



# **Sample Report**

## **DISCflex™ Team Behavior Report**

### **Team Leader: Sample 1**

October 14, 2015

## Team Behavior Report Contents

As you go through the comprehensive Team Behavior Report, you will notice that there are several sections:

1. **Individual Scores (Page 3):** This section shows each Team Member's Name, DISCflex™ Pattern, Bar Graph (containing each factor score), and Pie Chart (showing each factor as a percent to total makeup of an individual). Review the individual scores page anytime you need a quick reference for a team member's behavioral preferences at the micro level.
2. **Team Leader's Strengths (Pages 4-5):** This section is specifically written about the chosen Team Leader to highlight their strengths and how to use these to benefit the team. Use this section to find out how a potential leader prefers to lead, and find out what impact they will have to the team.
3. **Team Leader's Challenges (Pages 6-7):** This section will point to potential challenges the selected team leader might face in leading the team. The **Beware** will caution about potential stressors and provide a **Tip** to work around the problem and find a solution.
4. **Team Overview (Pages 8):** This section gives a quick reference about the team's makeup at the macro level. Use these charts to determine which profiles currently exist on your team and which profiles your team is missing. Cross reference with the Individual Scores chart to see which team members have particular profiles.
5. **Affinity Diagram (Page 9):** Each dot in this graph represents unique scores. Each person has four factor scores therefore, each person has a color coded dot for each of the 4 factors. Clusters of dots close together allow insight on how the team will tend to act in a group setting. Gaps also represent team challenges because they point out deficiencies and missing behavioral skills that the team may need to be successful.
6. **Clusters in the High to Mid-High Range (Pages 10-11):** This section gives insight for the High Clusters of dots, including Tips for each of the 4 factors: Dominance, Influence, Steadiness, and Compliance
7. **Clusters in the Low to Mid-Low Range (Pages 12-13):** This section gives insight for the Low Clusters of dots, including Tips for each of the 4 factors: Dominance, Influence, Steadiness, and Compliance
8. **Team's Governing Behavior (Page 14):** A Team's Governing Behavior is the overall habits and actions that typically materialize in an organization or team. TGB is different from team to team because the individuals that make up the team each have unique behavior patterns that influence the TGB. This section will explain TGB in more detail and explain why it is so important to the success or failure of a company.
9. **Team Leader Responsibility Cheat Sheet (Page 15):** This section outlines the Team Leader's day-to-day responsibilities by using DISC. Use the Cheat Sheets to uncover tips and tactics (based on typical patterns) that may occur as the team leader works through the 9 Fundamental Operational Steps of High Performance Teams.
10. **RA<sup>2</sup> Interface (Page 16):** Fill out the RA<sup>2</sup> Interface to establish who has: Responsibility, Authority, and Accountability for each of the 9 Steps, as well as any other projects your team is charged with accomplishing.

- 11. Cheat Sheets for each of the Nine Fundamental Operational Steps of High Performance Teams (Pages 17-34):** Use these pages as reference guides before team meetings regarding any of the 9 Steps. Example: Review “Articulate Team Vision” and make notes before entering a meeting with your team to “Articulate Your Team’s Vision”.
- 12. Reference Diagrams (Pages 35-36):** Use the "Defining DISC Diagram" and "DISCflex™ Quick Reference Guide" to review each of the four factors.

## Overview of DISCflex™

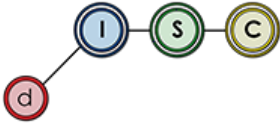
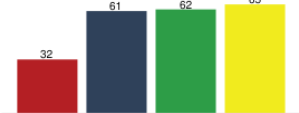
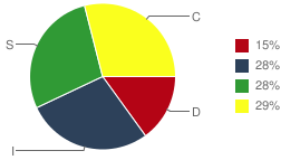
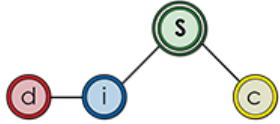
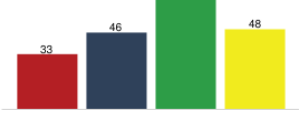
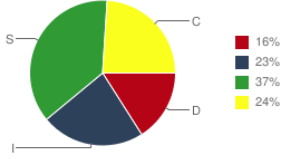
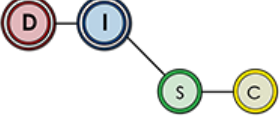
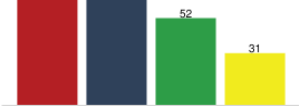
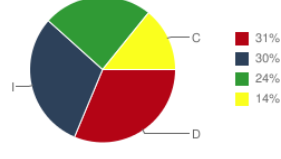
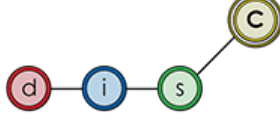
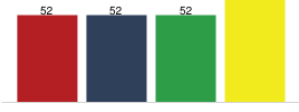
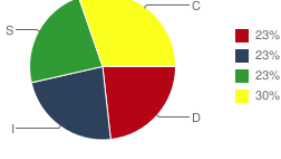
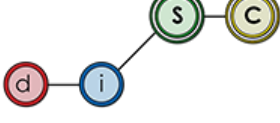
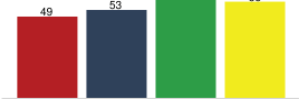
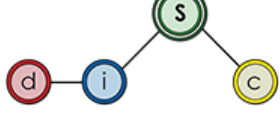

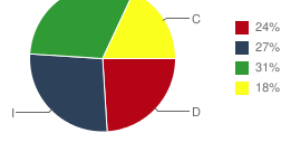
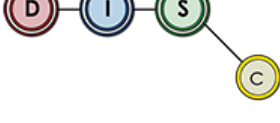

DISCflex™ Reports are one of the best (and most widely used) profiling vehicles to assess a person's overall behavioral tendencies. By completing a DISCflex™ Assessment you reveal the elevations of four DISCflex™ Factors - Dominance, Influence, Steadiness, and Compliance. When the distinctive elevations are charted in the context of a business atmosphere, patterns emerge displaying a comprehensive picture of a person's behavioral tendencies as a business professional.

## Make Notes and Take the Opportunity to Be Introspective

Understanding behavioral preferences will enhance the person's team experience. When a team leader knows the general behavioral tendencies of each individual team member, they can adjust their influencing and communication approach. They can deliver messages that resonate appropriately. The leader will also better understand where the other person is coming from when that person responds. Additionally, the team leader will be aware of how that team member prefers to carry out their responsibilities. This is particularly important if the leader and team member are polar opposites in terms of behavior or if the team member has a typical behavioral tendency that would inhibit their compliance with the team goals that could severely impact team functions and dynamics. As an example, High S types prefer having time to respond thoughtfully prior to making a comment, whereby many High Is like to verbalize their thoughts aloud as they work through them. High Ds speak in shorter, bullet point like sentences, while High C's will ask questions about established rules and guidelines. Expecting all team member to be the same in communication styles isn't reality. Matching and understanding the message to the receiver just makes sense. Team leaders (with the advantage of having the team members' behavior profile at their fingertips) can enhance communication by situationally adjusting their verbiage towards each team member's behavioral pattern.

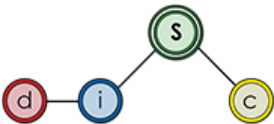
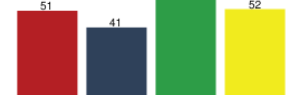
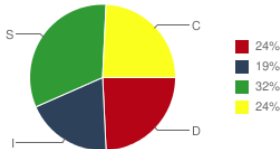
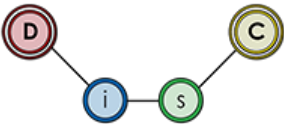
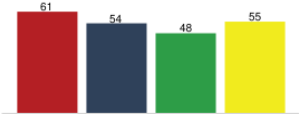
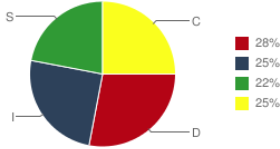
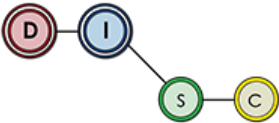
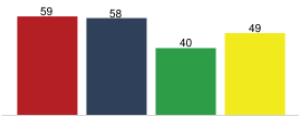
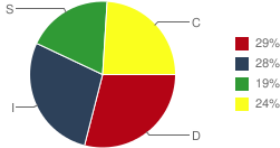
**Disclaimer:** The intent of this report is that it is not to be used for hiring decisions, nor is it appropriate for decisions regarding promotions or any other performance-based inquiries. This report can be used for professional development recommendations in tandem with our patent-pending eLearning, coaching and training solutions, as well as for Blended Learning.

# Individual Scores

Name	Pattern	Bar Graph	Pie Chart
Sample 1			
Sample 4			
Sample 2			
Sample 5			
Sample 6			
Sample 9			
Sample 8			

## Take Notes:

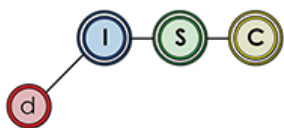
# Individual Scores

Name	Pattern	Bar Graph	Pie Chart
Sample 3			
Sample 7			
Sample 10			

## Take Notes:

## Team Leader Deep Dive - Your Responsibilities

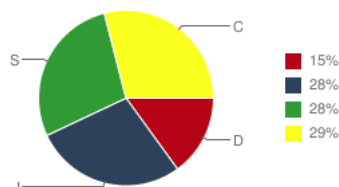
Sample, if the team leader concentrates on mitigating the potential challenges of team operation and development, the team will function better and trust will be dramatically enhanced between team members. The goal is to put together a team that operates with strategic intent, follows a solid plan, executes according to plan, and learns to excel by conducting regular after action reviews. It is the team leader's responsibility to monitor and guide through these steps and phases.



### Team Leader DISCflex™ Pattern

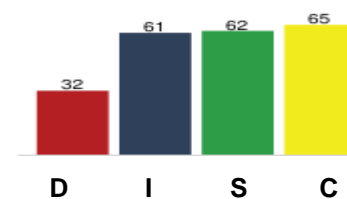
Team Leader: Sample 1

Sample, when people think of you they think of someone who everyone loves because you are thoughtful, kind, patient and considerate. You have a way with words and always know just what to say to make people be the best they can be. Also, teamwork and cooperation are very high on your personal 'value list' because you view interpersonal relationships as important. Sample, your low Dominance Factor means that you are not very likely to be pushy, assertive, or demanding with your teammates. Rather, you will try to influence others through communication and thoughtful persuasion, especially using rational discussion and logical reasoning. If you've spent any time honing your influencing skills, you are most likely very persuasive because you are social, thoughtful, and know the rules of engagement. You are also savvy about how people in your social and professional life expect you to behave. Building strong relationships with others is essential to you.



Looking at the big picture you are able to see your behavioral style is governed most by your Influence, Steadiness, and Compliance Factors. The pie chart indicates a clearer overall picture - a snapshot - of all four factors in your behavioral pattern. When you compare and contrast the bar versus pie chart to your coworkers you can gauge your behavioral style's strengths and weaknesses enabling you to see what things

separate your actions from others. You can use this to recognize how to incorporate behaviors in the different situations you come across in life.



# Team Leader's Strengths



One of your organizational strengths is that you really work well on teams or in group settings. You relate easily with others because you are friendly, approachable, pleasant, and outgoing. In a team setting, you are the peacemaker. You are fair-minded and will try hard to make sure everyone is delighted to be working on your team and will listen attentively and respectfully to all team members.

**Beware:** Sample, you can't please everyone, you already know this. So choose when to monitor your natural people-pleasing tendencies so that people don't take advantage of your good nature or that you don't waste too much time on trying to make everyone happy.

As we stated, you are thoughtful about relationships; and this occurs at an extremely deep level. The combination of the ISC Factors allows for a rational view of how to influence others in a caring and thoughtful manner. In most situations, Sample, it allows you to be very aware of how others are responding to your ideas. Additionally, your higher Steadiness Factor gives you a much higher 'active listening' skill than most people. Plus, your High S grants you the patience necessary for dealing with group matters.



## Take Notes:

# Team Leader's Challenges



Sample, you will most likely run into some specific challenges and roadblocks as you lead your team. You are not unique in this. Every behavior pattern has its own set of challenges. Preparing for these roadblocks will help any team leader overcome them more easily. Let's have a look at some of the roadblocks you may encounter.

**Beware:** You do not like to push people. This can be a problem if people sense this in you because they might think that slipping or changing deadlines will be ok with you. They might also think that because they've brought you a valid reason for changing the dates (because you are so careful and thoughtful), that you will agree. If you allow this to occur and change timelines too often this might cause a bit of angst and stress with you and those you lead. This is a problem when leading people who need to get things done quickly (high Ds) and/or on time as promised (high C individuals), because they might start to disrespect you as their leader.

**Tip:** Please be cognizant of how often you are asked to change timelines and ONLY make changes that are absolutely necessary when it comes to granting extensions on deadlines.

Sample, when you are in the team's leadership role, you will always try to influence others through communication and thoughtful persuasion.

**Beware:** Unfortunately, your lower Dominance Factor ranking also means that you will not push when conflict arises. You will tend to back off when temperatures rise, preferring to let things settle down first. Once settled, you will try to remind people to let cooler heads prevail and influence through thoughtfulness. Sometimes this type of reconciliation comes too late because stronger personalities, like those with much more Elevated Dominance Factors, win out. When this happens, you are not very likely to be viewed as an assertive leader.

**Tip:** Step up a bit sooner than you feel comfortable with and assert your standing as the peacemaker from the outset. Make certain that people understand that you run a calm, respectful team and that you expect them to act accordingly. Whenever a dominant person goes against this tenet, call them out immediately and have a private word. In this way, you'll be ahead of the potential problem.

**Beware:** Over time, if a more dominant person consistently overrides your views, there will be two potential effects: It might erode your confidence in your abilities to move a team along in a logical fashion. You might become frustrated with constantly having to reiterate a logical and rational path forward.

Sample, because of your lower Dominance score you tend not to like an overly assertive leadership role, so this will cause you stress until you take the issue on. 2. If you are constantly thwarted by a team member with elevated Dominance characteristics, you may choose to disengage or in extreme circumstances, leave the team altogether rather than constantly battling with the Elevated Dominance personality. This solves nothing! And it will damage your reputation as a leader. How will you look in the mirror if you do this? With your thoughtful nature, you will replay 'what I should have done...' many times. This option will not give you peace of mind. 3. And finally, if your Steadiness Factor is much greater than your Dominance Factor, your patience will ensure that you take adequate time to sort through the situation. You will be prudent in determining corrective actions, including the tough conversations you will have to have with this individual. And, your profile suggests that you will make sure that a satisfactory conclusion is reached. Not doing so would cause you more stress than not dealing effectively with the issue at all.



# Team Leader's Challenges



**Tip:** This third (much preferable) option means you might have to dial up your sense of urgency and find a way to deal with this head on, but in a way you feel comfortable. Because of your innate sense of fairness and your need for peacemaking, you'll have a strong desire to make sure your teammates stay within the organization's rules, culture, and norms.

To keep your motivation keen, and to be content and happy, you work best in a highly cooperative and collaborative team environment. Sample, you are motivated most by furthering personal interests that are in line with the team's goals. You'll work hard to make sure you maintain good relationships with others who share team-oriented interests and those who think deeply about issues facing your team. Fairness to all is a huge personal driver. You do not appreciate others being held to different standards and will not work as effectively on any team if you find out this is the case. In fact, you will come out of your shell and be the voice of the underdog any time you think people are being taken advantage of. But, again because of the lower D in your profile, you'll probably do this in private to someone you know who can change what is happening. They will believe and trust you because of who you are and what you stand for in the organization.

## Potential Challenges

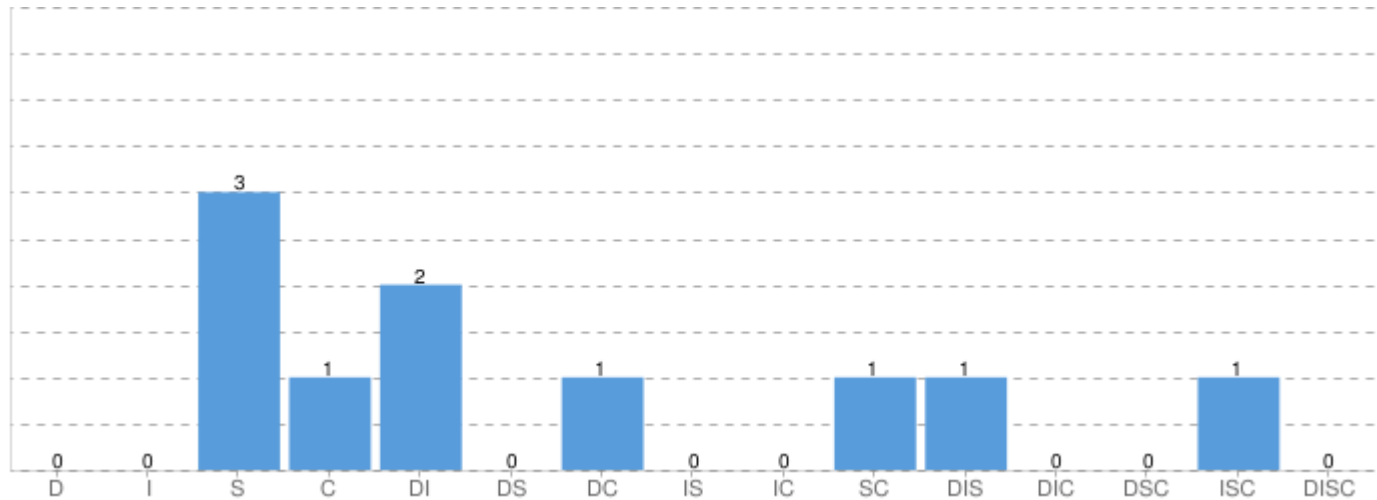
Motivation  
Perseverance  
Efficiency  
Independence

## Take Notes:

## Team Breakdown

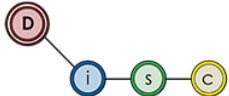
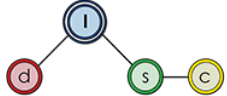
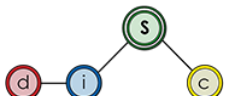
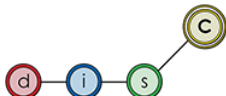
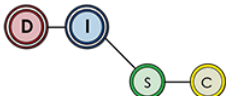
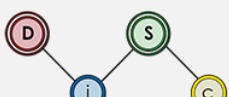
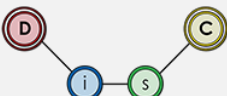
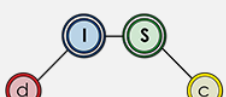
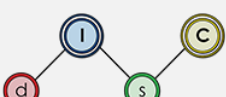
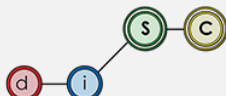
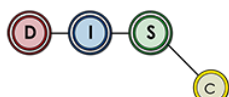
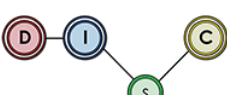

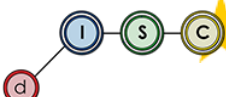

### DISCflex Team Patterns

Now, let's take a look at the overall makeup of the team. A thorough understanding of a team's **Team Governing Behavior (TGB)** must include a view of behavior at the macro and micro levels. The chart shows the number of team members that have each of the 15 DISCflex™ Patterns.



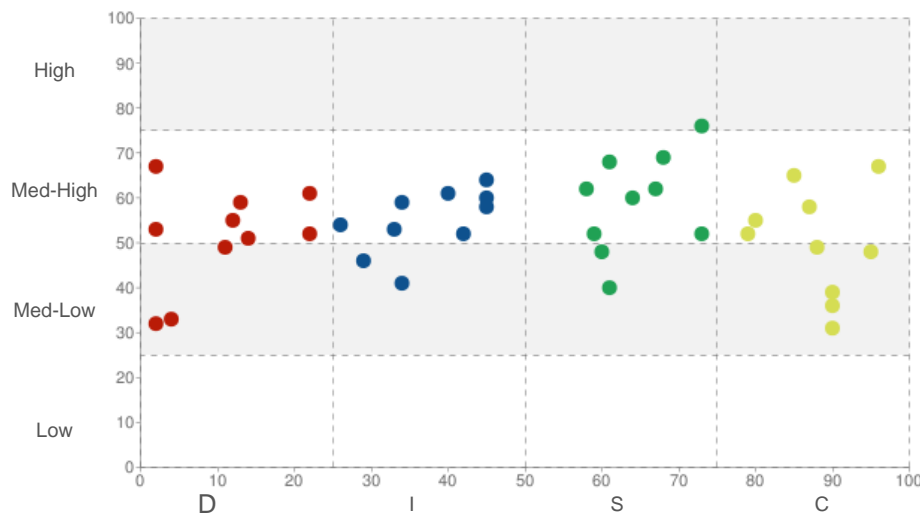
Results will be dependent on organization selected for team report, team leader, and the number of people.

In this chart, we look at behavioral groupings. By looking at the chart, you can see the star indicates the team leader's patterns. Below we see how many members have each of the 15 DISCflex™ Patterns on the left, with what percent of the team shares this pattern on the right. (This is displayed as "How Many Members" / "% of the Team").

		 <b>3 / 30%</b>	 <b>1 / 10%</b>	 <b>2 / 20%</b>
	 <b>1 / 10%</b>			 <b>1 / 10%</b>
 <b>1 / 10%</b>			 <b>1 / 10%</b>	

Results will be dependent on organization selected for team report, team leader, and the number of people.

# Affinity Diagram



## Independent Factor Elevations

This diagram shows the team's **Team Governing Behavior (TGB)** by giving a precise picture of each exact independent factor level for every team member. This provides an excellent snapshot at the micro and macro level. Each dot represents one person's factor. Remember that in each person's behavior pattern, every person has four independent DISC factor dots – one for each color: **RED** for **Dominance**, **BLUE** for **Influence**, **GREEN** for **Steadiness**, **YELLOW** for **Compliance**. Clustered dots

and sparsely populated areas will help you identify specific DISC strengths and curtail potential weaknesses within your team.

*In the segments, we reference a simple way to relate the four DISC factors to their roles in a team member's behavior:*

**Dominance (Do-ers)** – These individuals are action-oriented and prefer not to spend much time planning.

**Influence (Communicators)** – These individuals are naturally social, making them great communicators.

**Steadiness (Thinkers)** – These individuals think deeply and are geared toward meaningful communication.

**Compliance (Correctors)** – These individuals tend to notice discrepancies more often than others.



## Take Notes:

# Clusters in the High to Mid-High Range

This segment focuses on team behaviors that will typically be observed when clusters exist. Clusters of factors provide insight on how to deal with a team's governing behavior. This section provides tips to work with, rather than against the governing factors displayed. People often become stressed when they are asked to suppress (dial down) their natural behavioral tendencies. When a team has a cluster of individuals with the same high or medium-high levels, the team will be governed by those behaviors.

## Dominance

High Ds focus on the end goal, forward-looking, assertive, and competitive. Team members may resort to “my way or the highway” attitudes. High Ds are driven by getting results and prefer action to planning. High D's respect people who are results oriented, direct, independent, and decisive. They are often blunt and hard-hitting; this means they don't like people who over-analyze, drag their feet, who they perceive as weak, or don't make decisions quickly. They create a high sense of urgency (even when none is warranted), and will use their high energy levels to motivate/drive others. High D's are ‘permission takers’, goal-oriented and have a need to control. This means they will cause tension and stress. Signs of this might be high turnover or employee dissatisfaction. In fact, they may make those with lower Ds feel overpowered. For more information on how to manage ‘permission takers’ please access the white paper in your RA² Interface eLearning course.

- Facilitate open communication that has time limits.
- Be clear, specific, brief and to the point.
- Define boundaries clearly. High Ds like to overstep! They are also blunt, so they may need to be reminded to be kind.
- Stick to the business at hand. High Ds have a tendency to ask for things they have been thinking of at seemingly random moments.
- Be prepared with data to support any areas where conflict may arise.
- High Ds are results oriented. Thank them for getting the results for the team at every opportunity. You will be rewarded with more of the same! Just remember, High Ds don't give out praise very often.

## Influence

High Is love collaboration and are passionate and optimistic about what they believe in. They typically have good social skills and like team meetings and activities. Their love for these tends to frustrate people with Low I's. High Is can be known as ‘interrupters’ of meetings, people, goals, schedules, and anything else - with impunity! High I team members may cause meetings to run longer than scheduled due to lengthy discussions because they seek input from others, they habitually change course and dislike concrete plans. They also dislike too many rules, plans, over-analysis, and people who are blunt or insensitive. If allowed, a ‘last in the door’ mentality may govern their direction, which can be extremely frustrating to others.



- Set an agenda and stick to it.
- Schedule another meeting to continue discussions on issues that have not been resolved.
- Set up a ‘Parking Lot’ in the meeting room where things that come up that may be important but aren't on the agenda today can be placed. This will satisfy most High Is. (For more information on “Parking Lot” see the eLearning in the facilitation course under “Brainstorming”.)
- Gently remind higher I's about the need to hold back their thoughts until others have a chance to speak.
- Deliver any message in an open, friendly manner.
- Put any requests in writing and request confirmation of the high Is understanding of deliverables.
- Be prepared to have a longer discussion than you might like. Respond with a smile and ask questions to draw their opinions or comments.

## Steadiness

High Ss are typically loyal and team-focused. They're stable and love predictability. They are humble about their accomplishments, and in nature. The hallmark of a team with a high cluster of Ss is that they are kind and respectful. If they push to stay in the strategy or planning phases for too long, they tend to be stubborn. They don't like people who are aggressive, pushy, or who talk too much. They also don't like sudden change and thoughtlessness. If you have a cluster of High Ss, it is a good idea for the team leader to set aside adequate time to think things through methodically with the team as a whole, because that is what a large grouping of your team prefer. Also, when dealing with a High S Factor cluster, speaking in SMART goal terminology to get things accomplished is vital. If you, as the leader, fail to do this the team may brainstorm forever, never getting to the moment when they launch into action. Failing to provide the deadline, specifics, and measurements will result in delays and frustration for the entire team and those around them.

- First create a rough timeline that shows when the team will transition from the planning phase to the action phase. Then lock down the SMART goals, and benchmark consistently for progress.
- Give High Ss time to think things through, but lock down deadlines for EVERYTHING. They have great ideas but are often reluctant to launch until everything is perfect.
- High Ss need to know 'Why'. Begin with a personal comment - break the ice. Present your case thoughtfully, with more detail than you might for others.
- If you want their opinion, ASK, preferable in a thought-provoking or inquisitive manner. Never rush your High Ss into responding without time for thought. Do not force them to make quick or spontaneous decisions.
- Never interrupt, they might shut down communication.

## Compliance

A team with a high percentage of Cs likes to keep budgets and time-lines intact. They are dependable, hard-working and accurate with a high attention to detail. They dislike inaccuracies and illogical decision making. They tend to be prompt and dislike meetings that do not start and end on schedule. Team members may have difficulty working through any rules or regulations changes. When High Cs confront current policies, they may get in the way of team goals, and become unnecessarily stressed. High Cs are 'Permission Askers', conformity and observance of policies and procedures is important to them. Even when they know the rules might be slowing down team progress, they are reluctant to change the status quo. For more information on how to manage 'Permission Askers' please access the white paper in your RA² Interface eLearning course.

- They are precise, but can be overly-literal, so be sure to spell out expectations and deliverables in great detail.
- They tend to be perfectionists, so a team leader must define standards otherwise time and resources can be wasted.
- Concentrate on why the rule is there and why it needs to be updated. If it cannot be changed, ask for an extension on facts and figures, alternatives, abstractions.
- Let team members know to come to you if they run into the types of roadblocks that get in the way of any progress.
- Explain that process improvements require looking objectively at all the policies with a view to making prudent, timely changes. Ask them to examine which rules could use 'an upgrade'. In this regard, they will be more than willing to bring up what should be altered or streamlined for the team to carry out its goals in a more efficient manner.



# Clusters in the Low to Mid-Low Range

Low clusters signify behaviors that are less dominant in a team. People often become stressed when they are asked to elevate (dial up) factors that are low in their behavioral makeup. This segment provides tips to lessen stress or mitigate any effects caused by low clusters.

## Dominance

Team members with Low Ds may hesitate to take timely action steps. A team with a group of Low Ds might seem like you are always pushing, motivating, or frustrated that deadlines slip and timelines constantly change. People with Low D scores are naturally less demanding, but they also don't have a natural high sense of urgency. Many are unwilling to accept new challenges without firm direction from the leader.



- Confirm the plan of action with these team members personally, and answer any questions they have.
- Go over contingency planning. Low Ds become stressed if things don't go as planned.
- Provide assurances and proof that emergency planning has been done and that you have considered the likelihood of success and failure and can address the benefits and consequences of both equally well.
- Low Ds typically don't like 'firefighting' mode and prefer to know that when things go wrong the team and its leader will not launch without adequate thought, discussion, and/or planning.

## Influence

Team members with Low Is are drained by interacting with others. They may not have honed their ability to communicate which can result in ineffective and/or sporadic communication. When a cluster of Low Is are present in a team, the team leader must stress the importance of adequate and respectful communication. Low Is will not like to bring up problems because it requires communication – until they have to do so. They tend not to like long meetings or brainstorming sessions either.

- Schedule regular meetings to make sure all team members are on the same page.
- Try not to draw out Low Is in public. Many have a solid fear of speaking in public. Sidebars during breaks, allowing them to pass notes or write on an easel or whiteboard will go a long way in getting the Low Is ideas out in a non-threatening way.
- Remember that as trust builds, many Low Is will feel comfortable enough to share openly with the team, but they'll probably never be entirely comfortable doing so.

## Steadiness

Team members with Low Ss may try to rush into action before the strategy is fully thought out or plans are complete. Sitting down and putting pen to paper for long periods of time drives them to distraction, which causes stress! Additionally, during the decision making process, Low Ss clusters might influence the team to take shortcuts on weighing options or in analyzing cost/benefit solutions. An important characteristic to monitor in a Low S cluster is kindness. They tend to be a bit less empathetic of their teammates than a leader might like.

- Stress how important it is to have a solid plan that all members agree to.
- Remind the Low Ss that more stress will ensue after the fact because the results of a lack of forethought and planning will catch up to them.
- Decision making skills are important so make sure that you go over the basic processes of decision making with your Low S folks.
- Probe to uncover gaps in strategy or plans and uncover areas where the Low S types might not have thought things through adequately. If you do this on a consistent basis, you will avoid fallout during the execution phases of any team project.

## Compliance

Team members with Low Cs may cut corners, be reluctant to report metrics in a timely fashion, willfully ignore rules or policies, or overlook seemingly small details that may cause a large problem. Plus, a Low Compliance cluster (group) might not work too cooperatively together; each wanting to do things their way. In addition, Low C team members like to set their own standards, and go against standards that are imposed upon them. This might present a special type of accountability monitoring by the team leader.

- Make sure that all expectations regarding compliance are communicated with all group members. Be particularly vigilant about checking up on your low Cs in this regard.
- Pair low Cs with Medium High to High Cs. They might resist this but will come to like the check and balance.
- Have the high Cs take over the compliance, reporting and policy functions wherever possible. Why battle in an area where the C is so low that it cannot be adjusted without significant effort and stress to all?







## ***Vigorous Debate About Team Behavior***

If you want to provoke a vigorous debate, Sample, start a conversation on a team's predominant behavior patterns. If you really want to get the conversation revved up, kick it off with comments about why the team is operating like they are! A ***Team's Governing Behavior (TGB) is reflected by the overall behavioral traits that a team displays.*** You may make judgment calls on performance and behavior of the team as a whole and of individual team members.

### ***What precisely is TGB and why is it so important to understand?***

Team Governing Behavior is based on an underlying set of shared assumptions, values, and beliefs, which govern how people typically behave in an organization or team. It is sometimes referred to as the climate or culture of an organization or team. The Team's Governing Behavior (TGB) *reflects the habits and actions that typically materialize in an organization or team.* By examining TGB with respect to a team and their leadership, you can gauge the team's strengths and weaknesses. TGB has a strong influence on any team and dictates how team members will interact with each other, address tasks at hand, and determine the tempo at which the team is comfortable operating.

While there is universal agreement that (a) governing behaviors on a team exist, and (b) that those predominant behaviors play a crucial role in shaping overall performance in teams, there was probably little consensus on exactly how it influenced a team's overall operation, motivation, and goal achievement. Most important, if you were the team leader: ***What could you specifically and effectively do about it?*** In particular, how do you capitalize on your team's strengths and mitigate behavioral weaknesses? This report addresses precisely these questions we've posed and others that are equally important. The report doesn't only tell you what the team members might do based on their behavior patterns, it is so much more than that! The report is highly specific to the team leader's role and suggests corrective steps for that specific leader to make. These take the form of tips which allow you, as the leader, to formulate strategies to get ahead of potential challenges.

### **Assessing a Team's Governing Behavior (TGB)**

The Team Behavior Report is designed to provide the teams leader and members with vital information about the team's predominant behavior patterns. As the leader, Sample, you cannot hope to understand the team's governing behavior without a reasonable overview based on both the individuals' behaviors and the overall makeup of the team. TGB is an important aspect of team dynamics. TGB has connections to other key elements of the team's performance, too. These include: trust issues, communication flow, planning, execution, control factors, team development, and personal motivation.





# Responsibility Cheatsheet Overview

In this section of the report, each topic area refers to the Nine Fundamental Operational Steps of High Performance Teams. Each segment indicates the question(s) that should be answered during each step, and also which factors will be most useful to 'dial up' during that step. We encourage you as the team leader to remind team members to 'dial up' the factors that are most beneficial and 'dial down' the ones that could potentially curtail efficiency in current team activities. Then when this step is completed, check that what you have come up with works for the other factors. For example, the first step is "Articulate the Team Vision". Individuals with a high Steadiness Factor have strengths that significantly complement this step, so we advise that you encourage these individuals to contribute during this step. The other factors should be less dominant. The segment provides tips on potential challenges that may occur if the appropriate behaviors are not in play. The appropriate phases of team development are also referenced for the team leader's benefit.

**Team Leader Responsibilities** Sample, if the team leader concentrates on mitigating the potential challenges of team operation and development, the team will function better and trust will be dramatically enhanced between team members. The goal is to put together a team that operates with strategic intent, follows a solid plan, executes according to plan, and learns to excel by conducting regular after action reviews. It is the team leader's responsibility to monitor and guide through these steps and phases.

**Next you have to understand the Nine Fundamental Operational Steps of High Performance Teams.** When reviewing the next segments of this report, you, as the team leader will follow nine fundamental operational steps in order to build a high performance team.



***When you look at the overall behavior of your team, some of the questions that will promote discussion are:***

- Are they a high energy team?
- Are they a team that values relationships and inclusiveness?
- Do they appear to be a team that prefers to be precise?
- Do they follow the rules?
- Is loyalty held in high regard?
- What behaviors rule over their team decision making? Or over how team members interact with others?
- Which overriding behaviors emerge during stress?
  - Does the team as a unit get more or less relationship oriented, pulling together quickly into huddles to solve problems?
  - Do they go into firefighting mode, or 'fire, ready aim' reactionary mode?
- During brainstorming sessions, or when the team executes their responsibilities, what typically happens in team meetings?
  - Are the members constantly interrupting each other? Or do they respectfully and thoughtfully wait for others to finish?
  - Do they build on the ideas of others thoughtfully and innovatively?
  - Do they go with the first option that feels good, not waiting to waste any further time in a meeting?
- Do they hang out with each other and build friendships? Or does the team function more like a group of individuals who prefer to go about their individual responsibilities without too much interaction than a closely-knit group?

# RA2 Interface Chart

RA <sup>2</sup> Interface								
	<u>Responsibility</u>	<u>Responsible Party</u>	<u>Person Accountable to</u>	<u>Accountability</u>	<u>Authority Parameters</u>	<u>Due Date</u>	<u>Project Lead</u>	<u>Communicate &amp; Reform</u>
1.	Articulate the Team Vision							
2.	Move from Imperatives (Have to's) to SMART Goals							
3.	Conduct a Situational Analysis – SWOT Analysis							
4.	Derive the Strategy							
5.	Develop the Action Plan							
6.	Communicate the Action Plan							
7.	Execute the Plan							
8.	Control & Revise the Plan							
9.	Conduct an After Action Review & Evaluate Lessons Learned							

## ARTICULATE TEAM VISION

- Why are we together?
- What are we charged with doing?



The first step is important because everyone needs to be on the same page. The team leader's responsibility is to ensure that the team's vision/mission statements are current and fundamentally agree with the organization's current (and future) purpose. and that these align with how people perform their jobs. Accomplish this by having the team take part in a debate about the purpose of the team. This will help get everyone through the 'forming stage' of team development.

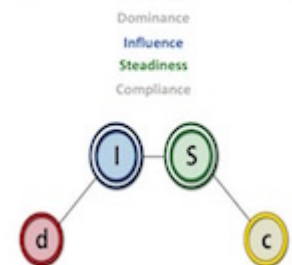
A team leader may have the tendency to make executive (also called authoritative) decisions. During this step, it is imperative that the leader get input from all of team members so that they share 'one vision' (this is where the high I is important).

**Tip:** Use the Decision Making Matrix as a counterbalance to this potentially destructive tendency.

## Dial Up/Dial Down

Inclusion (High I) and Thoughtfulness (High S) are the goals. These are High I and High S tendencies – dial them up! Dial down the D to ensure that the team expends an adequate amount of time thinking. Keep the I Factor to a mid-high level, so that you don't ramble or overly focus on people over results. Vision should have a 'Blue Sky' – few limitations. Dial down the C to an appropriate level.

## Useful Factors



## Dominance (Do-ers)

High D's may resort to extreme lobbying or influencing tactics to get their way.

- Insist on 'airtime' for all team members as you formulate or discuss the team vision.
- Discuss the need for diversity of thought.
- Make sure people understand that it is equally important to lead and follow on a team.

## Influence (Communicators)

High I's may verbalize thoughts prior to getting clarity.

- While words for the vision are important, it takes a great deal of thoughtfulness to get the amount of communication (number of words that High Is typically prefer) down to the simplest statements. Brevity is the goal so forcing that I down and bringing up the S is important.
- High Is often find it stressful to think before talking, preferring to talk things out. This might be counterproductive to putting a concise vision together. Only put on the board relevant words!

## Steadiness (Thinkers)

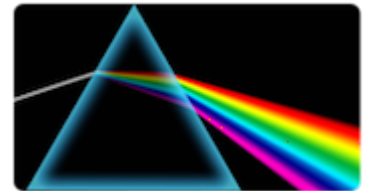
High S's natural tendency might be to be a bit more reserved than others on the team.

- Let the thoughtfulness shine through!
- Dial up your D and put your words out for examination and discussion!
- Explain your thinking. Tell your teammates what is in your head: the pros and the cons for certain statements and direction.

## Compliance (Correctors)

High C's often prefer getting direction rather than leading the area they are responsible for on the team.

- Stipulate that the High C's get clear on your expectations of their level of authority. Often, High C's with authority squander it by acting as if it's not part of their role.
- As the team leader, demand that everyone is given authority to make decisions, move projects forward, give feedback, and resolve personnel problems.
- Get very clear in your own head (and with your own boss, if necessary) about precisely what authority you have in enforcing this critical role.
- Speak and act with the confidence of your position and stress that your team do the same when you delegate authority to them.



## GOAL SETTING

- Move from imperatives to goals
- What do we have to accomplish?
- How long do we have?



Setting goals based on the team's mission and "Have to Do" is the fundamental underpinnings of strategic intent. Appropriate deployment insists that the linkages of accountability remain intact as the team works through its goal statements. Implementation plans must be aligned with Responsibility, Accountability and Authority Factors (RA<sup>2</sup> Interface documents).

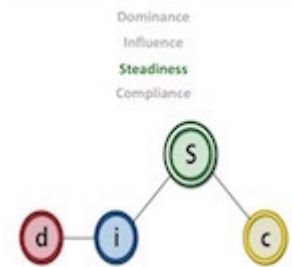
## Dial Up/Dial Down

Thoroughness and accuracy are the goals. These are High S tendencies – dial them up! Dial down the D to ensure that the team expends an adequate amount of effort shaping SMART goals. Dial down the I Factor so that you focus on tasking people and stretching their limits or testing their skills. Dial down the C to an appropriate level so that you leave plenty of room for innovation.

Most people don't like writing down goals correctly – with accountability measurements. Many team leaders have a preference of taking action instead of thinking about and detailing the correct steps for those actions.

**Tip:** Create your goals using the SMART format: Specific, Measurable, Attainable, Relevant, Time-sensitive.

## Useful Factors



## Dominance (Do-ers)

High D's like to focus on the result "Have to Do" but usually don't like to get locked down by SMART goals.

- Set aside time for a goal setting session. Typically no more than an hour to cover "Have to Do" in a SMART format.
- Insist that your High D's put ample thoughtfulness into this time.
- Clarify your requirement that all team members adhere to fleshing out and ratifying goals prior to expending resources.

## Influence (Communicators)

High I's may use too many words and dwell in conceptual thinking that might muddy the waters of goal setting.

- Start goals with the words "We need to.... By (timeline....) So that we will assure that we ....."
- Assure High Is that their other concerns (that don't have much to do with what you're currently talking about) will be addressed, but perhaps not exactly when they bring them up.
- Go down the list of "Have to Do", and talk through SMART goals for each one with a set timeframe.



## Steadiness (Thinkers)

High S's like to strategize and plan. They may spend too long in the "Have to Do" Goal phase. High Ss like to be thoughtful and do not like mistakes. The old adage "Measure three times, cut once" sits well with them.

- Deep thinking is great but timelines have to be adhered to for things to get accomplished. Assure High Ss that you will monitor and track progress so that anything you haven't considered can be seamlessly folded into the living strategy documents.
- Set metrics early on, and have the High Ss in your team monitor these. This will go a long way in making them feel confident.

## Compliance (Correctors)



High C team members will abide by policies and rules. This can limit innovation or creative ways to accomplish the "Have to Do" through goal setting. They typically like to do things the way they have done them before and getting them to change methods can be somewhat challenging for a team leader.

- Ask them: If we wanted to do something different, but within our methodology, how could we accomplish that? You never know, your High Cs might come up with an innovative yet compliant way to get the job done where you won't have to have an exception granted.





## Conduct a Situational Analysis

- Where are we today?
- What roadblocks can we expect?
- What strengths and weaknesses do we have?
- How do we stack up against competitors or similar teams?

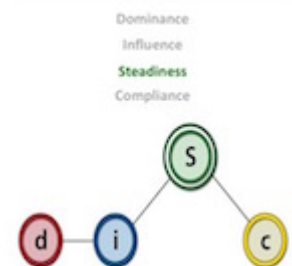
By conducting a SWOT analysis, the team captures the strengths, weaknesses, opportunities, and threats fundamental to the team's operations. The SWOT framework focuses on prioritizing activities and resources into areas where the team is strong and where the greatest opportunities exist. It also serves as a vehicle for steering the team toward actions aligned most with strengths and a view of capitalizing on opportunities. At the same time it has a plan that mitigates risk based on current and future threats.

## Dial Up/Dial Down

Contemplation and reflection are the goals. These are High S tendencies – dial them up! Dial down the D to ensure that the team looks at the situation realistically and thoroughly. Dial down the I Factor so that people focus precisely on the task at hand and curtail the tendency to go down 'ratholes'. Reserve a 'parking lot' to avoid this. Dial down the C to an appropriate level so that you leave plenty of room for different ways of thinking and an open mind to change.

Many team members may think that because situations change so quickly (and if they are usually adept at handling changes in their stride) that they don't have to go through the formality of Situational Analysis including Threat Mitigation and Opportunity Capture Analysis Models. This is a grave mistake when a leader allows this to occur on a team. Not doing so affects your standing as a leader. This happens not when things go right, but when things go wrong, as they will at one time or another.

## Useful Factors



**Beware:** When this happens people will question why you were caught unaware, especially when they view it as your responsibility to have looked at the situation objectively. People expect team leaders to make prudent decisions based on a rational decision making process. When you fail to do so, you hurt the team's efforts.

**Tip:** Use SWOT and revisit your Assumptions Matrix on a regular basis.

## Dominance (Do-ers)



High D's prefer to act rather than strategize and might lose focus when others are talking about strategy. Remind them that focusing on SWOT will allow more action with less interruption later.

- Remind High D's to listen to others and take their opinions into account rather than simply waiting for their turn to speak to lobby for their own ideas.
- Planning can be stressful for High D's, be clear about why the team is setting aside time.

## Influence (Communicators)

High I's may inject their thoughts before providing others with the opportunity to speak first. Observe your High I's behavior and when necessary, ask them to be conscious of their 'airtime'. Here are a couple of tips you can provide:

- Ask that they monitor the time it takes them to jump into conversations. Sometimes the best ideas happen when people get time to consider options and when you jump in, you kill this natural means of getting ideas on the table.
- Inquire about them to find a way that they could become more comfortable with silence. Explain: "If you've ever seen someone rush to fill silence by chattering nervously, you know how it can diminish their authority. So when you're speaking, make your point, and then stop."
- Similarly, let your High I's know it's fine to pause before responding to a question. "Confident people assume that others will wait for them to speak, and that they don't need to rush in to respond before they've formulated their thoughts."

## Steadiness (Thinkers)

When High S's get going, their thoughts are powerful, but only to the extent that those ideas are considered. Commitment to being on the team means being fully engaged and forthcoming with their thoughts. Observe your High S's behavior and when necessary, ask them to be conscious of their unwillingness to bring ideas up during debates or in a timely fashion while the team is in the throws of heated conversation. Here are a couple of tips you can provide:



- Ask that they monitor the time it takes them to jump into conversations. Explain that oftentimes the best ideas happen when people have a lot of options to brainstorm.
- Explain that when you leave it too long to get those ideas out, some team members might have already become locked into their positions, making it all but impossible for them to be open to alternatives.

## Compliance (Correctors)

High C's enjoy analyzing information. They process by drawing logical conclusions and inferences from past experiences. This is how they sort through and make sense of their world. As such, they may neglect new ways of looking at the raw data. This may hamper their ability to come up with ways to move forward or conjure up innovative solutions.

Monitor your High C's behavior and ask them to be open to new ideas. In fact, encourage them to come up with a few new ideas. If necessary, direct them to examples of what you are looking for and pair them up with someone who is naturally innovative. Have a discussion and say: "Sometimes the 'rule book' or 'the old way' is not the best or most efficient way to get the best result. Sometimes it can be, but we always want to make sure that we are using the most effective way and make changes prudently so that they fit into our ever-evolving system." Explained in this fashion, High Cs will usually 'get it' and get on board willingly.

- As an alternative to demanding that they change, ask your High C's to use their high levels of focus and organization to keep track of good ideas and come up with ways that the team could improve with implementation.
- It is important to remind your High C's to look at the big picture and the destination, and not get caught up too much in the precise details of the path. These parts will unfold as plans fall into place. While this seems natural to others, High Cs might find this approach stressful.





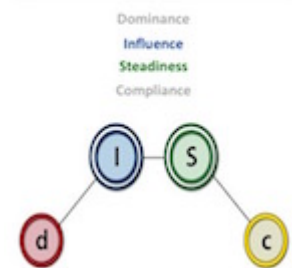
The strategic plan coordinator collects the objective summary/status reports from team members and makes certain that all objectives have been accounted for. He or she makes note of shortfalls, justifies resources, explains any reforecasting requirements, gathers information, and compiles documents. In the strategic plan, the monitoring process should be made as simple and efficient as possible. The goal is to ratify a document outlining the team's objectives and resource requirements, including staffing.

## Dial Up/Dial Down

Communication and strategy are the goals. These are High I and High S tendencies – dial them up! Dial down the D to ensure that the team looks at the situation realistically and thoroughly. Dial down the C to an appropriate level so that you leave plenty of room for different ways of thinking and an open mind to change.

You might inadvertently rush through this step too quickly. Even worse, you may be tempted to delegate this seemingly mundane task to others. This is not only an abdication of leadership but potentially dangerous for the execution of your vision. Do you want someone else to control this? Ask yourself what the consequences would be. Most often, when team leaders delegate this, strategic plans become shelf-ware.

## Useful Factors



**Tip:** If you don't have the skills or time to actually write the strategy, it's more than ok to delegate the drafting of the plan. But you must reserve the right to edit and ratify every draft. Guide your team through this by facilitating a strategic planning process so that it accomplishes the goal efficiently.

**Beware:** Strategy deals with how we need to accomplish goals within the context of the organization's mission and purpose and within the defined time period (stated in "Have to Do" or high level goal statements) NOT how employees must accomplish these – this happens in the implementation plan (RA<sup>2</sup> Interface documents).

## Dominance (Do-ers)

High D's typically do not like to plan. They like action, preferring to start soonest and fix things along the way saying, "At least we're moving forward!"

- Reiterate that this is a time to 'dial down that D'. Thoughtful planning is at the core of great operational execution.
- Discuss the need for thinking things through and planning prior to launching.
- Remind high D's of the simple wisdom of "A stitch in time, saves nine."

## Influence (Communicators)

High I's usually like to get 'buy in' from all prior to putting things down on paper. This usually involves meetings. This is desirable in this step as long as time limits are set.

- Set agendas for all meetings – and stick to them.
- Make sure that all agendas have 'topic lists'. These should ideally spell out what the segmented time allotment will be and what should be accomplished during that time (decision making, brainstorming, information sharing, etc).

## Steadiness (Thinkers)

High S's will excel at deriving the strategy; they will inherently think through the high level macro view as well as through the details of the plan. But be warned, they might spend too much time dwelling in the planning phases.



- Of course you should take the time to think through the steps required on each part of the plan! But there comes a time when actions need to happen. Whenever this transition from strategy to action occurs, High Ss will feel stress.
- Let your High Ss know the direction of the plan so they can dig out the details of the report. Keep your High Ss on the right track and ensure they clearly understand the timeline as well as the overall goal.
- Ensure open communication on this step as the details can vary greatly between the different factors.

## Compliance (Correctors)

High C's are uncomfortable when they don't yet know the answer. When clear guidelines are not apparent, they might look to "How it was done before...." to provide answers. During this step, it is counterproductive to look at not changing some or all of the processes or rules.

- Let your High C's know it's alright during this step to not know how to handle every situation that comes the team's way, but they can still respond with confidence without going back to old policies and procedures.
- A fresh thoughtful outlook is what just might be the ticket to success right now. Have them dial down that C and elevate their S Factor.
- Phrases like "You've given me a lot to think about, so let me get back to you" or "I appreciate you raising this, and I'll think it over" gives High C's structured, prepared words so they can exit tough conversations gracefully.



## Develop the Action Plan

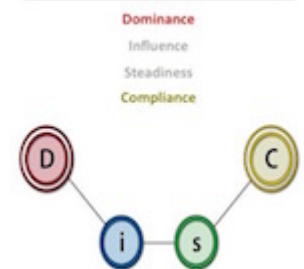
- What do we have to get done?
- Who does what?
- When?

What you want to accomplish has to be written down and ratified. The goals and actions to achieve this must be believable, achievable, clear, and specific, 'resource-able', and have a timeline for completion. These are called SMART goals. The appropriate people are given the responsibility of completing these goals on schedule and on budget. Consistently monitoring the gaps between where you now are and the desired result is the team leader's responsibility. Data and evidence are examined with a view to establishing definitive points, deadlines, and/or references that make apparent progress or lack thereof according to the goals set forth in the strategic plan.

## Dial Up/Dial Down

Results and Accountability are the goals. These are High D and High C tendencies – dial them up! Dial down the I Factor to avoid people lobbying. No more second guessing! Dial down the S because the strategy has been derived.

### Useful Factors



Many team leaders have been labelled 'Fire, Ready, Aim' people. This is precisely because they are so action and results oriented. One tendency to be particularly conscious of is that forward-charging team leaders are expected to make quick decisions, and sometimes they are forced to do so without perhaps getting enough information. In fact, most executive coaches caution High D's in particular to guard against this. Typically people want to make sure they are making a good decision and they can humanly look for ways to validate this. Unfortunately, Confirmation Bias is most often seen when people elevate to a High D behavior (even when this isn't their typical behavior) when they are trying to justify a quick course of action. They might gather just enough information to confirm their gut instincts and steam ahead regardless of other information to the contrary.

**Tip:** Understand and study the rational decision making process fully. Put in checks and balances like an After Action Review Process (AAR) to shore up your team's decision making processes. Learn how to guard against Confirmation Bias.

# Develop the Action Plan

## Dominance (Do-ers)

High D's may resort to extreme lobbying or influencing tactics to get their way.

- Insist on 'airtime' for all team members as you formulate or discuss the team vision.
- Discuss the need for diversity of thought.
- Make sure people understand that it is equally important to lead and follow on a team.

## Influence (Communicators)

High I's may ramble or want to use too many words when putting together their actions.

- Reiterate how important time is as a resource. Repeat the mantra: "Be Brief, Be Bright, Be Done."
- Explain to all team members that conveying information more concisely isn't just a style preference; it's a business necessity for a high performance team. It's something that you need everyone to actively work on.

## Steadiness (Thinkers)

High S's prefer a back seat during difficult conversations, especially during heated debates, which make them further withdraw into a high level of thoughtfulness.

- Ask the person to be direct. Rather than letting the high S's in your team shy away from difficult or awkward conversations, you'll appear far more authoritative if you simply say that you need them to be forthcoming.
- Let them know that the team needs them to say what needs to be said, direct and straightforward.
- Tell your high S's to assume that addressing problems head-on is a key part of their job, and ask them to step up and act accordingly.

## Compliance (Correctors)

High C's tend to be motivated by specific and structured goals, so it is vital to include them in this part of the process.

- Now is the time to get your High C's involved and get their input on HOW to move forward in a well thought out and organized fashion. Planning is their forte, so why not let them do what they love to do?
- Getting the High C's on board now can help to minimize "fact checking", "second guessing", or "Hindsight Bias" later. And goodness only knows that any of these will draw focus away from the action plan.
- Getting C's on board with clear expectations is key to your team's success.





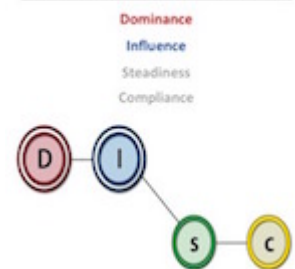
The more complex your messages, the less chance your strategy and goals will be implemented as envisioned. Keep it simple. Your message needs to deliver your purpose and what you expect to happen as a result of the team's efforts. Nothing more, nothing less. Shape your messages with clear concise statements. As you move forward tag these to benchmarks, metrics, and performance management objectives – and whenever possible recognize and reward people who go the extra mile. Never forget to celebrate your team's successes with a well-placed message.

## Dial Up/Dial Down

Results and Delegation are the goals. These are High D and High I tendencies – dial them up! Dial down the S Factor to get out of the planning phase and into the action phase. Dial down the C to an appropriate level so that communication lines can remain open.

Be clear: people typically like their communication short and to the point. They don't have time to sift through reams of information to get to the heart of the matter.

## Useful Factors



**Tip:** Learn how to dissect information and distill it to its essence. Make certain that your team's important information goes out in a format that makes you proud.

The problem: Leaders, managers, and employees fail to realize the dividing line between strategy and implementation plans and the communication of these. Metrics from the strategic plan should tie back to strategic docs and everyone should understand the criteria for success.

## Dominance (Do-ers)

High D's like to keep communication short and to the point. While this is an excellent skill during this step, be mindful to answer the question "why". "We are moving forward by.... Because we expect\_\_\_\_ result."

- Make sure High D's have a clear understanding of direction and boundaries before taking action.
- Remember High D's tend to be Permission Takers, so define authority parameters up front.



## Influence (Communicators)

High I's love to share information, so communicating the action plan will come second nature for High Is. However, this can be a problem when communication isn't ready to be released outside of the team.

- There's no faster way to destroy your team's credibility and authority than to have mixed messages across the organization. Get aligned with your High I's and reiterate the need to keep information inside the team until everyone is ready to release a concise message.
- Forewarned is forearmed. Get aligned with your High I's on tricky or sensitive issues ahead of time. By getting in sync upfront, you'll be able to act with more confidence, knowing that you won't later learn that your High I's had an entirely different take on the topic than you did.

## Steadiness (Thinkers)

Before communicating, High S's will always prefer to mull over the action plan and consider alternate plans to an extended degree. They like to prepare for questions in this manner.



- Ensure that you keep the high S on track when examining alternates. High S behavioral tendencies will over evaluate options if you let them. This can be helpful when you need to go into detail about an action plan but at this phase, listeners might become frustrated because they just want to know what's happening. They don't want to debate if the course is already set.
- When you are ready to move on to the next step be sure to listen to the high D's on the team in order to move the plan from the communication phase to the 'get it going' phase. Let them help you lead people into action. They'll be raring to go, as always!

## Compliance (Correctors)

High C's might get frustrated, upset or even angry when people don't agree with the direction you and your team are heading. Even if they agree, when they communicate and field questions, it might come across as unbending and rigid to listeners.

- People who are confident in their own authority know they don't need to get angry or upset with others because they have the authority to set the direction and they are confident in the delivery of their message. This confidence comes across in an open and listening manner. Getting upset will undermine you, since it signals that you don't know a more effective way to respond. If applicable, coach the High C's through their messaging.
- Provide examples: If you're talking with an employee about how the changes might affect their area of performance (and they sound concerned), you shouldn't sound inflexible or uncaring. You should try to provide confidence that you and the team have thought this through and welcome input and suggestions to move forward.



## EXECUTE THE PLAN

- Take action and consistently monitor actual to expected results.
- Consistently work to close performance and behavior gaps. (Use the P1B1 Matrix.)

RA<sup>2</sup> Interface documents outline an employee's work parameters, which ultimately is connected to their co-workers and teammates. RA<sup>2</sup> Interface documentation identifies the job tasks and responsibilities, and their associated accountability and authority guidelines. Mapping and interfacing of all employee RA<sup>2</sup> Interface documentation achieves the team objectives of linkage and alignment.

## Dial Up/Dial Down

Action and Thoroughness are the goals. These are High D and High C tendencies – dial them up! Dial down the I Factor so that people focus precisely on completing the task at hand and avoid distraction. Dial down the S Factor to avoid over planning and amending the existing strategy, unless logic dictates otherwise.

This must be an unconditionally strong area for any leader, but with every strength, there is a corresponding potential for trouble. Because leaders are typically strong results-oriented people, as a team leader you might press your team too hard to go the extra mile. Great team leaders know that the cadence and tempo of a high performance team insists on a steady optimal pace. Yes, you can push to the limits of their endurance when required but this should not be the norm. If you continually do this, you'll run the risk of burning your people out.

## Useful Factors



**Tip:** Monitor burnout and stress. Keeping track allows you to see exactly how much is on your team's plate, not only day-to-day, but consistently over time. Make sure that you are open and receptive to feedback. Disappointing news that things aren't going as planned can be painful— research shows that failure and losses can hurt twice as much as the pleasure of equivalent gains. However, if you discover you're off course, reliable feedback can show you by how much, and you then have the opportunity to take remedial action in time. The temporary pain of negative feedback is nothing compared to the crushing experience of project failure.

## Dominance (Do-ers)

High D's may try to impose their deadlines (real or perceived) on other team members. They may put their perceived priorities above those of the team. High D's like change and might make unilateral changes without informing others.

- Insist on clear understanding of priorities.
- Insist that any changes that affect deliverables be discussed with appropriate parties.
- Hold High D's accountable for communication to other team members.

## Influence (Communicators)

High I's like to include people in the process, but at this step, the decisions should have been made and it is critical to speak with authority to the team. Here are some tips to give to your High I's:

- Pay attention to your tone of voice. Don't shy away from declarative statements.
- Don't end sentences with a question mark unless they're truly questions. If you sound hesitant or unsure as a habit, people will assume that you and your team either don't really have the authority you should or that you're not willing to use it.

## Steadiness (Thinkers)

High S's will struggle with this phase because they always think: "If we just plan or think about how to do this a little more it might be better." The D's and S's in the team might be at odds with each other in the early stages of the Implementation Phase. This will especially be true if things don't go as planned. "Yes", the S's could say: "I told you so, we weren't ready!"

- Provide logical explanation to why the plan is being executed now. Include the timeline and benchmarks.
- Make sure the team takes action according to the plans you made. Do not allow the High S's to revert back to planning or brainstorming stages. If contingency planning has to occur, make it the focus of the issue you are addressing, not the whole plan. Segment, segment, segment... then see if your contingency plans will affect your overall plan. Not vice versa!
- It is important that they are able to adapt to changes and communicate those changes with their team.

## Compliance (Correctors)

High C's will execute the plan to a "T". This can be great as they are extremely accurate but you must make sure they are updated on any changes to the plan during execution.

- Make sure to update your High C's of any changes as they need clear direction and organization as you make changes. Communicate the 'why's' and 'how's' in logical terms.
- Your High C's will rely on the strength of the plan and its contingency plans. This can be great if you put together a good plan, however if the plan isn't well thought through, be prepared to face the music! If things fall apart, you will need to provide your High C's with clear objectives, plans, and rules on how to proceed with any adjustments for them to get on board without undue stress.
- It will be beneficial to make sure and have a defined structure of roles and responsibilities.





## Control and Revise the Plan

*"By failing to prepare, you are preparing to fail."*  
-Benjamin Franklin

- What are our weak spots?
- How can we improve?

Consequence/contingency planning is the process whereby the team looks ahead at possible sources of failure, catastrophe, malfunction, slippage factors, and/or stoppage issues. The preparation for contingency must occur to build a 'slush' fund for potential emergencies and to inform stakeholders of plans that would automatically be called into play if one or more of the negative impacts occur. And don't forget, a big part of controlling and revising a team's plan also occurs when the fair winds of opportunity blow in your direction too! When situations change, update the team's Assumptions Matrix and tag these back to action plans.

"If it ain't broke, break it, then fix it. Otherwise you may be destined to address tomorrow's problems with yesterday's solutions." Clark Crouch

## Dial Up/Dial Down

Action and strategy are the goals. These are High D and High S tendencies – dial them up! Dial down the I Factor so that people focus precisely on the task at hand. Dial down the C to an appropriate level so that you leave plenty of room for different ways of thinking and an open mind to change.

## Useful Factors



## Dominance (Do-ers)

High D's have the ability to be blunt and "call them like they see them". Use this skill to your advantage and ask them to "poke holes" in the current strategy to allow for contingency planning. Once they get the conversation rolling, remind High D's to listen to other's input.

- Insist on 'airtime' for all team members as you formulate or discuss contingency plans.
- Discuss the need for diversity of thought.



## Influence (Communicators)

High I's can become emotional and expressive rather than calculating and clear when things don't go as planned. This can annoy other team members if a high I speaks without enough clearness of thought.

- Provide feedback, for example: "Get rid of fillers like 'um', 'I think', 'We could just', etc.
- Be disciplined about erasing these fillers from your speaking, because they'll water down your point.
- If you haven't yet thought it through, just pause, otherwise speaking too soon might make you look nervous and less confident in what you're saying."
- Tell them "It's fine to say nothing and listen to others until you can speak with authority and precision. Everyone prefers that."

## Steadiness Thinkers

High S's can ponder a bit too long before taking action to change course, especially if contingency planning is lacking. This can be problematic.



- Start by understanding that High S's require time for thoughtfulness. Contingency launching is a hurried state, but contingency planning should be just up the High S's alley.
- Spending time documenting a process where warnings are raised in time so that the team can react properly is precisely what will make the High S's on the team feel confident.

## Compliance (Correctors)

High C's might respond defensively when their actions or decisions are questioned. This is generally an attempt to protect their position, and it can actually make the person come across as less confident and less in charge.

- Drop the defensiveness. Confident people are open to the possibility that they might be mistaken or that there might be a better way of doing something.
- Be more solution-oriented rather than blame oriented, and ask the same of the team. You will all soon find yourselves on the way to more cooperation and collaboration.

## Conduct an After Action Review (AAR) & Evaluate Lessons Learned



All teams can benefit from the After Action Review process, whether conducted on one-time events or long-term team projects. The goals are to address the basic AAR questions (column one) as well as to document successes and failures in order to learn from both. Everyone who was involved in the actions should be encouraged to participate. AAR can be used with less structure or formality midway through if the work isn't progressing as the team would like.

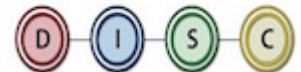
### Dial Up/Dial Down

Keep all 4 factors in check as to not get too high or low on any one factor during the AAR. Be flexible and honest in your assessment, this is not a witch hunt.

All parties must be open to inspection and remain objective in their AAR analysis. Be direct. Rather than shying away from difficult or awkward conversations, as a team leader, simply say what needs to be said, directly and straightforwardly. Assume that addressing problems head-on is a key part of your job, and act accordingly.

### Useful Factors

Dominance  
Influence  
Steadiness  
Compliance



**Tip:** Prepare your team for the AAR by setting the tone. The purpose is to improve the process for the next go-round. Explain the tenets of Noble Intent. Remind the members of the ideology of your Team Commitment Contract and core values.



### Dominance (Do-ers)

High Ds are able to deliver feedback that is accurate and to the point. Remind them that the AAR is the time to say what needs to be said and attack problems head on.

- Remind High Ds to be direct, but not disrespectful or become a "finger pointer".
- The goal is to review the successes and failures, not just the failures.

## Influence (Communicators)

High I's typically do not like to give feedback. They detest anything they are uncomfortable with and anything that could potentially damage relationships. Unless trained to the contrary, they put feedback in that category.

- Chat about how important feedback and the AAR are to the team.
- Put a process in place where feedback is both required and welcomed.
- Train High I's in how to deliver and receive feedback as a gift.

## Steadiness (Thinkers)

High S's will tend to second guess and might have hindsight bias. Hindsight bias, also known as the 'knew-it-all-along effect', is the inclination, after an event has occurred, to see the event as having been predictable, despite there having been little or no objective basis for predicting it.

- If members of your team consistently exhibit this bias (which can be especially irritating to High D's and C's), please provide feedback that foresight is more preferable than hindsight.

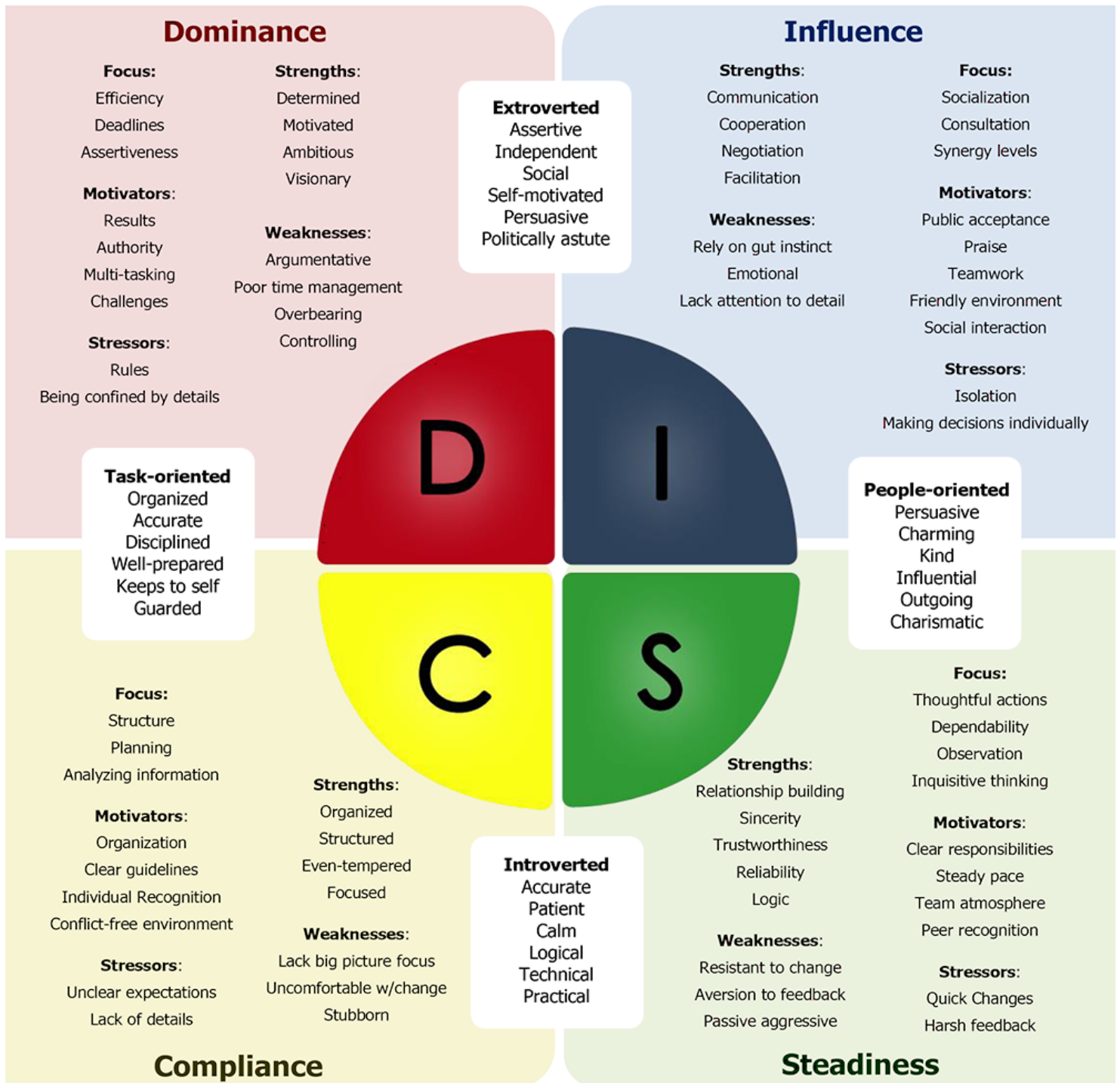
## Compliance (Correctors)

Managing and juggling various tasks and responsibilities is messy business and high C's tend to become inflexible when judging their peers if those peers bend rules.



- If you want to be taken more seriously at work, take a look at how authoritative you appear.
- Many people, especially high C's, undermine their own authority without realizing it, by sticking rigidly to the rules without listening to why things happened. Every situation is different. Some are more similar than others, but they are all different.
- When viewed as too rigid, high C's wonder why they're not more respected. Nowhere is this more apparent than in conducting an AAR.

# Defining DISC Diagram





	<b>Dominance</b>	<b>Influence</b>	<b>Steadiness</b>	<b>Compliance</b>
<b>Strengths</b>	Determined Motivated Ambitious Visionary	Social skills Influence & communication Cooperation Negotiation & facilitation	Build strong relationships Sincerity & trustworthiness Reliable Logical	Organized & structured Even-tempered Focused Responsible
<b>Potential Weaknesses</b>	Argumentative My way or the highway Overbearing Controlling	Reliance on gut instinct Insecure Lack attention to detail May let deadlines slip	Resistant to change Dislike giving or receiving feedback Passive-aggressive Possibility to be self-absorbed	Lack big picture focus Uncomfortable with change Confined by procedures Stubborn
<b>Motivators</b>	Results Authority Multi-tasking Challenges	Acceptance & praise Peaceful & friendly environment Working with others Social situations	Clear responsibilities Steady pace Group environment Recognition	Organizational effectiveness Defined tasks/responsibilities Recognition & reassurance Conflict-free environment
<b>Stressors</b>	Inaction Rules No decisions being made Being confined by details	Isolation Lack of communication Making decisions individually	Quick changes Harsh feedback Taking sudden action Unclear communication	Insufficient planning Multi-tasking Not knowing expectations Lack of detail or information
<b>Communication Style</b>	Important information only No idle chatter Big picture focus	Discussing information Talking through options Brainstorming	Prefer meaningful communication Status updates Thoughtful dialogue	Details and logical answers Cover all possibilities Clear expectations
<b>Decision Making</b>	Quick to decide & act Comfortable with risks Decisions are based on the big picture Prefer authoritative decisions	Receive feedback from others before acting Rely on gut instinct Prefer to know how others would act Prefer consensus decisions	Prefer practical options Hesitant to act Need contingency plan Prefer ad hoc decisions	Focused on facts rather than feelings Prefers to get all the facts Prefer fact-finding over making the final decision Prefer rational decisions