idea is this: Growth doesn't happen when we play safe. Growth happens when we find our edge and stretch beyond it. And to do this, we need a low-risk environment that feels supportive and challenging.

Yet, leaders rarely create an environment for both. To do so takes courage and commitment.

A learning zone has low risk. Think of an athlete in a home gym upping the weight to get stronger. Or Tiger Woods trying out a new swing even when he is already considered the greatest golfer. The goal is to experiment, to prototype, to find an edge, and stretch it. There is no negative consequence to failing in the learning zone. In fact, if you're not failing, you're not learning. The goal is continuous improvement.

A performance zone, on the other hand, has high risk. Think of the pressure of competing at the Olympics and winning the gold medal. These are the moments that are measured and performance is judged. Everyone wants that, of course.

Performance zones are ever present in the workplace. To most employees, everything may feel like a performance zone. Like they are being measured and judged on every action. Micromanaging reinforces this perception. This is why learning zones are rare and cherished by those who have leaders with a coaching mindset.

To inspire innovation and growth, employees need to feel like they can fail without it costing their careers. As a leader, it is your responsibility to clearly express this to the team, and even more importantly, model this through your behavior and choices. The focus here is providing low-risk feedback on the observable everyday behaviors that help each employee grow one step closer to their vision as a leader.

Ask Powerful Questions

The coaching mindset requires leaders to ask powerful questions. Yet, most leaders need help learning to do this. It can be much more difficult to take a pause, ask questions, and coach someone to the solution, especially when doing it yourself is faster and guarantees the outcome you know is needed. This will take practice and so consider this training to be a learning zone for you to experiment asking better questions.

A powerful coaching question is:

- **Open-Ended:** sparks a deeper response and is not a yes/no question
 - Instead of “Do you understand?”, ask “What parts of this are unclear?”
 - Instead of “Did you find that meeting helpful?”, ask “What from the meeting was most helpful for you?”
 - **Probing:** delves deeper and uncovers underlying issues
 - Instead of “What was the result?”, ask “What specifically led you to that conclusion?”
 - Instead of “Why were you late?”, ask “What may be the underlying pattern here?”
 - **Future-Focused:** encourages progress and momentum
 - “What small step can you take today to lead you toward this goal?”
 - “How can I best support you moving forward?”
-

Actively Listen

A great coach gets their team to feel like they are heard and seen. Managers need to truly hear what their employees are saying, understand their perspectives, and empathize with their experiences. This means focusing fully on the speaker, asking powerful questions, and reflecting back to them what is heard.

Barriers to a Coaching Mindset

1. **Time Constraints:** Adopting a coaching mindset involves dedicating time to understanding and developing team members, which can be challenging in fast-paced or high-pressure environments where immediate results are prioritized.
2. **Losing Control:** Leaders may fear that moving to a more collaborative and empowering approach might diminish their authority or control over outcomes, especially in a results-driven culture.
3. **Lack of Buy-In from Above:** If the broader organizational culture does not support coaching practices, leaders may face resistance from both higher-ups and team members when trying to implement this style.

WORKSHEETS

Coach Up Your Team to Scale Growth



Introduction

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Yet, most leaders have rarely had a place to develop the skills to do this effectively. This section fills in this gap and teaches leaders how to shift into a coaching mindset, one that truly motivates the team to uplevel performance, increase employee retention, and become a magnet for top talent.

Bridging The Gap

The whole essence of coaching is:

1. Where do you want to be?
2. What's getting in the way?
3. Identifying the underlying issue.
4. Coach the Gap.

In this exercise, you will identify the vision you have for the next steps in your career and then a growth edge to focus on that bridges the gap toward this vision. You will be asked to identify the observable behaviors to bridge this gap and then share this with your manager (or team), inviting in feedback to help you grow closer toward your vision.

Step 1: Identify Your Vision as a Leader


Imagine yourself one year from now as a leader with no limits. You may be tempted to think about ways in which accomplishing goals has been difficult for you in the past, or about the barriers that have gotten in your way. For the purpose of this exercise, imagine a brighter future in which you are your best self and your circumstances change just enough to make this best possible life happen.

Be as specific as possible. Imagine exactly what you do, who you would work with, and where you are. The more specific you are, the more engaged you will be in the exercise and the more you'll get out of it.

What conversations are you having? What impacts are you making? What initiatives are you influencing and partaking in? What accomplishments are you executing on? How have you grown as a leader? Consider your daily routine, how do you show up to meetings? What would you say yes to and say no to? How you would organize your time, dress, etc. What habits best support this vision?

For example

*I am more efficient with my time, have a say in high-level decision-making, and use my time strategically to move the needle forward. I get Sh*t done and stay out of the weeds. I'm no longer afraid to hold my team accountable and I give constructive feedback every week. I write down three things to accomplish each day and organize my day around them. I run efficient meetings and remain open to my team's perspective. I am able to make it home for dinner every day with my family. And when I am at home, I am fully present with my family, having created a healthy work-life integration.*



Step 2: What's the Gap?

When you are honest with yourself, what is getting in the way of you bringing this vision to life today? Consider how you sabotage your own growth. What holds you back? Focus on what you have complete ownership over (instead of blaming others).

For example

I don't offer suggestions in meetings because I don't feel senior enough.

I sit in meetings because I feel obligated yet don't really know why I am there. And I don't voice this to my manager.

Even when I am done with my work, I don't feel comfortable being the first to leave the office so I can get home to my family on time. So, I wait for others to leave first.

I keep adding to my to-do list.

I keep running a meeting instead of ending it earlier.

I don't really feel safe taking risks at work.

Step 3: Identify Growth Edge as a Leader

With this gap in mind, what is your growth edge to focus on right now? In other words, what leadership edge do you want to focus on that will fast-track where you want to be a year from today? It's often a mindset or behavior that is not productive and thwarting your progress.

Leadership Growth Edge Examples: [\[Page 71\]](#)

Step 4: Identify Observable Behaviors

Based on your growth edge, what are three observable behaviors and/or actions that you can focus on right now that help you advance your growth edge?

For example

- Start meetings on time and ensure someone (or AI) takes notes instead of waiting for everyone to arrive.
- Create simpler agendas for every meeting and end the meeting when the agenda has been completed.
- Ensure each person knows why they are in the meeting and give them permission to leave before the meeting ends.
- Practice box breathing before and after every meeting to self-regulate my own stress
- Instead of waiting for others to speak first at meetings, offer my perspective even if it feels vulnerable
- Practice giving constructive feedback to my team at least 3 x week
- Ask for specific feedback more regularly: i.e. from my manager, peers, direct reports.

Step 5: Identify Obstacles

What external obstacles may get in your way?

For example

As soon as I train a new hire, a veteran employee leaves
A team member shows up late to the meeting
One item on my to-do list takes longer than expected and I want to get home to my family

External Obstacles

How may you overcome these external obstacles? Complete this sentence,
If *(external obstacle happens*, then I will *(plan to overcome*.

For example

If (a team member shows up late to the meeting, then I will (start the meeting on time and send the recording/AI transcript to the team members afterward.

If (my work tasks take longer to complete each day and I am late to get home to my family, then I will (consult with my coach about getting more realistic about how long things take me to complete).

Internal Obstacles

What internal obstacles may get in your way of living out these habits and behaviors?

For example

- I experience negative self-talk and a decrease in confidence
- I get too close to a project and lose sight of the bigger picture
- My ego gets inflated
- I am one step away from burnout

How may you overcome these internal obstacles? Complete this sentence,
If (internal obstacle happens, then I will (plan to overcome.

For example

- If (I feel one step away from burnout, then I will (schedule self-care into my calendar and communicate my need for additional support in advance.
- If (I get too close to a project and lose sight of the bigger picture, then I will (ask a peer who is not on the project for their perspective).

Leadership Growth Edge Examples

Emotional Intelligence: High emotional intelligence is crucial for understanding and managing personal emotions and those of others. It enhances communication, conflict resolution, and empathy, which are vital for effective leadership.

Intuitive Intelligence: Intuition is a form of instinctive knowing, often described as a “gut feeling” or an insight that comes suddenly. It is one of the most critical yet underappreciated skills that unlocks two key advantages: 1 your ability to read the room, and 2 to anticipate what wants to happen next.

Strategic Thinking: Leaders must be able to think strategically to anticipate future challenges and opportunities. This involves understanding the broader market and organizational dynamics and aligning the team or company's goals with these insights.

Adaptability: The ability to adapt to changing circumstances and challenges is essential. This means being flexible in decision-making, open to new ideas, and capable of managing transitions or transformations within the organization.

Communication Skills: Effective leaders must communicate clearly and persuasively. This includes not only speaking and writing but also listening actively and being able to tailor messages to diverse audiences.

Visionary Leadership: Having a clear vision and being able to inspire others with this vision is a powerful leadership quality. Leaders should be able to motivate and guide others towards achieving long-term goals.

Decision-Making: Being decisive yet thoughtful is crucial. This involves analyzing information quickly and accurately, considering various perspectives, and making informed decisions that align with the organization's objectives.

Team Building: The ability to build, manage, and lead teams is fundamental. This includes nurturing talent, encouraging diversity, fostering collaboration, and creating an inclusive environment where all team members can thrive.

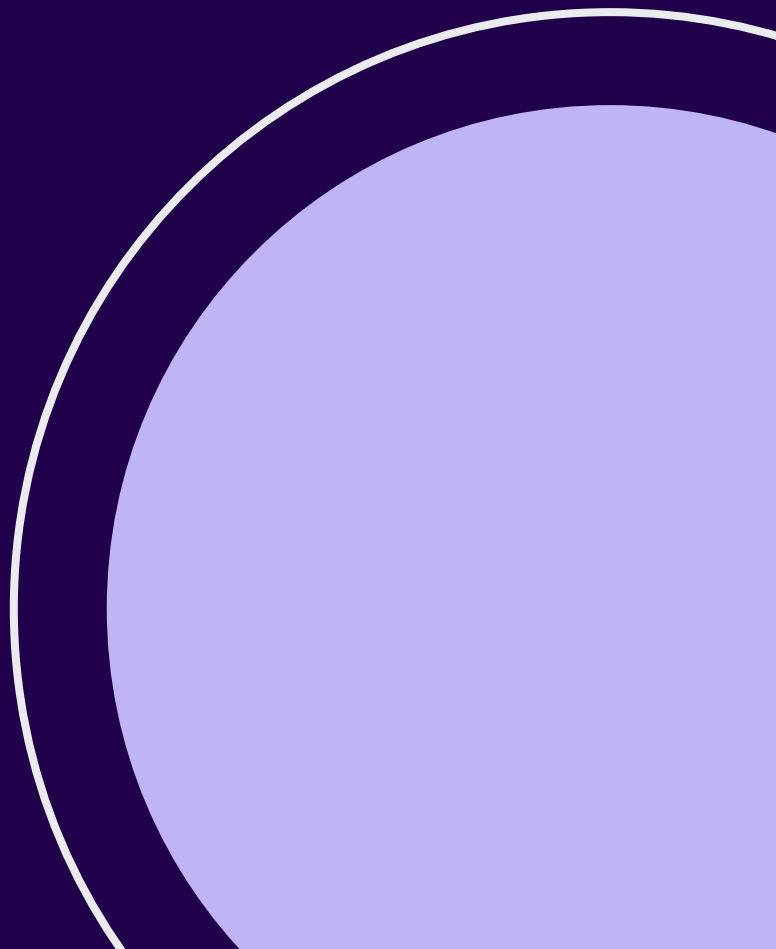
Accountability: Leaders must hold themselves and others accountable for their actions and commitments. This builds trust and establishes a culture of responsibility.

Ethical Leadership and Integrity: Strong moral principles and ethical behavior are the foundations of trust and respect in any leader. Commitment to doing what is right, even in challenging situations, sets a tone for the entire organization.

Resilience and Perseverance: The ability to bounce back from setbacks and persist in the face of difficulties is critical for long-term success in leadership roles.

Module 7

Running Effective 1:1s



GUIDE

Running Effective 1:1s



Why are 1:1s so important?

Running effective 1:1s is one of the key management systems that helps your organization execute on its goals. It helps build rapport and trust between a manager and their direct report, align on expectations and standards of good performance, communicate company-wide or departmental changes, identify and problem-solve early on, and allows time for developmental coaching and upleveling your direct reports, which allows them to take on higher-level work.

It is also one of the key ingredients to allowing time and space to coach up your team, which increases their level of engagement and productivity. People who are growing at work stay there. Getting this right will dramatically impact your attrition and retain and develop your talent.

The Problem and the Opportunity

Often employees are overwhelmed with the quantity of meetings in their organization that they lose focus on how to get the most out of their 1:1s. 1:1s often become a review of tasks and updates, are often inconsistent and uninspiring at best, and rescheduled/canceled at worst. Not much time is focused on the developmental coaching opportunities of your team members.

Spending time mentoring your people is the very thing that keeps them engaged, learning new approaches, being able to take on more accountabilities, and fosters their career path.

1:1 Structure

How do you systematize effective 1:1s company wide? Here's a template you can adapt to your Org that has shown to be effective across Orgs that we work with.

- 1. Come to the meeting with an established agenda ahead of time.** This can either be initiated by the manager or delegated to the direct report. Make sure there is time for both parties to add their shared agenda items to the meeting agenda before the meeting starts.
- 2. Open with something personal.** Ask about how things are going outside of work, a recent vacation you know that they took, one thing that they are excited about outside of work, etc. Remember that you are not just connecting with the role, but the person inhabiting the role. When people feel like you are interested and care about them, they are more inspired to perform at their best. (Ideally no more than 5 minutes as you want to open up communication but not distract from the reason you are meeting in the first place)!
- 3. Communicate any company or departmental updates/changes.** Use this time to personalize any new initiatives that may affect your direct report or anything that they need to be kept in the loop about.
- 4. Task review and updates.** This is the standard part of most 1:1s, reviewing tasks and projects that the direct report is responsible for. This is an opportunity to have your direct report share-out progress, key stumbling blocks, and any requests for help in order to meet their deadlines with the quality of work that you expect.
- 5. Solution-focused problem solving.** Create space to more deeply explore any roadblocks on the project or task, friction with other team members or stakeholders, and get your direct report's ideas on how to solve these challenges (getting them to critically think), before offering your ideas.
- 6. Developmental Coaching.** This is the key area most managers don't do regularly: picking a developmental theme (usually a mindset, behavior, or action) that is getting in the way of upgrading their performance. Ideally these themes would be identified in a previous meeting and then progress can be tracked together to help the employee develop their leadership skills. **Pro Tip: allowing up to 40% of your session on Steps 5 and 6 will completely change the game in the quality of your 1:1s as you are helping them solve their own challenges and coaching them up on key areas to help them grow in their role and advance in their career.*
- 7. Review action items and deadlines before the next meeting.** Help your direct report stay clear on next steps as you guide them to completing their projects and tasks, expectations on standards and quality, and leaving them with an appreciation and something inspiring that has them feel valued and/or challenged to rise to the next level.

Helpful Tips

As mentioned, adapt the template above in a way that best suits your company culture. Find the right balance of task review and coaching up your people.

Cadence:

You'll need to figure out the best cadence with your team depending on several factors. Often team members meet for an hour a week in the beginning, and then taper off to 30 minutes or meeting every other week depending on the capacity and needs of both parties. Senior leaders can often meet 1 x month as they might be more independent, yet it might also be critical to align with these leaders on more strategy, so the frequency really depends on what the manager deems helpful.

Active Listening:

This is a chance for managers to practice active listening. Be present and eliminate distractions. Ideally you would ask open-ended questions, get a deeper understanding of your direct report's grasp of their responsibilities and have them talk around 70-80% of the time. This is also an opportunity to read body language, trust your intuition, and ask powerful questions that give you a better sense of what's happening in the situation.

Consistency:

Consistency is king. Whatever rhythm you establish for your 1:1s, stay consistent as much as possible and if you must cancel, reschedule as soon as you can. This communicates to your employees that they and what they are doing is valued. Having a rhythm of every other Wednesday at 3pm, for example, allows you and them to get into a flow state faster.

Offer Constructive Feedback:

Growth happens on the border of support and challenge. This is an opportunity to reflect to your employee on where they are hitting the mark and where they are not. Use positive reinforcement to reinforce the behaviors and efforts that you want to see more of. Appreciation and acknowledgment of good work is incredibly impactful. This is also an important time to be direct in what's not working and helping establish what 'good' looks like.

WORKSHEETS

Running Effective 1:1s



Developmental Coaching Questions

Here are some examples of developmental coaching questions that allow deeper engagement and ongoing growth of your team members.

1. What's been one of your top challenges this past week and how have you been approaching it? What's working/not working for you?
2. Given your developmental coaching theme is _____, how has that been showing up the past couple of weeks?
3. If you were in charge, how would you handle this situation?
4. If someone on your team came to you with this same issue, how would you coach them?
5. What ideas do you have about the project or about your team that you haven't yet tried?
6. What's one shift I could make to be even more effective working with you?
7. What's one way that you want to challenge yourself this next week? How will you hold yourself accountable?
8. If you were to stretch yourself (or your team) an additional 10%, what would that look like?
9. What conversations do you need to have that you aren't having? What's getting in the way of you having them? Are there any beliefs about yourself or the other person that you'd have to let go of in order to get the result you're looking for and have this conversation? Let's role-play the important ones.

Meeting Minutes

Meeting Type		Date	
Manager		Time	
Direct Report			
Growth Edge			

Key Points Discussed

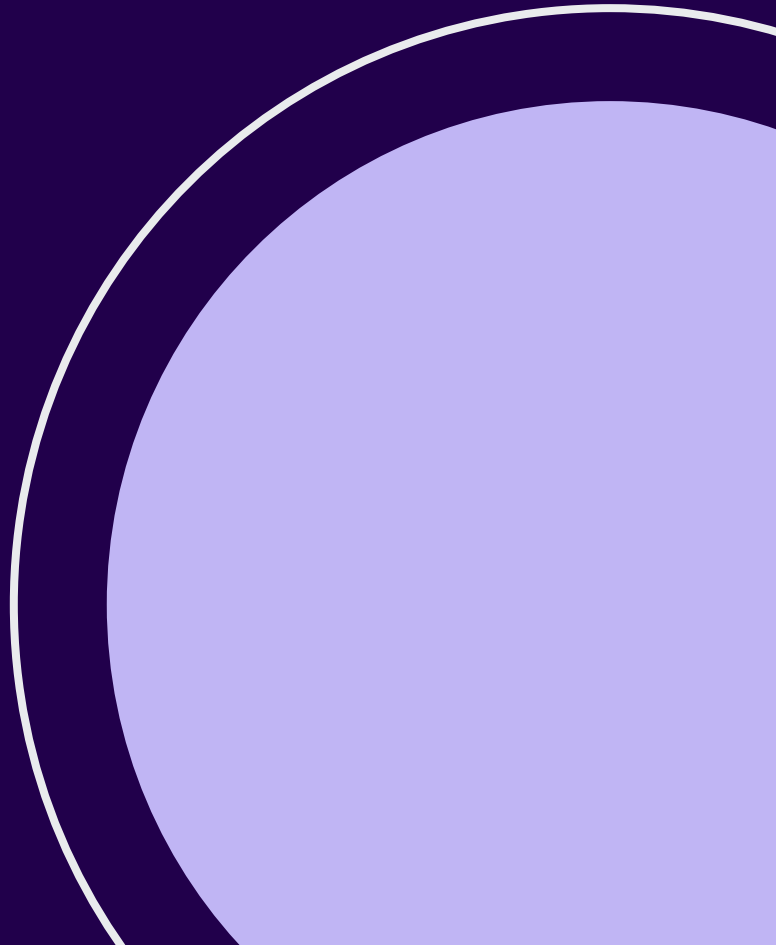
No.	Topic	Highlights

Action Plan

No.	Topic	Highlights

Bonus

Running Effective Meetings



GUIDE

Running Effective Meetings



Running Effective Meetings

Often, being promoted and moving up in management is synonymous with more meetings. In fact, the common expression many managers experience is the popular saying, “death by meeting.”

Meetings should be a source of inspiration, deeper alignment, clarifying expectations, fuel for new ideas, and innovative ways to tackle challenges. Ideally, everyone is present, clear about their role in the meeting, what’s expected of them, and contributing and collaborating to new approaches as well as affirming what’s working.

This is one of the biggest inefficiencies in most companies, as little attention is paid to setting clear intentions and agendas for the meeting, keeping it on-track, facilitating meaningful dialogue and strategy, and concluding with clear next steps that move the business forward.

Usually people stumble into the meeting, are not clear why they are there or what is expected of them in terms of participation, are not sure how to redirect the meeting when conversation goes off-topic, and are simply not present as they are doing other work simultaneously (especially if remote).

The following guidelines are meant to bring more clarity, potency, engagement, and effectiveness to your meetings, all the while aiming to get time back to start doing the work, not just talking about it.

Is a meeting the best solution to accomplish what you are wanting to get done? Is there another structure that saves time and gets the desired outcome accomplished?

Being mindful that people can’t get their work done if they are in meetings all day long.

Meeting Structure

- 1 Setting Context.** What is the purpose of this meeting? Is this clearly stated and communicated to all stakeholders?
 - a.** Is this an all-hands meeting? A vertical-team meeting? A cross-functional meeting? A 1:1?
 - b.** How do you want your group to participate? Is this an update-only meeting? A brainstorming session? A problem-solving session? A quick check-in? An emergency session? The more clear you are on the context and how you want your group to be listening, the more they can participate effectively.
 - c.** Do you have the right people invited to the meeting? This is an opportunity to get really clear on who needs to be there, as the more people you invite, the more expensive the meeting gets. Get clear on who needs to be there and where there are too many redundancies.
- 2 Prepare.** Send a clear agenda ahead of time and any pre-reading material to prepare people for discussion. Whether it's reviewing a report, a deck, a video or handout, set the expectation that they are to come to the meeting prepared to get the most out of your time together.
- 3 Start on Time and End on Time.** When you run a tight ship, people will respect you more. You get what you tolerate. So if you tolerate people showing up late as a pattern, disengaged and not present, not reading the preparation materials, that's what you will encourage more of. By starting and ending on time you are training a new level of crispness that shifts the culture in deeper ways.
- 4 Clarify Meeting Outcomes and Ownership.** What are the 2-3 outcomes that you want to get out of the meeting? Often times managers jump into the content of a meeting before taking a step back and setting a powerful context. Take a moment to get clear on your ideal outcomes that you want to accomplish from today's meeting, which helps cue others on how to best show up and contribute. It's also helpful in the beginning to name who's owning which portions of the meeting or have this identified in the preparation communications.
- 5 Engage and Facilitate.** Use your facilitation skills to ask powerful questions and allow others to contribute and share their updates and ideas. Do your best to not interrupt, shut down, or diminish people in-front of others. How you conduct a meeting is what creates psychological safety, which unlocks innovative thinking. If you roll your eyes, have a condescending tone, or a sarcastic quip, you are signaling that it's not a safe space to really ask questions, offer new ideas, and suggest new approaches. People will start to shut down and simply take orders and eventually disengage.

Meeting Structure

- 6 Stay On-Task and Redirect as necessary.** While it's important to keep an open space for sharing when the meeting requires a deeper dialogue or seeking to understand, there are also boundaries and parameters that are helpful. A skillful meeting facilitator is conducting energy, and knows what to include and what to exclude in a meeting. There might be times when you do need to interrupt or redirect someone if they are off topic, not paying attention, or disengaged. If new items get brought up and your meeting is not the best container for that topic, see what you can put in the parking lot to revisit in another time or setting.
- 7 Clarify Action Items and Accountabilities.** As you move through the agenda items, get clear on any new or remaining action items based on the discussion, and who owns those action items. Get clear on deadlines and suggest any resources or support that the owner of the action item might need to be successful.
- 8 Summary.** Review and summarize the key points of the meeting, who will own which next steps, and schedule when you'll meet next.

***Bonus** – see if you can get time back. One common practice is making sure that the meeting begins and ends on time. And schedule your meetings to end 5 minutes before the hour. This allows some buffer time if your meeting runs a bit over or allows for a quick break or the time it takes to get to the next meeting.

****Double Bonus** – See if you can run your meetings so efficiently that you actually get time back. Can you get your 60-minute meetings to 45 minutes or even 30? Where can you eliminate redundancies? It's a gift when you give people time back, and can motivate you as the facilitator to stay on target. That being said, some strategic or deeper discussions need more time to stretch out and allow for back and forth and shouldn't be curtailed.

