

Developing the Capacity of Organizations, Teams, and Individuals

Tool Box[©]

(Short Version)



Participant Name: _____

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Dedicated to everyone I have had the opportunity to learn from
updated 9/30/10

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Favorite Tools

I. Leadership Development=Personal Development

1. LOVE
2. Emotional Intelligence (EI) Model
3. The “People Business”
4. Vulnerability is a Strength, Vulnerability Aids Connection
5. Finger Pointing
6. Essential Best versus Drama Map
7. Questions are Free
8. “I Don’t Know”
9. Leadership Triangle
10. Quick Check-In and Quick Check-Out
11. Yellow Lights/Caution Signals
12. Leadership Pause (time out) ...Stop, Challenge, Choose
13. Purpose and Values

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I. Leadership Development=Personal Development

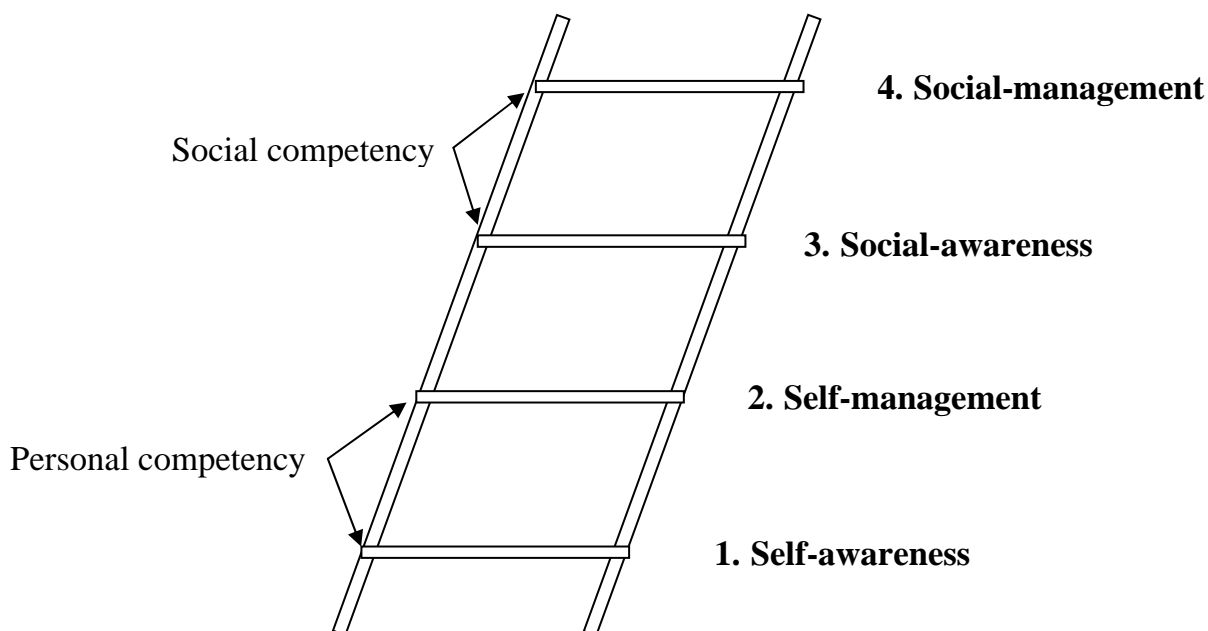
1. LOVE –

People often ask what is the most important ingredient to successful individuals and teams that we have learned, and we have to answer with *love*. People and teams who *love* what they do every day will have an edge over people who treat work as ‘just a job’. Customers can feel it, it is infectious (in a good way) within the workplace. Leaders who have it are more authentic and engagement is higher.

Likewise, teams who love one another, in terms of respect, support, and enjoy working together outperform other teams. Find a job and a team you look forward to getting up to spend each day investing your life with!

2. Emotional Intelligence (EI) Model – source: Daniel Goleman, Emotional Intelligence

"...the capacity for recognizing our own feelings and those of others, for motivating ourselves and for managing emotions effectively in ourselves and others." - Daniel Goleman



3. The “People Business” –

We tell all of the people we work with that no matter what business they are in (banking, medicine, architecture, construction, education, etc.), they are also in the people business. The more we accept, understand, and excel at improving our people skills, the more successful we will become.

4. Vulnerability is a Strength, Vulnerability Aids Connection –

Vulnerability is a leadership strength, not a weakness. The more we open up with other people, the more we invite them to open up with us.

5. Finger Pointing –

Who do most people point to? Others! Every time you point your finger at someone else you give away your power. Every time you point the finger at yourself you give yourself the power. I am responsible...I have the power. Own your Essential Best and your Drama (see tool #7)!



6. Essential Best versus Drama Map – source: Karen Tax, Karen Tax & Associates

Drama Happens...Struggle is optional!



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7. Questions are Free – source: my 6th grade teacher

My 6th grade teacher encouraged me to “keep asking questions, you will always find answers.” My business partner Ron says that they are not free in real life. So create a culture in your organization which stimulates openness, honesty, curiosity, and learning. There are no bad questions.

- Be careful how you answer questions...do you want to encourage more questions or stifle questions?
- My preferred response usually begins with, acknowledgement, “great question!”
- Be prepared and feel okay if you don’t have the answer. “I don’t know” is a good response!
- Be prepared to answer a lot of questions.

8. “I Don’t Know” –

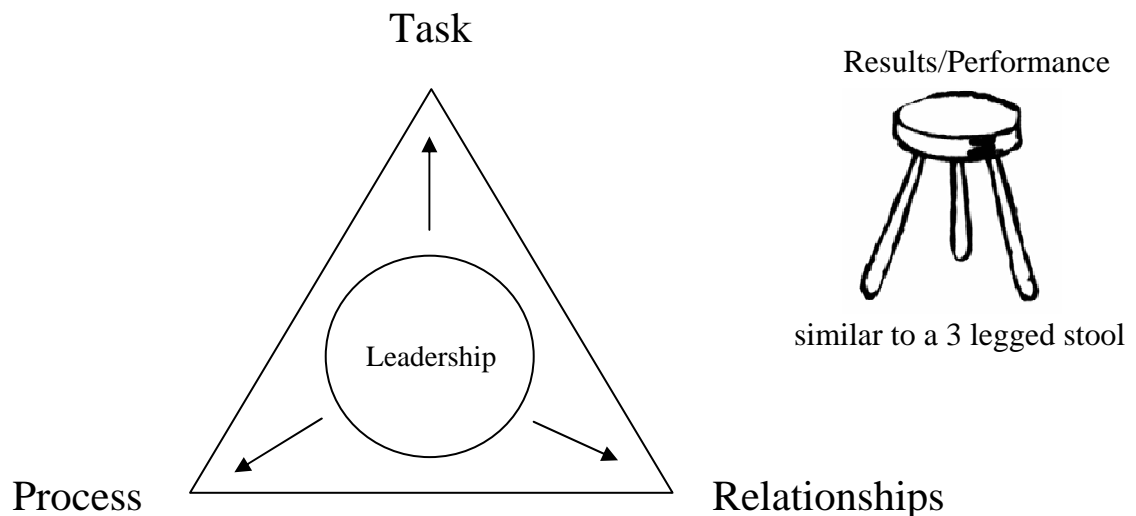
“I don’t know” is vulnerable. It may also be honest and real. We believe it is a strength at times. You can’t know everything. You are also human. What are the values within your organization?

Does your boss want to be lead astray? Is it okay to respond, “I don’t know but I will find out and get back to you.”? Guessing blindly is not good.

If you are talking to people who report to you, being vulnerable and admitting that you don’t know everything is reality. Inquiring for the thoughts of your team can lead to better answers and greater engagement.

9. Leadership Triangle – adapted from Interaction Associates

Highly effective teams need to be aware of and be strategically flexible within the 3 areas of task, process, and relationships to best get the results they want. Where and when you shift is situational.



10. Quick Check-In and Quick Check-Out

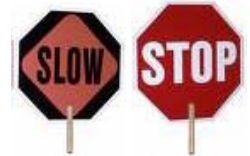
We use this to gather data before and after every meeting. For the **Check-In**, we do a Sounding where everyone has 10-15 seconds to share how they are doing. This builds relationships and gives data for leaders. For the **Check-Out**, we also do a Sounding but ask “how effective was this meeting?” If anyone is less than neutral, we ask why and have the potential to learn and improve.

11. Yellow Lights/Caution Signals – source: Mahan Khalsa, Let's Get Real

What do you do when you see a yellow traffic light?

What you are taught to do is usually the opposite of what you actually choose to do. We are taught to slow down and stop.

We are afraid of mistakes. Ignoring them and hoping they will go away feels easier than dealing with them. This is a fallacy.



If you feel something is not right, most people have a tendency to speed up, as if that will somehow make things well. This will actually cause trouble to arrive faster and be more acute. Instead, try to slow down and stop. Figure out what is wrong, make other choices, and go in a new direction. Be aware of those caution signals your body gives you. Try it.

12. Leadership Pause...time out. A great leadership tool when your team is “off track”

Stop, Challenge, Choose – source: Larry Wilson, Play To Win

Anytime something is said or done (or thought, by you) that makes you feel less than neutral emotionally:

STOP: Don't act or react without thinking! What am I feeling?

CHALLENGE: Why am I feeling this way? Are there any other interpretations of the event? What am I making up?

CHOOSE: What is my optimal response based on my best, long-term interests? Who else will be affected by my decision?

THE BAD NEWS: you are in control and accountable

THE GOOD NEWS: you are in control and accountable

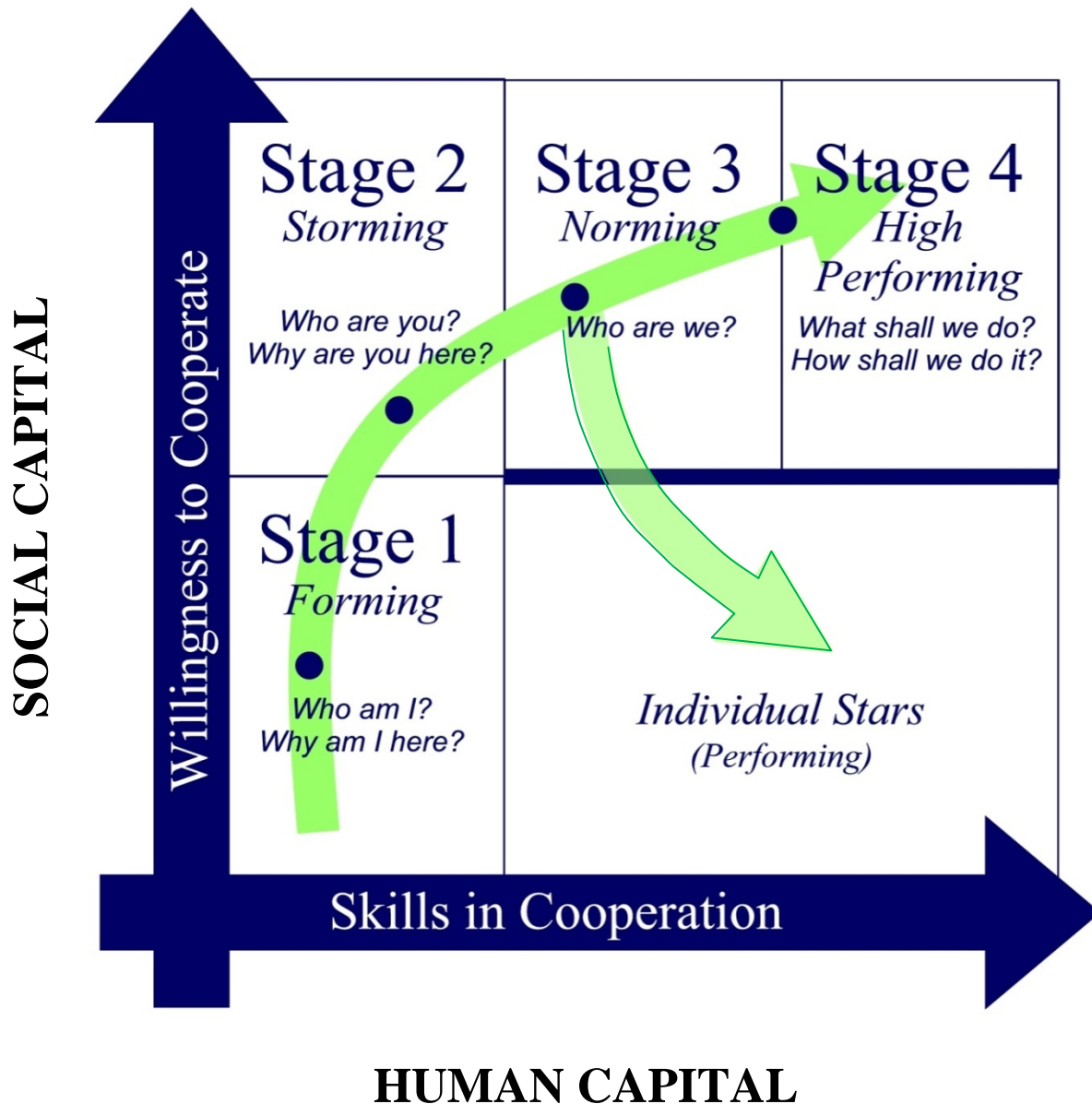
13. Purpose and Values –

Purpose – The WHY behind what we do. A powerful purpose will provide the energy to do anything.

Values – The ‘Navigational Compass’ to help give you direction while on the journey. Getting lost is confusing and costly.

II. Teamwork

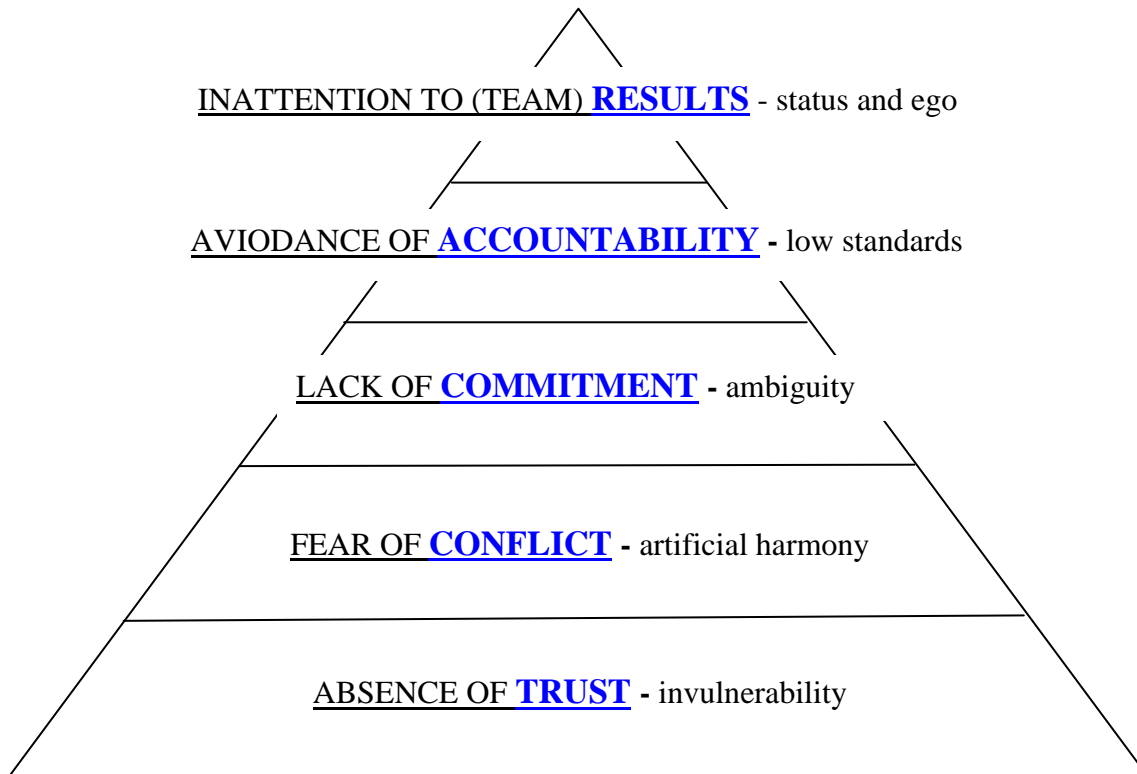
14. **Team Development Model** – sources: adapted from Bruce Tuckman’s Model of Stages of Group Development and Pat MacMillan’s Stages of Team Development, by Ron Price and John Berkley



Human Capital – What people can do.

Social Capital – What people will do.

15. 5 Dysfunctions of a Team – source: Patrick Lencioni, *The 5 Dysfunctions of a Team*



16. How many teams are here? (Question) –

One of our simplest but most powerful tools. Whenever a team is not working together, competing internally, fighting, or behaving with a silo mentality, ask this question. What do we have to do to be 1 team?

17. Does it serve you/the team? (Question) –

We ask this all the time as a litmus test. Do our choices align with our purpose, values, and goals?

18. Team Breath – source: Tom Leahy, Leahy & Associates

A formal request for the team to slow down, savor a breadth of oxygen, bring a change of energy, and return the group to a helpful focus.

19. Team Charter –

Team Charter Questions

Adapt the following elements to your team's situation.

1. Context – What kind of team is this?

- What is your shared purpose? Why are we here?
- What is your vision for the team?
- What are your shared values, norms?
- What are the expected results from your work?



2. Team Dynamics - Dealing with the 5 Dysfunctions of a Team

- How will you build trust within your team?
- How will you deal with conflict?
- How will you make decisions and reach commitment?
- How will you hold each other accountable?
- Who is your first team? Yourself? Your smaller group? The larger organization?

3. Composition and Roles

- What are the strengths of your members?
- What are the growth opportunities/weaknesses of members?
- What gives? In your already filled life... how will you make time for this new team?
- What are the different roles and responsibilities on the team? Who will do what?
- What is the authority structure within and outside of the team?
- What are the boundaries of the team's responsibilities?
- How does this team fit within the larger organizational picture?

4. Resources and Support

- Who are we collaborating with?
- Who are we competing with?
- What resources are available to your team? Think big.

5. Operations (how we operate day to day)

- Meeting logistics
- How often?
- Who brings pizza?



III. Communication

20. **Collective IQ/Creating Voice** – source: Kerry Patterson, *Crucial Conversations*

What percentage of your team truly participates in sharing ideas, conflict, decision making, etc. Most teams operate at less than 25% ‘Collective IQ’. That means that 3 out of 4 people are not adding value. Wow!



The goal is to maximize ‘Collective IQ’ to over 100%. You can do this by:

- creating greater awareness of ‘Collective IQ’
- creating a culture of trust and respect
- reining in the dominators
- asking the quiet people for their ideas
- using soundings
- using consensus
- identifying resources and including them

The benefits are more and better ideas, higher engagement, more trust and respect, and great results.

21. **Ready Circle** – source: Tom Leahy, *Leahy & Associates*

A formal request for team process time and focus that can be initiated by any team member.

- All action stops and the group forms a circle that allows contact between all team members
- Group discusses process or strategy until the “ready circle” is ended by the team

22. **Communication = Delivery + Message** –

A useful tool in breaking up communication into 2 components. It is important to focus on both of these components if you wish to be heard correctly. Often, a poor delivery can make it so that the message is never even heard.

23. **Soundings** – source: Tom Leahy, *Leahy & Associates*

A method of communication where everyone on the team has a VOICE. Usually done in a Ready Circle, each member of the team has a chance to voice their ideas. No one is allowed to disagree, challenge them, or even ask questions while they are sharing or until everyone has been heard from. There sometimes is a time limit for each person to speak. People are allowed to pass.

People may find it difficult to just sit and listen. This is an unpracticed skill which improves with practice. This respectful practice levels the field between the extroverts and the introverts on the team. Be prepared to learn a lot!

24. **Plus/Delta (+/Δ)** – source *Interaction Associates*

A great feedback or debriefing tool. Also a continuous improvement process. Always start with what went well (pluses) and then discuss what you would like to see changed (deltas). This order is important as it will invite people to be more open versus closing down.

Problem Solving

25. 8 Step Problem Solving Model – adapted from: Tom Leahy, Leahy & Associates and Inscape’s Z Process



		Roles
1	ID the Problem <ul style="list-style-type: none"> Define it / S.M.A.R.T. Is everyone on the same page? 	Creative
2	ID Resources <ul style="list-style-type: none"> People and things to work with Think big, think broadly 	
3	Brainstorm	
4	Prioritize Brainstorming <ul style="list-style-type: none"> Rule of Consequences Criteria for priority setting 	Selling
5	Trial and Error <ul style="list-style-type: none"> Plan Test it Rule of 3’s 	Refining
6	Evaluation and Refinement	
7	Implement	Execution
8	Celebrate	All

S.M.A.R.T. Goals

S=Specific
M=Measurable
A=Agreed Upon
R=Realistic
T=Time Bound

26. Rule of Consequences –

A tool to help decide how much planning is necessary up front versus trial and error.

- When consequences are low, minimal planning and trial and error is one of the best strategies. Skip or minimize prioritization! No need to sell, just test as many things as possible and gather data.
- When consequences are high, more planning up front is a great strategy.

27. Big R’s vs. little r’s –

The Big R’s are the rules we are given, the little r’s are the rules we make up...fictitious rules in our own minds. Often we make up more little r’s than there are Big r’s. These little r’s slow us down. Slow down up front and clarify which are which.

28. Ready, Aim, Fire –

A sequence of gaining alignment first on the problem itself, planning, and then testing. Most teams start with *Fire* and then when problems occur, they are forced to go back to *Ready* and *Aim*. This is probably because *Fire* is more fun and seems the most expeditious way. Fun is actually a byproduct of making good choices and realizing results.



29. Test It! Data is Good - source: Tom Leahy, Leahy & Associates

Teams have a tendency to talk more than they actually are willing to take a risk and test ideas. Testing ideas on small scales are a great way to gather real data instead of guessing what will happen. Data is always good in that it gives information. You may not like the information but it is reality. Beta test everything! (source: John Berkley)

30. Thumb Dial Voting – Gather as much data as possible along the way. The Thumb Dial Vote is simple, quick, respectful, invites conversations, and shares information throughout the team. Just ask where people stand using their thumbs to vote...they get to vote anywhere from a thumb up all the way to a thumb down. Pause to inquire from anyone who voted less than neutral (thumb to the side) to understand their thinking. Remember, this is a data gathering tool, not a consensus tool like the New Rule of Thumbs (see next page).



31. Rule of 3's - source: Tom Leahy, Leahy & Associates, from the Marketing Industry

Do not expect perfection on the first try. Any idea worth testing is worth testing 3 times. The first attempt will help members to develop a shared mental model of the idea. The second will allow the team to perform together. The third will demonstrate the reliability of the idea.

32. Occam's razor and K.I.S.S.

"All other things being equal, the simplest solution is the best." – William of Occam, 14th c. English logician

Keep it simple, Stupid! Enough said. – source: the acronym was first coined by Kelly Johnson, lead engineer at the Lockheed Skunk Works

IV. Trust

33. Definition of Trust – source: Blaine Hartford

Trust is a feeling of safety in yourself, induced by how much caring, competency, and commitment you sense another person demonstrates within your relationship.

V. Decision Making

34. **New Rule of Thumb** – source: *Tom Leahy, Leahy & Associates*



I'm 100% on board.



Out of all the choices, not my favorite, but I am willing to support.
Another time, another way, but let's move forward.



No way, I cannot support this choice.



I need more information, I don't understand, I didn't hear, etc.

Remember:

- It's NOT a vote unless every person present votes.
- Those not present for the vote are NOT bound by the vote.

Consensus:

- You have consensus when everyone votes with either a thumb-up or a thumb-to-the-side.

If there are thumbs down:

- Be sure to inquire.
- Is there a shared mental model of what you are voting on?
- What would it take to change it to something you can live with and gives consensus?

VII. Reading List/Recourses

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