

# Client Lead Handbook for *Your Extraordinary Workplace*

Commitments, Processes and Timelines



Participate  
*Perform*

Produce

Prepared for you by:



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# Introducing Staff to a Culture Transformation Process

## What are we doing?

We are engaging in a 13-month culture transformation process that supports deliberate, reasonably paced, steady improvements to our workplace culture. The game plan includes:

- Defining primary goals and objectives, and setting performance targets
- Participating in assessments; one that measures trust, alignment and engagement (re-issued every 6 months) and the other measuring our priority values and temperaments
- Receiving monthly online individual training
- Participating in employee-led group review sessions on topics covered in individual training
- Receiving additional mentoring support
- Reaching our targets for improvement

## Why are we doing it?

We are introducing monthly professional development to increase and improve trust, alignment, engagement, personal responsibility and teamwork. We only do so by:

- Aligning everyone with a common purpose, values and vision
- Improving our internal communications, customer service, effectiveness
- Developing greater internal motivation and social intelligence
- Eliminating negativity and increasing collaboration
- Driving overall performance so everyone develops skills they need to perform and enjoy their role and grow into future opportunities

## Why LifeWork Systems?

LifeWork Systems is an award-winning training and consulting company with:

- Experience helping organizations to translate abstract concepts and best practices into reality using a fully scalable, distributive process
- A proven track record in leadership development and the development of social and emotional intelligence competencies
- Supports people in communicating better, developing into leaders no matter what their role, and helps create conditions that bring out the best in people.

## Why Now?

Now, more than ever, we are committed to:

- Eliminating practices that cause confusion and misunderstandings
- Introducing practices to help us increase effectiveness and productivity
- Building ever stronger relationships and supportive, caring and trustworthy teamwork
- Operating by purpose and values so we sustain quality even when times are tough
- Standing out as a winner in our industry
- Strengthening our reputation
- Delivering consistent, excellent and positive customer service experiences

# Scope of Work

Key social and emotional skills and conditions are needed for caring behaviors to increase. Therefore, I am recommending the following steps: Assessments (multiple), Training (individual *and* group), Mentoring (monthly; for everyone), Tools and Systems Integration (making new culture practices common in your operations). Additionally, milestones include creation of a custom blueprint for the organization and each individual, with focused conversations and regular training and mentoring. Group and individual oversight are proposed in order to support achievement of specific outcomes, ensure new skills become processes used regularly, and in making course corrections as needed. Together everyone learns their role in contributing to a workplace of shared values, leadership and responsibility. The following are key activities, services and product steps provided. Under Milestones, see specific changes in behavior or conditions experienced.

## Assessment and Human Systems Analysis

### Key Activities

1. Define primary goals and objectives
2. Identify performance targets
3. Assess trust and engagement, colors with Strategic Alignment Survey and Ntrinsx
4. Determine alignment of purpose, values, vision, goals, roles, and procedures
5. Identify essential elements for success

### New Conditions

1. Leaders choose measurable targets (e.g. reducing trust gap, increase retention)
2. Strategic Alignment and Temperament Surveys provide baseline information on 110 employees
3. Leaders commit to participate and meet targets
4. Leaders create and share a plan and next steps
5. Leaders share the direction and model with staff

## Program Implementation

### Key Activities

1. Training on model, roles, tools, strategies
2. Tracking and communication tools adopted
3. Group and individual mentoring sessions
4. Develop and customization of processes
5. Measuring and celebrating progress

### New Conditions

1. All staff receive individual and group training
2. All staff adopt new application strategies
3. Leaders receive mentoring from LifeWork Systems
4. Leaders begin mentoring with their staff
5. Mastery of tools are demonstrable by all

## Integration, Testing, Maintenance

### Key Activities

1. Design use of new tools and strategies
2. Track key performance targets
3. Assemble and report data
4. Make course corrections
5. Define hiring, firing and orientation
6. Identify essential elements for success

### New Conditions

1. Cross functional teams input into culture change
2. Leaders reference model for improvement
3. All demonstrate contributions and adopt skills
4. Leaders design strategies to master tools and skills
5. All move from reactivity to innovation/creation
6. All lead meetings and design improvements

The above scope of work is implemented using a combination of online assessments, eLearning as well as live (virtual) training, consulting and oversight. Employee-led group training and consulting meetings help with integration, adoption and practice of what everyone is learning. In this manner, all services are distributive, mostly self-paced, informative, interesting and interactive. This allows each person to access information from their computers and complete online viewing and activities at times of their choosing (wherever possible and within the bounds of completion deadlines) and then meet to review, make relevant and help turn new skills into practical resources. Support is provided every month so each person can move confidently through the change process.

# Culture Transformation Process Timeline

Timeline	Activities	Participants	Time
Pre-Project Planning Session (before Month 1)	<ol style="list-style-type: none"> <li>1. Review Ntrinsx of client lead and LifeWork Systems consultant</li> <li>2. Review survey descriptions, data and goals</li> <li>3. Review 7 steps, scope of work, general timeline</li> <li>4. Design specific plan, including schedule and logistics</li> <li>5. Begin blueprint process with client lead</li> <li>6. Review mentoring and training processes</li> <li>7. Describe capacity building and steps to gain buy-in</li> <li>8. Identify performance target(s) and how it is tracked</li> <li>9. Review kickoff meeting module and leader guide</li> <li>10. Lead writes letter of intent regarding project</li> <li>11. Lead sends intro letter to project participants</li> <li>12. Identify who's in each group and who's mentoring whom</li> </ol>	Judy Ryan and primary client lead	Approximately 3 hrs. total
<u>Month 1</u> Kickoff & Project Start	<ol style="list-style-type: none"> <li>1. Participants attend first kickoff session</li> <li>2. Participants register into the LifeWork Systems portal</li> <li>3. Letters of intent are completed in the portal</li> <li>4. Participants review 4 pre-project modules (optional)</li> <li>5. Ntrinsx and SAS surveys are completed</li> <li>6. All Group meeting/mentoring session dates are scheduled</li> <li>7. Watch individual module 1+ post survey and workbook</li> </ol> <p><b>*Note:</b> Group facilitators are prepped (each month)</p>	All staff, mostly self-paced except kickoff for all participants	<b>Total: 6-7 hours</b> Kickoff: 2 hours Pre-project mods: 2 hrs. SAS: 40m Ntrinsx: 10m Register and letter: 10m Ind. Module: 1-hour Workbook: 30m *Group prep: 1 hr.
<u>Month 2</u>	<ol style="list-style-type: none"> <li>1. Group review session 1 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual module 2 + survey + workbook</li> <li>4. All receive and review SAS and Ntrinsx reports</li> <li>5. Everyone does mind trust</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m *Group prep: 1 hr.
<u>Month 3</u>	<ol style="list-style-type: none"> <li>1. Group review session 1 in all small groups</li> <li>2. LWS mentor leaders; all staff are mentored</li> <li>3. Individual modules 2a and 2b + surveys completed</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 4</u>	<ol style="list-style-type: none"> <li>1. Group review session 3 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 4 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 5</u>	<ol style="list-style-type: none"> <li>1. Group review session 4 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 5 + survey + workbook</li> <li>4. SAS is re-measured. Results are distributed</li> </ol>	All staff	<b>Total: 5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m Assessment: 30m
<u>Month 6</u>	<ol style="list-style-type: none"> <li>1. Group review session 5 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 6 + survey + workbook</li> <li>4. SAS is re-measured. Results are distributed</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m

## Timeline (continued)

Timeline	Activities	Participants	Time
<u>Month 7</u>	<ol style="list-style-type: none"> <li>1. Group review session 6 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 7 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour pt
<u>Month 8</u>	<ol style="list-style-type: none"> <li>1. Group review session 7 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 8 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 9</u>	<ol style="list-style-type: none"> <li>1. Group review session 8 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 9 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 10</u>	<ol style="list-style-type: none"> <li>1. Group review session 9 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 10 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 11</u>	<ol style="list-style-type: none"> <li>1. Group review session 10 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. Individual modules 11 + survey + workbook</li> </ol>	All staff	<b>Total: 4.5 hours</b> Group session: 2 hours Mentoring: 30-60m Ind. module: 1-hour Workbook: 30m
<u>Month 12</u>	<ol style="list-style-type: none"> <li>1. Group review session 11 - small groups meet</li> <li>2. All staff are mentored; LifeWork Systems oversees some</li> <li>3. SAS is re-measured. Results are distributed</li> </ol>	All staff	<b>Total: 3.5 hours</b> Group session: 2 hours Mentoring: 30-60m Assessment: 30m
<u>Month 13</u>	LifeWork Systems delivers a celebratory/Ntrinsx session for ALL. <ol style="list-style-type: none"> <li>1. <b>This bonus month is sometimes moved to November or December as a celebratory session during the holidays.</b></li> </ol>	All staff	<b>Total: 2-3 hours</b>

# Initial Client Lead Activities

The client lead is the senior executive responsible for signing off on the project contract and the person who is sponsoring the initiative and participating in the lead organizational oversight position. The client lead meets with a LifeWork Systems consultant and they work on the following pre-project steps:

## A. Tasks for CLIENT LEAD prior to CLIENT LEAD PREP Session and KICKOFF Session

1. **Schedule pre-planning session between client lead and LifeWork Systems consultant**
2. **Client lead develops their purpose, core values and vision for the project and reads at kickoff**
3. **Client lead completes registration in online culture portal and intake form**

A notification message goes to the client lead with instructions:

- How to register into the portal for guided processes
- Completion of the client lead's personal and organizational information
- Assigning small group participants into groups (no more than 10), and employee roles
- Identify kickoff dates and optionally define group session dates
- Take the exploration survey if not yet done

## B. Tasks for LifeWork Systems CONSULTANT and CLIENT LEAD *during* PREP session

1. **LifeWork Systems consultant briefly reviews key initial documentation with client lead**

Review the following key documents in the portal provided to lead as highest priorities:

- Client lead's exploration survey report to review existing challenges and desired goals
- How to identify a performance target review, and sketch out a possible tracking plan
- Client lead's and LifeWork Systems oversight consultant Ntrinsx temperament survey report

2. **Consultant helps client lead to construct start on a blueprint**

A blueprint is a document in which the client lead's purpose, values and a vision for the project is captured so it can be shared at the project kickoff and models that this project is purpose and values-based

3. **Assignments for the client lead to complete *after* the prep session**

The following are to prepare not only the client lead but the organization's senior leaders

- Review a list of commitments in the portal and check a box to indicate you have read them, understood them and agree with all responsibilities assigned to you as the client lead
- Write a brief letter of intent in the portal describing why you are committed to the project, what you hope to see improve, and what others can count on from you (a sample is provided)
- Watch four pre-project modules and view client lead handbook
- Review and optionally share with all senior leaders 7 steps to culture change document and video
- Review employee project introduction email and modify it as needed, then send it to all participants with a calendar invite to validate who commits to attend the kickoff session. This generally introduces the culture transformation project, why you are adopting a responsibility-based model, why LifeWork Systems will guide it, why now

Note: This will be visible to project participants at the kickoff and when they register into the project portal.

# Kickoff Session Activities

Tasks for CLIENT LEAD, PARTICIPANTS AND CONSULTANT in a project KICKOFF

A project kickoff session is two hours long and is delivered by a LifeWork Systems consultant using an online group module and leader guide. It is the only group session led by a LifeWork Systems consultant. The kickoff allows everyone to get familiar with the virtual platform, review elements of project, ask questions and start to understand the project plan, scope and activities, roles and responsibilities

## 1. Everyone attends the kickoff session

This session is designed to help everyone understand how to lead a virtual, online sessions as well of the purpose and processes within the culture transformation process. Activities include:

- Sharing the client lead's purpose, values and vision for the project
- Review the online LMS and materials within the project activities
- Review the project game plan and next steps
- Review the culture portal, what's in it and in the documentation center
- Review commitments and the importance of addressing reservations about the project

## 2. Assignments for all project participants after the kickoff session

In the next 24 hours, participants complete the following:

- Register into the LifeWork Systems culture portal
- Review documents in the document resource center
- Review list of commitments and check the box to indicate they are reviewed, understood and agreed to, including responsibilities assigned to each in their role.
- Write a brief *email letter of intent* in the space provided in the portal for this. Each captures reason why a participant is committed to the project and what is hoped for by doing so (sample is provided)
- Complete all onboarding steps listed in Month 1 of the project timeline

Timeline	Activities	Participants	Time
Pre-Project Planning Session (before Month 1)	<ol style="list-style-type: none"> <li>1. Review Ntrinsx of client lead and LifeWork Systems consultant</li> <li>2. Review survey descriptions, data and goals</li> <li>3. Review 7 steps, scope of work, general timeline</li> <li>4. Design specific plan, including schedule and logistics</li> <li>5. Begin blueprint process with client lead</li> <li>6. Review mentoring and training processes</li> <li>7. Describe capacity building and steps to gain buy-in</li> <li>8. Identify performance target(s) and how it is tracked</li> <li>9. Review kickoff meeting module and leader guide</li> <li>10. Lead writes letter of intent regarding project</li> <li>11. Lead sends intro letter to project participants</li> <li>12. Identify who's in each group and who's mentoring whom</li> </ol>	Judy Ryan and primary client lead	Approximately 3 hrs. total



## Commitments - Simplified

Here is a simplified list of all commitments required for participation in your culture change. These are in your portal and you are required to review and accept them as part of your enrollment process. They inform your decision to participate and your letter of intent. They outline new knowledge and new behaviors to learn and adopt. For those desiring a longer definition of each commitment, there is *detailed* list in the next section.

NEW KNOWLEDGE TO ACQUIRE	Lead	Mgmt.	Staff
<b>Oversight:</b> The highest authority learns all processes. The goal of <i>oversight</i> is to make sure change process is occurring and being integrated into operations.	X		
<b>Performance Targets:</b> Identify performance targets and ROI considerations	X		
<b>Benchmarking:</b> Reviewing surveys initially and periodically to discover areas needing attention and to show the value of the project in addressing them.	X		
<b>Capacity Building:</b> How to inspire, ask for and receive commitment. Address resistance to change and build trust and understanding in the process.	X		
<b>Process/Plan:</b> Leaders understand and communicate scope of work, timelines, responsibilities, roles and processes throughout the project and beyond.	X	X	
<b>Roles/Responsibilities:</b> Clarity about who, what and when in change process.	X	X	X
<b>Purpose:</b> <i>Why</i> we are adopting a responsibility and values-based model.	X	X	X
<b>Culture Model:</b> What we are transforming <i>from, into</i> , and how we will do so.	X	X	X
<b>Training:</b> Understanding types, processes and expectations for all training. <b>1. 4 Prep Online Modules:</b> to understand terms and guidelines for the project. <b>2. Individual Online Modules:</b> interactive training, workbooks, post-surveys. <b>3. Group Online Modules:</b> group reviews modules and leader guides.	X	X	X
<b>Mentoring:</b> monthly sessions using process and tools, everyone; no exceptions.	X	X	X
<b>Commitments:</b> Understand commitments and writes a <i>letter of intent</i> .	X	X	X
<b>Culture Portal:</b> How to use portal to access information, tools and processes.			
NEW BEHAVIORS TO ADOPT	Lead	Mgmt.	Staff
<b>Organize:</b> Work with LifeWork Systems to create and implement a plan. Drive change by understanding and communicating timeline and plan to staff	X		
<b>Tracking Targets:</b> Track progress of targets and monitor the tracking plan.	X		
<b>Reporting Success:</b> Share feedback, changes, progress and successes.	X		
<b>Accountability:</b> Documenting and reporting culture task completion	X	X	
<b>Confront:</b> Having conversations about commitment and follow-through.	X	X	
<b>Develop Processes:</b> Create new ways to adopt and use concepts and tools.	X	X	
<b>Facilitate:</b> Lead and facilitate group reviews and strategy sessions.	X	X	
<b>Hire/Fire:</b> Decide new policies and procedures aligned with the culture model.	X	X	
<b>Master:</b> Gain proficiency in skills, so you can mentor, teach and lead.	X	X	

## Commitments - Simplified (Continued)

NEW BEHAVIORS TO ADOPT (Continued)	Lead	Mgmt.	Staff
<b>Orientation and Onboarding:</b> <b>1.</b> Interview and hire new employees based on culture values. <b>2.</b> Deliver kick-off sessions to new hires. <b>3.</b> Take part in interviewing, training and mentoring new staff.	X	X	X
<b>Commit:</b> Everyone writes a <i>letter of intent</i> on commitments and why.	X	X	X
<b>Mentor:</b> Get 30m monthly mentoring (required). Be a mentor (optional)	X	X	X
<b>Plan:</b> Setting aside time to fulfill all tasks in a timely and complete manner.	X	X	X
<b>Implement:</b> Integrating all new skills and tools into workplace practices.	X	X	X
<b>Encourage:</b> Supporting one another in creating success and wins.	X	X	X
<b>Participate:</b> Attending and contributing fully in all meetings.	X	X	X
<b>Complete:</b> Finish all assignments, including training pre and post work.	X	X	X
<b>Resolve:</b> Recognizing issues/challenges and resolving them asap.	X	X	X
<b>Respect:</b> Speaking kindly about the model, concepts, tools, and leaders.	X	X	X
<b>Disclose:</b> Sharing feedback, ideas, feelings and opinions often.	X	X	X
<b>Lead:</b> Leading group sessions and mentoring regardless of title or role.	X	X	X
<b>Follow:</b> Committing to leader/follower flexibility in self and others.	X	X	X
<b>Describe and Demonstrate:</b> Describe, discuss, and demonstrate skills.	X	X	X

## Commitments - Detailed

NEW KNOWLEDGE TO ACQUIRE	Lead	Mgmt.	Staff
<b>Oversight:</b> The highest authority of the business or organization reviews processes, progress, and makes course corrections. The goal of <i>oversight</i> is for he or she to make sure everything on the agenda for the project is occurring and that the information being learned is being integrated into the operations of the business. Oversight is a firm decision to put his or her stake in the ground and hold it there no matter what.	X		
<b>Performance Targets:</b> Creating a way to track the progress of targets and successes as outlined in your benchmarking plan. The objective of this is to collect tangible data for sharing and to make informed decisions for next steps and priorities in the change process.	X		
<b>Benchmark:</b> Identifying performance targets and milestones. Tracking empirical data. Reporting data to staff, and ensuing discussion is established around non-ROI and ROI measures both. This involves CEO communicating expectations through surveys and tracking, communicating what's being measured and why.	X		
<b>Capacity Building:</b> Understanding how to inspire, ask for and receive commitment. The goal of capacity building is to address natural resistance to change and to build trust and understanding in the process. It means that the CEO and members of the leadership team recognize resistance and have conversations about barriers and how to resolve them. This step can result in dismissal of employees but only after consistent reassurance you want them to stay and support in helping them to get aligned with the chosen path for change.	X		
<b>Process/Plan:</b> Leaders understand and communicate the scope of work, timelines, responsibilities, and processes so that these are committed to and communicated fully. The goal of this knowledge is that leaders work with LifeWork Systems recommended processes and plans while choosing nuances most likely to work well for the organization. They also set up schedules based on processes and plan.	X	X	
<b>Roles/Responsibilities:</b> Understanding who does what and when for culture change. The goal is that each person gains an awareness of what is expected of he or she, especially, that which may be new or different. This information helps each understand what is transforming from the old ways into the new.	X	X	X
<b>Purpose:</b> Understanding <i>why</i> we are adopting a responsibility and values-based model. The goal of this is that each person understands the relevance of identifying and sharing their own individual purpose/values/ visions/ goals/ procedures/roles	X	X	X
<b>Culture Model:</b> Understanding what we are transforming <i>from, into</i> , and how to do so. This information helps everyone to hear about and understand contrasts between the new and old models and why the new model has been chosen instead. This allows people to learn about the latest research and best practices on human development, systems, and collaboration. It is also so that each person learns that you value them, respect and encourage them to be powerful and real, and that you will be supporting them to grow and be proactive in managing their relationships, productivity, and engagement.	X	X	X

## Commitments - Detailed (Continued)

NEW KNOWLEDGE TO ACQUIRE (Continued)	Lead	Mgmt.	Staff
<p><b>Training:</b> Understanding types, processes and expectations for multiple training components.</p> <ol style="list-style-type: none"> <li>1. Project Prep Online Modules: Objective is preparation to mentor and coach staff and facilitate group sessions.</li> <li>2. Individual Online Modules: Another type of training is for all staff no matter title or role, with the objective that each works independently using individual online training modules, workbooks, post-surveys, to obtain a common language and set of tools with which to share and practice together and preparing for group review and ownership of what's learned.</li> <li>3. Group Facilitation Online Modules: The third type of training is for all as each facilitates at least one group discussion and practice session on content learned each month in the individual training modules just completed.</li> </ol>	X	X	X
<p><b>Mentoring:</b> Understanding the purposes, processes, and frequency of mentoring. This is key so everyone knows the schedule, regularity, and major reasons and components of mentoring. These include (but are not limited to) support, further education, clarification, practice and reinforcement of purpose, responsibility and competency in self and social awareness and managing oneself and relationships.</p>	X	X	X
<p><b>Commitments:</b> Understanding requirements of time, action, attention, energy, meetings, money, communication, modeling, participation, process development, target milestones, and application. Each person understands expectations in this document and make commitment in the form of a letter of intent outlining their personal, specific reasons for their commitment.</p>	X	X	X
<p><b>Culture Portal:</b> LifeWork Systems has created a portal so your people can access information, tools and processes all related to your culture model. Leaders should use this for oversight of culture activities and committees. Other leaders should use this to communicate adherence to processes. All staff can use this to conduct mentoring sessions, access tools and templates and share information.</p>	X	X	X
<p><b>Organize:</b> Working with LifeWork Systems to create a plan in order to refine an organization-wide change plan, with clearly defined activities and schedules. Job of the CEO or President. Drive change by understanding the timeline and plan and agreeing to each step within it so they communicate it clearly to all staff.</p>	X		
<p><b>Tracking Targets:</b> Create a way to track the progress of targets and successes as outlined in your benchmarking plan. The objective of this is to collect tangible data for sharing and to make informed decisions for next steps and priorities in the change process.</p>	X		
<p><b>Reporting Success:</b> Sharing feedback, changes, progress; recognizing and celebrating successes so that the staff sees the transparency of the CEO and Sr. team and hears what will be done in response to the information discovered.</p>	X		

## Commitments - Detailed (Continued)

NEW BEHAVIORS TO ADOPT (Continued)	Lead	Mgmt.	Staff
<b>Accountability:</b> Documenting and reporting culture practices completion (are people completing training, taking turns leading groups, being mentored?)			
<b>Confront:</b> Having important conversations about commitment and follow-through when anyone is resistant to their commitment or is disengaging in the project, through sabotage of any kind. Confront in the spirit of respect and acceptance of the person, but not behavior. Help each person to recognize barriers and lack of commitment and support them to overcome them, sharing desire for them to stay.	X	X	
<b>Develop Processes:</b> Create new ways to adopt and use processes. Often the organization is not only suffering from poorly defined human system processes but those related to getting, delivering, running and guiding the business. Express the relevance of a systems approach and adopt one organization-wide.	X	X	
<b>Facilitate:</b> Leading and facilitation of participation, discussion, practicing and committing to new skills and concepts learned through group training and other strategic meetings and communications. This activity can extend to any employee of the organization but is required of all top leaders	X	X	
<b>Hire/Fire:</b> Deciding new policies based on behaviors aligned with the culture model. Hiring and firing processes reflect the culture model and relevance of it. This includes revising hiring and interviewing processes so the new culture commitments and processes are fully represented.	X	X	
<b>Master:</b> Gaining proficiency in skills, so you can mentor, teach and lead in all of them until they have become second nature to you over time. The objective of this is two-fold; leaders demonstrate the ability to learn and use the new skills and concepts, and each can answer questions and guide others in their use.	X	X	
<b>Orientation and Onboarding:</b> <ol style="list-style-type: none"> <li>1. Senior executives deliver first kick-off sessions as an orientation to the culture prior to or shortly after hiring new employees.</li> <li>2. Employee leaders lead group training sessions and individual mentoring for new hires, with a commitment to making culture a function of onboarding them to your responsibility and value-based culture fully.</li> </ol>	X	X	X
<b>Commit:</b> Choosing from autonomy, honesty, and accountable alignment and transparency your commitment to the model. All employees, including CEO and Sr. leaders, are required to take this step. Each is requested to write a <i>letter of intent</i> and discuss commitment to the model and processes. Review and overcome barriers. Letters are reviewed when commitments seem to waver, change or drop.	X	X	X

## Commitments - Detailed (Continued)

NEW BEHAVIORS TO ADOPT (Continued)	Lead	Mgmt.	Staff
<b>Mentor:</b> Participating in monthly mentoring on skills and responsibilities for a minimum of 30 minutes (this is required). Mentor others (this is optional) There are specific objectives in each mentoring session. All staff are required to understand and closely follow mentoring a process and use as directed, mentoring templates.	X	X	X
<b>Plan:</b> Setting aside time to fulfill all tasks of culture transformation, including pre and post work, review of reports and data, progress and challenges. Includes planning and implementation of new concepts and tools into operations of the business and creating processes for continued improvement for all systems.	X	X	X
<b>Implement:</b> Integrating all new skills and tools into new workplace practices/ operations so the entire organization sees recognizable saturation of the model.	X	X	X
<b>Encourage:</b> Supporting one another in creating success and building commitment to the new culture as well as individual goals and aspirations of each person in any way that matters to them. Consciously engaging in new encouragement strategies.	X	X	X
<b>Participate:</b> Attending and contributing fully in all meetings, trainings, and mentoring sessions. Sharing your purpose and values, and working on your blueprint. Becoming both a follower and leader in a dynamic manner as needs arise. Leading group sessions, mentoring with new employees, and being prepared for group and mentoring sessions, as the mentor and mentee.	X	X	X
<b>Complete:</b> Finishing all work assigned, including pre and post work in training. Bringing completed binders to all training and mentoring sessions so conversations are productive. Ongoing development of individual blueprints and mastery of skills.	X	X	X
<b>Resolve:</b> Recognizing and addressing issues, and acting until fully resolved.	X	X	X
<b>Respect:</b> Always speaking thoughtfully about the model, concepts, tools, and one another. Respect is felt in humanization of one another, and in unconditional acceptance and kindness; when people are more important than beliefs.	X	X	X
<b>Disclose:</b> Sharing feedback, ideas, feelings and opinions in surveys and at meetings so people can see your vulnerability and authenticity. Creating authentic relationships and teamwork and overcoming decisions based in fear.	X	X	X
<b>Lead:</b> Leading group sessions and staff meetings regardless of your title or role. Learning to both lead and follow without puffing up or shrinking. Learning to effectively collaborate and problem solve in cross- and trans-functional teams.	X	X	X
<b>Follow:</b> Committing to leader/follower flexibility and supporting others to be successful when they take the lead.	X	X	X
<b>Describe and Demonstrate:</b> Describing, discussing, and demonstrating key skills, components, blueprints, and tools within the model, including their relevance and applications. Keep all that's learned front and center in people and practices.	X	X	X

# Alternative to Express PURPOSE and VALUES

You want to make sure you do something to show some inspiring, informative, reassuring or fun angle regarding purpose and values each time you talk about them.

**PURPOSE** (DO NOT SKIP OVER **PURPOSE** IN YOUR GREATER COMFORT IN FOCUSING ON VALUES ONLY)

Here are just a few suggestions:

1. **Ask specific questions:** What helps you to have faith in our purpose when stress and challenges hit? How did you help someone experience our purpose recently? What are some awesome results that could come to us because of our purpose? What are some positive things that came about due to our purpose (personally, or as a team)?
2. Create a **poster** of images or otherwise **graphically depict** (draw or get from magazines, online or anywhere you can find **images** or **words**), that communicate how your purpose manifests; for example, in relationships, in physical experiences, events, innovations, or more. Also, you can use images or words that depict what is needed to accomplish it, to foster it, to have fun in it, to demonstrate it, protect it, remember it, etc.
3. Share **quotes**, **YouTube video** links and **articles** that express it.
4. **Snapchat** about it.
5. Write a **blog or article** and then share it out.
6. Do a **podcast** on it and share it out.
7. Express or describe or **capture in self-created video** the **emotions** it causes.
8. Describe the **biggest, best possible effects** of it.
9. Share the **health benefits** of it.
10. Write a **poem** or **limerick**.
11. Share the joy of it through **humor**.
12. Share what **disasters could be avoided** because of it.
13. Share what **life would be like without** it.
14. Share what **life would be like with** it.
15. Share the **knowledge** or **understanding** of what it means.
16. Share **stories** that reflect it or some aspect of it.
17. Reference it in **movies**, **songs**, and **dance** moves.
18. Create and share ways you'd like to **over-communicate it**; for example, "Will you share our purpose with one person today and briefly discuss what it means to you?" Or, put it in your cubicle and decorate the look and feel of it, or include it in your email signature, or on your social media, etc. Or open meetings and events with clients by discussing it.
19. Describe each word in your purpose. For example, my purpose is... *To create a world in which all people love their lives.* What do I mean by **create**? In other words,
  - I will make this happen within companies, schools, families
  - I will make it available to all people through technology
  - I will support all learning styles for ease of understanding/use
  - I will support its sustainability with implementation systems
  - I will partner with people to accelerate it
  - I will write and deliver live, TV, and radio content on it

## Alternatives to Express PURPOSE and VALUES (Continued)

What do I mean by **a world**? In other words, infused into

- Every physical location (worldwide, universe-wide)
- Every system
- All conversations
- Every problem solved
- Every relationship
- Every wish, hope and dream

What do I mean by **all people**? In other words,

- Adults and children
- People I like and don't like
- People I agree with and don't agree with
- People of every religion, race, size, sex or shape

What do I mean by **love their lives**? In other words, I want them to **feel**:

- Joy
- Peace
- Excitement
- Hope
- Love

And for each to experience **extraordinary fulfillment** in every aspect of their lives, For example:

- Spiritually
- Physically
- Financially
- Socially
- Mentally
- Emotionally

What do I mean by **love their lives**? In other words, I want people to love the unique life *they* want to live or that they feel called to live. There's no one else they have to be, or should be.

What do I mean by **love their lives**?

- Cherished when strong or weak, young or old
- Enjoying whatever they are doing, good or bad
- Knowing they are loved in every condition or circumstance
- Life is an adventure; they love their relationships, their work, and have FUN!

### **CORE VALUES** (CORE VALUES ARE NOT SEPARATE FROM ACCOMPLISHMENT OF YOUR PURPOSE)

Here are just a *few* suggestions:

1. Ask which ones are **challenging** and why.
2. Ask which ones are **easy** and why.
3. Share what **life would be like without** them.
4. Share what **life would be like with them**.
5. Discuss which ones you **like best** and why.
6. Discuss which ones you **don't understand or most often forget** to do.



## Alternatives to Express PURPOSE and VALUES (Continued)

7. **Graphically depict** (draw or get from magazines, online or anywhere you can find **images** or **words**), that communicate how each or all of your values manifests; for example, in relationships, in physical experiences, events, innovations, or more. Also, you can use images or words that depict what is needed to accomplish it, to foster it, to have fun in it, to demonstrate it, protect it, remember it, etc.
8. Find **quotes** to share that express each or a few of them.
9. Express or describe or **capture in video** the **emotions** one or more of your values causes.
10. Describe the **biggest, best possible effects** of one or more of them.
11. Share the **health benefits** of doing or being any of them.
12. Share what **disasters could be avoided** because of them.
13. Share the joy of them through **humor**.
14. Share the **knowledge** or **understanding** of what they mean.
15. Share **stories** that reflect some aspect of one or more of them.
16. Reference them in **movies, songs**, and **dance** moves.
17. Create and share ways you'd like to **over-communicate it**
18. Write **a poem** or **limerick**. Below are a few I've done. The first is a poem called *Passionate People of Peace* and my Christmas card message below that.

### Sample creative writing/poem:

#### Passionate People of Peace

People of strength, comfort, and light  
People of focus, committed to a future that's bright  
People building new ways for the world to see  
Creating beacons of hope that show what life can be

People with smarts, savvy, and flair  
Who show the world how to mindfully care  
Who create a network of positive strategies and skill  
So people stop resorting to force, domination, or the kill

People who learn and apply the best relationship tools  
So those whom they lead can avoid acting like fools  
People who are fun, free, spiritual and wealthy  
As they choose to be socially and emotionally healthy

People of heart, creating as a wise team  
As fluid and flexible as a cool running stream

# Building Capacity to Change

## Capacity Building

*Capacity* is defined as the ability of individuals, organizations or systems to perform appropriate functions effectively, efficiently and sustainably.

Capacity building or capacity development is a process by which individuals, groups, organizations, institutions and societies increase abilities to: (a) perform core functions, solve problems, define and achieve objectives; and (b) understand and deal with development needs in a broad context, in a sustainable manner.

There is no singular definition of capacity building. Over the years, 'capacity building' has moved from being a focus, to individual training, to the development of institutions and more recently to a complex systems philosophy where individual capacities are linked with those of organizations and systems at large. This is key to our work with you.

## Characteristics of Capacity Building

Capacity building is a continual process of improvement within an individual, organization or institution, not a one-time event. It is essentially an internal process, which often may only be enhanced or accelerated by outside assistance. Capacity building emphasizes the need to build on what exists and to utilize and strengthen existing capacities, rather than arbitrarily starting from scratch. However, in some situations radical and extensive changes are needed. We build upon strengths and sometimes completely overhaul your systems.

Human-centered development strategies emphasize that besides being a means to an end (i.e. improvement of performance), capacity building has an intrinsic value on its own in fostering job satisfaction and self-esteem.

An essential aspect is to build capacity for coping with change and to instill an integrated and holistic approach rather than traditional, narrowly rigid ways of thinking in addressing problems at hand. Your transformation process and proof-of-concept project provides just such an opportunity through realistic pacing and proven systems that minimize fear of change.

Capacity building takes time and requires a long-term commitment from all involved. Success of capacity building efforts should not be measured in terms of results or performance targets alone, with little attention to sustainability. When making long-term change, one must take into account not only short-term but also intermediate- and long-term results. These results can be measured, but require a broader selection of measurements and indicators than only quantitative ones. We help you define such indicators to recognize and celebrate incremental progress.

## Avoid Sabotage by Building Capacity

Leaders must create buy-in with employees through in-person meetings (if needed). Together, you determine how each will gain buy-in. You may encounter individuals who need to better understand the purpose for the project in order to support and cooperate fully in the change process. You spend individual time with each one to determine resistance or willingness. Review the form of knowledge to be learned and new behavior to adopt. Be open, receptive and kind about whatever position they take initially, letting them know you want them to be happy in the new culture if willingness is present.

## Buy-In

It's important to individually and collectively enlist buy-in to the highest degree possible. Once commitment is gained, each employee reads and signs a *commitment-of-intent document* outlining they understand the process and requirements and are committed to the success of the project.

## Building Capacity to Change (Continued)

### **Recommendation**

Ideally all buy-in and *commitment-of-intent documents* should be completed before introducing key activities of the project. Spending time with each employee until they are willing involves having straightforward and open conversations, asking their opinions and sharing why changes are needed, what results are sought and ultimately how you want each person, no matter their role or title, to act and feel to live to organization's purpose and values.

Should it be necessary, due to resistance, I will spend time defining strategies with you for addressing any employee who is reluctant or refuses to buy-in. Ultimately, in order to have the greatest opportunity to create effective change, we recommend you be willing to ask those who are not willing or interested in a responsibility-based model to leave.

### **Scope and Sequence**

For 13 months, key activities of this project (see scope of work and timeline) are implemented with all employees and may be extended beyond the initial eighteen months.

# Identifying and Achieving Performance Targets

**Definition of a Target Area:** A *target area* is a generalized condition you want to improve. My goal is to help you to develop human systems and leadership capabilities that support growth and build motivation from within so everyone can create outcomes that flow from strategic purpose, values and vision. To do this, you identify one or two performance targets. Then, together we collect baseline data and support your team (ideally with a LifeWork Systems consultant in a guided culture project, to achieve the target. Then, you can identify *and track* milestones along the way to reaching your targets. Possible *target areas* could include:

- Reducing trust gap
- Increasing alignment
- Improving retention
- Reducing gossip
- Improving service
- Reducing complaints
- Improving relationships
- Improving productivity
- Improving engagement
- Improving performance
- Improving profit margins
- Increasing revenues
- Improving staff satisfaction
- Improving customer satisfaction
- Increasing resolution of issues

**Definition of a Performance Target:** A *performance target* is a specific outcome described in numbers and/or degrees of change. It can also include information on *who* benefits and how they benefit. For example, a *target* for the *target area* **reducing gossip** might read:

*"By the end of 6 months, reports of negative, character-degrading, and blame-filled conversations in dept. X have been reduced from 20 per week to 1 or 2 per month."*

**Definition of Target Tracking:** A method of tracking progress and identifying what is working, what is not working, and what needs to be adjusted to progress forward. Should you engage LifeWork System, your performance targets form the basis of our relationship and drive our work with you. Then our goal is to help you and all you lead to succeed in developing social, emotional, and leadership skills to carry the day and reach your targets.

**Exploration Survey:** In addition to identifying and setting performance targets, we strongly urge you to take our complementary EXPLORATION SURVEY. When you do, you can choose various challenges and desired leadership support that helps you identify related target areas. In addition, you receive the value we offer in a free report on your overall culture practices, including your greatest and strongest areas of need at this time and a set of conclusions and recommendations. *See challenges and desired leadership development skills on next page.*

## **My Performance Target:**

By \_\_\_\_\_ (when) we have: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

which \_\_\_\_\_ (who benefits)

which impacts positively by creating \_\_\_\_\_

\_\_\_\_\_ (benefits)

## **Sample Performance Target** (create some version of this):

By \_\_\_\_\_ (when) we have reduced our trust gap from \_\_\_\_ to \_\_\_\_ (what specifically) which has increased our ability to communicate effectively and resolve relationship problems (benefit) and raise employee satisfaction (who) and customer satisfaction (who) thereby increasing the number of referrals we receive.

# Identifying/Achieving Performance Targets (Continued)

**Challenges** you may have check-boxed in your *exploration* survey help determine where to focus to choosing and tracking one or more performance targets:

## Challenges

- Employees not engaged in the company purpose, values and vision
- Low trust and morale
- Poor teamwork
- Poor relationships
- Lack of clarity and approval of purpose, values, vision, goals, procedures and roles
- Destructive negative behavior (e.g. gossip and under-performance)
- Inability to attract and retain good people
- Weak or non-existent leadership development processes for future growth
- Inadequate customer loyalty and retention
- Shortage of key social and emotional intelligence skills
- Poor customer satisfaction
- Inadequate or non-existent strategic plan for healthy organizational culture
- Lack of metrics and analysis of engagement, trust, and alignment
- Lack of adequate training in professional development

## Possible Target Areas

- Everyone can recite our purpose, values and one vision, including how to support it
- Decrease our trust gap (on SAS)
- Improve engagement levels (on SAS)
- Reduce number of relationship issues
- Increase our alignment levels (on SAS)
- Completion of blueprint process for all staff
- Everyone can demonstrate clarity around, and use of, the redirecting negative behavior tools
- Increased retention and satisfaction
- Increased use of a specific number and type of leadership development skills
- Increased time with client and more referrals
- Increased use of a specific number and type of leadership development skills
- Increased customer satisfaction ratings
- A practical plan for our workplace culture including operations such as hiring, firing and orientation
- Analysis of SAS survey regularly with strategies to address each deficiency for improvement
- Mastery of a set of identified professional skills
- Decreased absenteeism

**Desired Leadership Skills for Staff** from your *exploration* survey can determine performance targets:

## Desired Leadership Skills for Staff

- Committing to a cultural transformation and demonstrating commitment in word and deed
- Personal mastery of emotional and social intelligence skills, and tools in the model
- Sharing power and demonstrate leadership
- Regularly (monthly) mentoring
- Benchmarking regularly and reporting to staff on results and next steps.

## Possible Target Areas

- Everyone is reported to be engaging in all project activities, and new culture processes
- Everyone completes a test on all components and tools in the model and demonstrates competency
- Everyone rotates leadership of group review
- Everyone is mentored monthly
- Measure, report, invite problem-solving, course correct, then rinse and repeat

# Training, Mentoring and Systems Integration

Throughout your project, we employ *flipped training*, a best practice originating within education. *Flipped training* is an instructional strategy and a type of blended learning focused on engagement and active learning, giving the individual, group facilitator, mentor and organizational leaders a variety of ways to address mixed levels, difficulties, and differentiated learning preferences. Another way to describe *flipped training* is multiple and varied exposure to content, repeatedly over time. The following are included:

1. **PRE-PROJECT PREPARATORY ONLINE MODULES.** Review of these 4 online modules are required by all staff as an introduction to primary concepts and activities in your culture transformation process. These modules are not interactive but rather instructional only.
  2. **INDIVIDUAL INTERACTIVE ONLINE MODULES.** These are assigned after your kickoff session and throughout the duration of your project. They:
    - Are reviewed one at a time and each is approximately an hour long
    - Each has a workbook with required assignments referenced in group sessions
    - Each includes a required post-training survey which is fed back to your next group facilitator
    - Sometimes modules include industry statistics and best practices, written and video
    - Are designed to appeal to kinesthetic (hands-on), as well as auditory and visual learning styles
    - May have phone apps and other reference materials
    - Include concepts, ideas and new skills discussed at upcoming *group training* sessions, in monthly *mentoring* sessions, at *process development meetings* and within systems integrations
- Recommendation: Teach, discuss or share what you're learning within 24 hours to solidify and retain it.
3. **GROUP TRAINING MODULES.** Group review sessions parallel individual modules and are employee-led on a rotational basis.
    - Each session is designed to review and practice related content from the previous individual module
    - Group sessions are required and include a maximum of ten people
    - Group modules come with a leader guide for team members assigned to facilitate each session
    - Facilitators are prepared by a LifeWork Systems consultant 3-7 days in advance
    - Workbooks from individual sessions are required at group sessions for sharing information
    - A LifeWork Systems consultant oversees all group sessions
    - Group review sessions are designed to **review**, make **relevant** and adopt concepts as **resources**
  4. **MENTORING SESSIONS.** While *mentoring* is not technically *training*, it is another activity that reintroduces and encourages application of training content and is consistent with *flipped training*.
  5. **SYSTEMS INTEGRATION.** *Systems integration* is another activity that re-introduces and encourages application of content regularly as is consistent with *flipped training*. Throughout and after your culture transformation process, LifeWork Systems works with your leaders to develop strategies and teams for integrating culture tools, concepts and new practices into the operations of your organization, accessing all through your culture portal.

# Mentoring Purpose, Pitfalls and Processes

**Purpose** of LifeWork Systems *mentoring* includes:

- Development of emotional intelligence - self / social AWARENESS, AND self / social MANAGEMENT
- Expressing appreciation and recognition to each person being mentored
- Brief review of purpose (group and individual).
- Supporting task ownership. Tasks that each person *owns* include managing:
  - Relationships - Do I have 10's with people (not necessarily best friends but rather no troubling challenges or unresolved issues)? Do I make this top priority and foundational?
  - Productivity - Am I feeling and being competent, excellent and efficient in getting things done?
  - Engagement - Am I fully engaged, bringing my A-game? Excited about my job?
  - Blueprint - including next steps on purpose, values, visions, goals, procedures or roles
  - Tools - Use and mastery in understanding and applying them

**Note:** All employees at every level receive mentoring each month, no exceptions.

## **9 Pitfalls to Avoid During Mentoring**

1. **Stories or advice:** Allowing or encouraging the one being coached to share stories and engage in conversation (LifeWork Systems coaching is not talk therapy, venting, or advisement). Use *time out* motion
2. **Poor questions:** Do not focus on *why* and *who* questions which are less helpful than *what* and *how* questions - good questions are "what is your plan?" "What are some tools you could apply?" "How will you accomplish this?" "What's next?"
3. **Veering off course:** This happens because the person being coached thinks a thought about something else and diverts you from the question asked (likely unconsciously)
4. **Winging it:** When coaches do not use our templates (they think it's better to "wing it" or to add their own needs/wants to the session that has nothing to do with task ownership as defined above)
5. **Ignoring avoidance:** listen for victim/blaming, vague, uncommitted language and/or behaving; not answering questions as asked
6. **Other agenda:** Mentor interjects own agenda (focusing there instead of fully focused on person being mentored)
7. **Poor time management:** Mentor does not manage the 30m schedule in a time-efficient manner
8. **Saying too much:** (including advising and counseling) instead of asking questions (Socratic) that lead the person to self and social awareness AND implementations related to *their* discoveries
9. **Skiping or Repurposing** mentoring sessions vs. requiring them for every person, every month

## **Component Mentoring Activities**

1. **Review purpose and core values:** Do NOT bypass *purpose* to get to values. Review both briefly
2. **Connect:** Spending time with, appreciating, and 100% serving with generosity and respect
3. **Comfort with discomfort:** Lead by walking the walk, and modeling fearlessness about discomfort
4. **Support:** Encouraging, self and social awareness, diagnosis, resolution, with practice and commitments
5. **Train/practice:** Review tools related to issues or just to continue to supporting mastery of each
6. **Gain/Track commitments:** Notate committed actions and next steps in notes, your calendar and follow-up
7. **What it's NOT:** Psycho-analysis, therapy, chit-chat, gossip, conversation, top-down dynamics, stories, details, or advising
8. **Watch for and use any opportunity as a teachable moment!**

## **Leader Preparations for each Mentoring Session**

1. **Read** handoff notes if you are co-mentoring sessions with another person.
2. **Review** past notes and commitments, the mentee's Ntrinx colors, and consider current state of their behaviors you see or know of in and outside of mentoring.

## Mentoring Purpose, Pitfalls and Processes (Continued)

3. Fill out their **General Summary Data Form**. This is on the portal. Initially, fill out their name, date and any other pertinent information
4. **Bring your own tools** (phone apps, templates and tool booklets) for use at sessions

### Processes During Mentoring

**Note:** Mentoring sessions should be no more or less than 30 minutes. Do not extend time beyond the agreed period. It's critical to follow the process, using the mentoring checklist faithfully, without variation, and be fully prepared in advance in order to be highly efficient. Also, when supporting improvement in *relationships, productivity* and *engagement*, if you see issues your mentee is not seeing, *you introduce them*.

1. **Recognize and Appreciate** (*briefly* state appreciation). Not appreciation for coming to the meeting. Make sure you are sincere, make eye contact, and pay attention to, if and that the mentee receives it.
2. **Review Purpose and Values**(*briefly*) Bring copy with you. Do not avoid talking about purpose.
3. **Review Past Issues/Commitments** (*briefly*) Have notes with you; add current observations too.
4. **Ask for scores on the first 3 on the template** before choosing a priority area to work on.
  - a. **Relationship issues:** Your objective is **he/she** become aware, then make a plan, including practice it.
  - b. **Productivity issues:** Your objective is **he/she** become aware, then make a plan.
  - c. **Engagement issues:** Your objective is **he/she** become aware, then make a plan. This is about *motivation*. and *commitment*. Draw on **his/her** purpose and values. Seek new **values, choices** if needed.
  - d. **Review Blueprint:** Your objective is **he/she** become aware, then make a plan, especially for moving forward *through* visions, goals, procedures and roles to celebrate progress, then on to something new.
  - e. **Review Tools and Skills:** Review their *It Just Got Real* sheets. If there is time, bring out the list of skills to **review** and **practice**.
5. **Express Thanks:** Thank them and recognize their hard work.

### Processes After Mentoring

1. **Log session once completed:** Go to team tool and record notes and completion of this activity.
2. **Briefly update your General Summary Data Form** within 24 hours. You demonstrate a high level of support to keep specific issues and commitments in mind for accountability and to celebrate progress.

**Final Instructions:** The *General Summary Data Form* is in portal. Keep them updated for all your sessions.

### Responsibility of Person Being Mentored

1. **Show up on time and prepared.** Consider your *relationships, productivity* and *engagement* levels and have your numbers already identified to jumpstart support.
2. **Bring documentation:** Have your blueprint, worksheets (filled out) and workbook with you.
3. **Participate** in an efficient and engaged manner. Do not try to divert conversation to other activities.
4. **Set a plan of action.** Make it a priority to move forward with specific, time-bound plans.
5. **Take responsibility to follow-up with your mentor** when you've said you would.



# Mentoring Purpose, Pitfalls and Processes (Continued)

## General Summary Data Form for Mentoring

This is a form so you can take notes before and after you conduct a mentoring session with the person being mentored. This is a way of tracking what is most critical to him or her.

MENTORING 1 – DATA FORM AND TEMPLATE

Guided Culture Transformation > Mentoring 1 – Data Form and Template

IN PROGRESS

Use this data form to take notes before and after you conduct each mentoring session with the person(s) you are mentoring. This is a way you can track what is most critical in mentoring him or her. The pre-notes can be any areas you identify as needing improvement. The post-notes are on any committed actions steps made by the mentor, including completion date and how they communicate it. You can save this form and come back to it (click **Save and Continue Later** button) after your mentoring session to add any final thoughts before submitting. Once the Submit button is clicked the form is submitted and finalized, you will receive an emailed copy of the submitted information for your future mentoring sessions. In addition to this data form, click on the Mentoring Template link below to get to your template for mentoring this month.

MENTORING TEMPLATE 1

MENTORING PURPOSE AND PITFALLS

Mentor Name

Mentee Name

Date of Mentoring Session

LifeWork Systems

Dina Readinger

mm/dd/yyyy

Ntrinsx Natural Colors

Color 1

Color 2

Color 3

Color 4

Blue

Green

Gold

Orange

Ntrinsx Work Colors

MENTEE'S NTRINSX WORK COLORS

Color 1

Color 2

Color 3

Color 4

Orange

Blue

Gold

Green

What is most important to keep in mind about this person's Ntrinsx color profile

Session Information

Notes (prior to session)

Notes (after session)

Enter any concerns or observations that you bring to the mentoring session

Enter any tasks or commitments that require follow-up or have a committed timeframe

B I

B I

Relationship Issues?

Yes

No

You Observe:

They Observe:

B I

B I

Productivity Issues?

Yes

No

You Observe:

They Observe:

B I

B I

Engagement Issues?

Yes

No

You Observe:

They Observe:

B I

B I

SUBMIT

SAVE AND CONTINUE LATER

# Mentoring Template Month 1 (after kickoff)

**Instructions:** Bring blueprint and Ntrinsx summaries. Complete *General Summary Data Form*. Do not read answers in orange unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation\*** for this employee. Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2. Share briefly on** organization's blueprint\*\* **purpose and one core value** (core values are *not* 8 that build trust). Ask 1-2 questions.
- ☐ **3. Review purposes, pitfalls and processes for mentoring.** \*\*\* They need to know that mentoring in our model different (SLAM).
- ☐ **4. Review Ntrinsx results\*\*\*\* on both you and mentee.** Ask if they think the report is accurate. Share takeaways on these.
- ☐ **5. Ask the following questions:**
  1. In the first module you heard the 8<sup>th</sup> grade story. *Can you recall any of the key concepts to this story? (see/share points in notes section)*
  2. What do you think and feel about a responsibility-based approach?
  3. What do you think about the high disengagement levels as stated in this module, including the costs of lost revenues?
  4. What did you hear has the basis of all internal and external struggles? (*inferiority complex*)
  5. Why is psychological safety important?
  6. What are the 4 core needs (*empowered, lovable, connected and contributing*)
  7. Do you currently have any challenges with any authority figures?
  8. Can you confidently commit to all 4 parts of the mind trust (*1. I won't say bad things about you behind your back. 2. I'll come to you if I have an issue with you, 3. I won't let others talk bad about you with me, 4. I will try to get them to go back to you*)
  9. As your mentor, **how can I best support you?**
- ☐ 8. End with **appreciation** (make sure they receive it).
- ☐ **Note:** Make time to fill out the **mentoring data form** for this person before and after this session. In this way, you are able to remember this person's colors, their concerns and solutions, your observations, and actions committed to and requiring follow-up by yourself or the person being mentored.

## Notes

\***Appreciation** should be on things intrinsic about this person (e.g. not looks). Make sure they also receive it (vs. deflect or ignore it).

\*\***Bring blueprint.** Make sure you keep purpose and values varied/motivating.

\*\*\***Bring document on mentoring: purposes, components, and pitfalls.**

\*\*\*\***Ntrinsx** bring summary of Ntrinsx reports on both of you.

## 8<sup>th</sup> Grade Story

- I asked what he wanted: e.g. Do you want peace?
- He was curious because of kindness.
- He was willing to look and change.
- He shifted from feeling/being a victim to being empowered and responsible.
- He realized his part and that he could change it.
- Transfer of responsibility occurred (Task ownership)
- He was willing to use his power in a different, constructive way.
- The whole room learned/shifted.
- Others rose to support.
- Any noble tool can be used destructively (e.g. peace pledge)
- Everyone was participating in the dynamic (all in same boat)
- S.L.A.M.: Say less ask more.
- These are skills we rarely develop especially in kids; in general, most people blame and analyze rather than consider personal power/responsibility

# Mentoring Template Month 2

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in **orange** unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation\*** for this employee. Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2. Share briefly on** organization's blueprint\*\* **purpose and one core value** (core values are *not* 8 that build trust). Ask 1-2 questions.
- ☐ **3. Ask the following questions:**
  1. In your recent individual module, you learned about a Teal culture model which has the same 5 characteristics we have in our responsibility-based model? What are these? (*purpose-orientation, freedom W/ responsibility, shared power, agility and wholeness*)
  2. What are the 4 components of emotional intelligence? (*hint: the first one is self-awareness – give them time to answer, then the other three are self-management, social awareness and relationship management*)
  3. What is a psychological contract? Why does it matter? (*it's assumptions we make about what we are expected to give and what we are entitled to receive. It matters because when there is no communication with a misalignment about things, that breaks into bad feelings.*)
  4. In the dialogue tool, you are listening for 3 types of communication. What are they and why is this tool helpful? (*content, logic or world view, emotions. The tool is helpful for many reasons but one is that it makes people feel lovable, one of the 4 core needs*)
  5. The personal responsibility chart is a pivotal concept in our responsibility-based culture model. What do you remember about it, how can you use it as a tool? What are some of the words a person uses when not aligned?  
\*\*\* (*You can recognize by words, body language and tone of voice if you or another person is fully engaged and accountable about anything. Words like, I should, have to, ought to, need to, I'll try, I can't and probably*)
  6. Self-betrayal. You heard of a woman who was fired for not completing tasks on a list. What was her part in this? Why do we call operating from other-directed as "you are in your blind spot?" (*Woman puffed herself up as a victim/martyr, and rebelled by not completing all and did not see her part in this. She could not see her choice.*)
  7. You learned about making accountable requests and agreements. What are the two parts in these requests and the three parts in agreement? (*Requests 1. What I want is...2. Are you willing? Agreements 1. What I hear you saying is... 2. Did I get that right? 3. My answer is...*)
- ☐ **4. End with appreciation and thanks** for this employee. Make sure they receive it. (This should be one-way. They do not appreciate you)

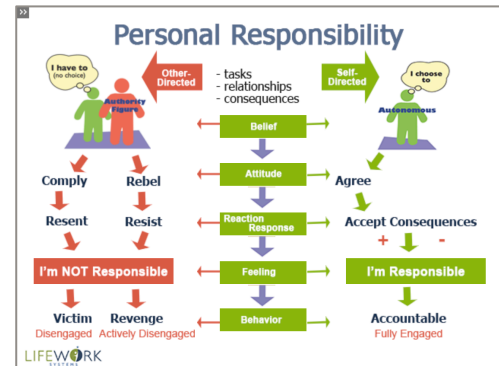
## Notes

\***Appreciation** should be intrinsic about this person (e.g. not looks).

\*\***Bring blueprint.**

**Note:** Be prepared yourself and ask them to retrieve their workbook if they did not bring it.

\*\*\***Personal Responsibility Chart.** It helps you know if you or someone else is in the other-directed or self-directed thinking and behaving.



# Mentoring Template Month 3

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in orange unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation.** Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2. Share briefly on your organization's purpose and discuss one core value\*** (your core values are *not* the 8 values that build trust).
- ☐ **3. When you come to work each day, what do you look forward to?** (Take notes) **What do you NOT look forward to?** (Take notes)
- ☐ **4. Ask the following questions:**
  1. Can you name the 4 control models? (*Autocratic, Incentives, Judgement, Pampering.*) Name 3 ways they differ from a responsibility-based model. *Control relies on extrinsic motivation (vs. intrinsic motivation). Beliefs are limiting and negative (vs. faith in people). Outcomes were other-directed (vs. accountable).*
  2. What is connection between control models and inferiority complex? (*Control holds small, fearful beliefs about people and treats them poorly. This feeds the inferiority complex which feeds struggles*)
  3. Name at least 1 thing you remember about change blindness? (*a. people don't want to go out of their way to learn something new or b. they don't want to consider their thinking could be outdated*)
  4. What is "Spitting in Your Soup"? (*Taking something believed good/wholesome and making you see it is not.*)
  5. The good old days were based on win/lose dynamics between *those perceived to hold authority* and those perceived to be *rebellious*. This breeds fear, hostility, revenge, resentment and anger for which group? (*both*)
  6. You learned about the 4 stages to authentic team. Name as many as you can? (*1. Pseudo-community 2. Chaos 3. Empty 4. Authentic team*) Which stage should be skipped and which is often neglected and should not be?
  7. What's difference between a team vs. a working group? (*Team: you seek to make everyone wildly successful*)
  8. Name 1-3 steps in the frustration tool. Which one is often overlooked but matters the most (*Step 2 which is where the frustrated person shares their desires/wants/needs for self and with this person.*)
  9. Mentor: Read notes on firm and respectful video. Name at least one thing you learned from this video.
  10. What did you learn about encouragement from the Babemba story?
- ☐ **5. End with appreciation and thanks** for this employee. Make sure they receive it. (This should be one-way. They do not appreciate you)

## Notes (on firm and respectful video)

- Expectations remain high throughout
- The leader stays connected, compassionate and supportive
- No shaming, force, guilt or power are used despite size, age and position
- No rescue, exemption, enabling,
- Expressing feelings is encouraged, but not given undue notice or exempt one
- The leader *support* until an excellent outcome is realized
- Recognition and acknowledgment are warmly provided

**Note:** Make time to fill out the **mentoring data form** before and after this session. This helps you remember mentee's colors, concerns, solutions and your observations, including actions for follow-up.

# Mentoring Template Month 4

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in **orange** unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- Notes**
- ☐ **1. Express appreciation\***. Notice whether they receive it. (This should be one-way. They do not appreciate you)
  - ☐ **2.** Share briefly on your organization's **purpose and discuss one core value** (your core values are *not* the 8 values that build trust).
  - ☐ **3. What key reasons keep you in our organizations?** (Take notes)
  - ☐ **4. What might entice you to leave?** (Take notes)
  - ☐ **5. Ask the following questions:**
    1. What is the definition of intrinsic motivation? (loving what you do and who you are when you're doing it)
    2. What are the 4 intrinsic motivators (Sense of... 1. Meaningfulness, 2. Choice, 3. Competence, 4. Progress) Does the order matter. Whatever you answered, why? (Th order matters because they build upon one another)
    3. What is the difference between a task purpose and task activities? (purposes are the why, activities are the how)
    4. Name 1 of the 4 intrinsic motivators and identify the primary self-management activity and at least one area that needs to be considered and possibly addressed, when working on one of these to raise them for self and others (e.g. sense of meaningfulness. The primary management task is inspiration, and two areas to address are cynicism, having clear and inspiring visions)
    5. What is the 2<sup>nd</sup> intrinsic motivator (Sense of Choice) This motivator is often under-valued and under-addressed. What's one way for you to increase this motivator with someone in your life. (e.g. I gave my kids whole tasks like going as a team to the grocery store without the parents and managing the entire process. Another is that I create my workplace so people build trust and feel secure: They don't worry about punishment from me or their co-workers, which helps them build courage to try on and make new choices.)
    6. The 3<sup>rd</sup> intrinsic motivation is a sense of competence. Give an example of where you have felt this was lacking or you were not supported as you'd like. How did you cope? How would you now that you consider this question?
    7. What is the significance and importance of the 4<sup>th</sup> intrinsic motivator: a sense of progress? How does this help you and others regarding feelings of inferiority? The 4 core needs?
    8. Recognition is a behavior that builds trust and helps people see what they've done and why it matters. What's the best recent recognition you have received. What did it feel like and what does it bring you to recall it?
    9. Which intrinsic motivator, if strengthened in your life now, would bring you increased engagement in part of your life or work where you'd like more?
  - ☐ **6.** Ask this person, "what is a significant take-away you get from this information on intrinsic motivation? What is one or more action(s) can you take to continue to remember, build upon and live these motivators and their sub-steps?
  - ☐ **7.** End with **appreciation** and thanks for this employee. Make sure they receive it. (This should be one-way. They do not appreciate you.

**Note:** Make time to fill out the **mentoring data form** before and after each session. This helps you remember mentee's colors, concerns, solutions and your observations, including actions they commit to take.

# Mentoring Template Month 5

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in orange unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation.** Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2. Share briefly on your organization's purpose and discuss one core value** (your core values are not the 8 values that build trust).
- ☐ **3. How do you (personally) like to be recognized?**
- ☐ **4. Are you satisfied with the amount of recognition you receive?** (Take notes)
- ☐ **5. Ask the following questions:**
  - 1. Why is it crucial that trustworthiness be foundational to this new model? (Without trust people will be in protection and attack which leads to people defeating one another and the company)
  - 2. What is the social interest? (this is when we focus on the consequences our behavior has on other people.)
  - 3. What are the 4 healthy guidelines when you are speaking? (1. Honest, 2. caring, 3. harmony, and 4. useful. Useful is when a person checks in to see if the person you are talking with is open and receptive)
  - 4. What are the differences between encouragement and praise? (praise is bestowed from above and is more about how the person doing the praising feels and their judgements about a person. encouragement is observational and focused on the internal thoughts and feelings of the person who is receiving it).
  - 5. What did you learn about yourself from doing the empathy exercise in your workbook?
  - 6. Review the thermometer exercise \*see in notes Show them how you can use it with online or with paper and pen. Do it with them for just a few seconds.
  - 7. What are the 4 reasons we communicate? (1. Persuade, 2. Inform, 3. Self-Expression, 4. Pleasing)
  - 8. What are the 5 listening styles? (1. Appreciative, 2. Empathetic, 3. Comprehensive, 4. Discerning, 5. Evaluative)
  - 9. Why is it important to be aware of both the 4 reasons we speak and the 5 listening styles (These two things make us better listeners and talkers. When we see the reason another (or ourselves) are speaking, conversations become focused, concise and effective. We can help others to see their reasons too. When we recognize the 5 listening styles we can flex our listening to understand and meet people where they are with different values.
- ☐ **6. End with appreciation.**

## Notes

### \*Thermometer Exercise

1. Draw a line. Cooperating is on one end and Not cooperating is on other.
2. Identify center as neutral, placing cursor (if virtual) or pen or stylus (if live).
3. Let the person know you will not speak but rather, you will move forward, backward or stay in the same place.

Remember: The goal when using the thermometer is to recognize the influence you are having on others so you take greater responsibility for your outcomes rather than trying once or twice, then quitting. The question you ask is, "How did you get that result?" whether it is a positive, negative or neutral reply.

**Note:** Make time to fill out the **mentoring data form** before and after this session. This helps you remember mentee's colors, concerns, solutions and your observations, including actions for follow-up.

# Mentoring Template Month 6

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in orange unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation.** Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2. Share briefly on your organization's purpose and discuss one core value** (your core values are not the 8 values that build trust).
- ☐ **3. Ask the following questions:**
  1. Finish this sentence, "A misbehaving person is \_\_\_\_\_?" (discouraged)\*
  2. What is the definition of misbehavior? (any behavior NOT in alignment with the needs of the situation).
  3. Can you name 1- 4 presentations of misbehavior? \*\* Name as many as you can and what they are. Give an example of one type. (1. Active destructive, 2. Active constructive, 3. Passive destructive, 4. Passive constructive)
  4. Name as many of Adler's 5 concepts that you can. (1. We are **social** with 4 core needs, 2. We are **purposeful**; we are goal-oriented, 3. We are **self-determining**. We create our reality (iceberg model), 4. We are **subjective**. We create unique, individual *private logic* related to creating our beliefs and values, and 5. We are **holistic**; we attempt to get to a *felt-plus* in which we feel all 4 core needs and abundantly)
  5. What are the 5 different mistaken goals of negative behavior? Why are they called *mistaken*?
  6. What is Redirect? There are 3 parts (1. a technique to stop limited thinking and behaving based in fear/discouragement, 2. A method for diagnosing and treating causes of misbehavior, 3. A respectful honoring alternative to bribes, permissiveness and punishment.)
  7. How are we perceptually blind when it comes to negative behavior?
  8. What's the first step to redirecting? (notice how you feel) The second step? (notice how you think and react: sugar)
  9. What is giving the sugar? (the reaction you give that's permissive and supports a person's FEAR) What is upping the ante? (the reaction a misbehaving person gives when you redirect them; they try to confirm their belief based in fear/limitation)
- ☐ **4. End with appreciation.**

## Notes

\*They are not getting 4 needs met

### \*\*4 Presentations of Misbehavior

1. Active destructive: behavior destructive to property, persons, routines, relationships; it's overt
2. Active constructive: behavior that's destructive but appears positive, correct or constructive and is presented actively
3. Passive destructive: behavior in which a person passively does not meet the needs of a situation through inactivity and omission and is destructive to people or things.
4. Passive constructive: a form of inactivity and omission in such a way that it looks as if they are intending to be constructive or cooperative.

**Note:** Make time to fill out the **mentoring data form** before and after this session. This helps you remember mentee's colors, concerns, solutions and your observations, including actions for follow-up.



# Mentoring Template Month 7 and Beyond

**Instructions:** Bring company blueprint. Complete *General Summary Data Form* after session. Do not read answers in **orange** unless the person says they don't remember. Help with hints but don't spend too much time on any one either.

- ☐ **1. Express appreciation.** Notice whether they receive it. (This should be one-way. They do not appreciate you)
- ☐ **2.** Share briefly on your organization's **purpose and discuss one core value** (your core values are *not* 8 trust values).
- ☐ **3. Score all 3 of following areas** on a scale of 1-10: *Relationships, Productivity, Engagement* (below)

**A. Relationships:** "Are any less than a 10? How many? What scores?" (Do NOT allow names or stories)

Their assessment(s) and next steps

My assessment(s)

**B. Productivity:** Ask, "Is this less than a '10'? Take notes including scores and solutions.

Their assessment(s) and next steps

My assessment(s)

**C. Engagement:** Ask, "Is this less than a '10'? Take notes including scores and solutions.

Their assessment(s) and next steps

My assessment(s)

**For relationships less than a 10:** Ask, "What number do you assign each relationship?" If they choose to work on a relationship, have them just choose one of them. "Which trust values are YOU and THEY failing?" "What tool will solve one issue?" "Will you practice it now?" "When will you take action?"

8 Values That Build Trust	Description	You	Them
1. Honesty	Am I ethical? Do I tell the truth?		
2. Straightforwardness	Do I tell them what I want & expect?		
3. Receptivity	Am I fully open to their feedback & ideas?		
4. Disclosure	Do I share my opinions, needs, & feelings?		
5. Respect	Do I treat them as worthy & important?		
6. Recognition	Do I acknowledge gifts & differences appreciatively?		
7. Follow Through on Commitments	Do I deliver on what I say I'll do?		
8. Seeking Excellence	Am I determined to cause and be the best?		

If time remains due to positive scores above, take these steps:

- ☐ **4. Work on Blueprint:** Mentor- help them take next step. ☐ **5. Review/Practice Tools**
- ☐ **6.** End with **appreciation** and **thanks**. **Note:** Make sure they leave with an action plan. Take notes. Encourage!



# Explanation of the Strategic Alignment Survey

(by Integro Leadership Institute)

Employee alignment is critical. When employees are not aligned with the organization's goals and strategies, the right work does not get done... or it does not get done right. What many managers fail to realize is that if employees are not aligned with the organization's Purpose, Values and Vision, or have failed to establish their own intrinsic purposes for their daily work, they are very unlikely to be aligned with your goals, strategies and processes.

When employees feel connected to the purpose and vision of the organization, they have a clear understanding of how important the products and services you provide are to your customers and the community. They also see a clear connection between what they do and the success of your organization in fulfilling its purpose. As a result, aligned employees see their work as meaningful. They look forward to coming to work, and have a sense of pride in what they do and the organization they work for. When there is a high level of trust throughout the organization:

- Expectations are clear, disagreements are discussed and resolved and individual performance is discussed and agreed on without having to rely on a formal process.
- Information is exchanged freely as needed, feelings and opinions are openly discussed and people do not have hidden agendas.
- Differences are valued, employees feel respected for their contribution, and have input into how the organization can be more successful.
- People keep their commitments, strive for excellence in everything they do, and can count on each other for support.

This is a place where people want to work... a workplace based on trust and personal responsibility. The Strategic Alignment Survey measures four key areas that have an impact on employee alignment and engagement, and provides critical feedback across the organization. LifeWork Systems will collect, summarize and report on the four sections of this survey:

Section One – **Group Trust Level Report** – this section includes 16 questions/statements describing:

- The degree to which group members practice trust-building behaviors

Example 1: In our group, when people express their point of view, they feel truly listened to.

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Example 2: Group members are encouraged to share their feelings, regardless of whether they are positive or negative.

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Example 3: If there is conflict in our group it is handled in a straightforward and constructive manner.

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Section Two – **Group Alignment Report** – this section includes 23 questions/statements that describe:

- The degree to which group members are aligned with the organization's Purpose, Values, Vision, Goals, Procedures and Roles

Example 1: Our group is moving together in the same direction.

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Example 2: We operate by a clearly defined set of values.

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Example 3: Forms, reports and procurement methods are familiar to group members.

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# Strategic Alignment Survey (Continued)

Section Three - **Values That Build Trust** - this section has 8 categories describing:

- The 8 values that must be present for trust to develop (each asks these 2 questions)

Sample Value: Honesty - Having high standards of honesty in everything we do

Question 1: How important is this to you personally?

Question 2: How well does your organization operate by this value?

Section Four - **Kinds of People** - see descriptions in this section identifying the percentage of:

- Employees whose behavior is Self-Directed, Rebellious or Compliant

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## Section 1 - **The Group Trust Level Report**

This report will measure the degree to which each employee perceives that the four elements of trust are present in their work group. The elements of trust and the behaviors measured are:

1. **Congruence** - the degree to which employees (1) have clearly defined and agreed behavioral standards, (2) make sure expectations are clear, (3) are willing to discuss and resolve disagreements and (4) practice what they preach.
2. **Openness** - the degree to which employees (1) openly share information and opinions, (2) discuss feelings with one another, (3) do not withhold relevant information from one another, and (4) are comfortable receiving feedback from each other.
3. **Acceptance** - the degree to which employees (1) are really listened to, (2) are accepted for who they are, (3) feel it is safe to express conflicting views, and (4) encourage and support each other.
4. **Reliability** - the degree to which employees (1) can rely on each other to get the job done, (2) do what they say they will do, (3) take ownership of their jobs and, (4) have high standards of quality in everything they do.

Although it is common to get a spread of responses on each, there is usually a tendency for some consistency in group scores, so the elements that need most work can easily be identified.

The percentages for each element represent the raw scores from the questions asked compared to the maximum possible score.

- A score of 70% for Openness is saying that the total aggregate score for the team is 70% of what is possible, not that 70% of the team is open.
- There is no way of looking at the report and calculating this percentage.

Often, the most underrated element is acceptance. It is this element that creates the climate for the other three to increase. When team members feel that they are valued and respected, they are more comfortable being open and honest with each another.

## Key Questions:

- Which of the Elements of Trust are we best at and worst at?
- What are the factors that contribute to our strengths and areas we need to improve?
- What barriers need to be removed to increase the trust level on all four elements?

# Strategic Alignment Survey (Continued)

## Section 2 - The Group Alignment Report

This report is measuring two things:

**Clarity** - how clear each individual believes their work group is on the purpose, values, vision, goals, procedures and roles.

**Approval** - to what degree each employee approves of the purpose, values, vision, goals, procedures and roles.

### Clarity

It is important to understand the difference here between what we are measuring on clarity and approval. With clarity, we are measuring each employee's perception of how clear they believe their work group is, not how clear the individual is. When people are asked how clear they are, some individuals may not want to admit not being clear. By asking whether they perceive the group to be clear, we get a more accurate picture of clarity.

It is also possible that an individual, the team leader for example, may be very clear on the vision themselves, but believe that the team is very unclear about that vision.

### Approval

With approval, we are measuring the individual's personal approval. It is possible to have an individual that shows approval in a very unclear position on the report. This would tend to indicate that this person is clear about that item themselves, and approves of it, but believes that the team is very unclear.

The percentages for Team Clarity and Team Approval represent the raw scores from the questions asked compared to the maximum possible score.

- A score of 70% for Team Clarity is saying that the total aggregate score for the team is 70% of what is possible, not what percent of clarity.
- There is no way of looking at the report and calculating this percentage.
- That is also true of the approval scores... a person individually does not have to totally approve of each question so you can have a score of less than 100%

The main benefit of the Group Alignment Report is that you can see which of these key areas you need to focus on increasing clarity, and where there is a need for more approval.

### Key Questions:

- On which items is our group most in alignment?
- How well do we perform in these values?

# Strategic Alignment Survey (Continued)

## Section Three - 8 Values That Build Trust

Section One of this report looked at the Trust Building Behaviors in this group and this section measures the Values that must be present to drive the trust building behaviors. We have identified two values that need to be present for each of the four Elements of Trust.

The eight values are:

### Congruence

1. Straightforwardness: People are clear about what is expected of them
2. Honesty: Having high standards of honesty in everything we do

### Openness

3. Receptivity: Giving new ideas and methods a fair hearing
4. Disclosure: Communicating openly one's own ideas and opinions

### Acceptance

5. Respect: People are valued for who they are
6. Recognition: People get the recognition they deserve

### Reliability

7. Seeks Excellence: Striving to do our best in everything we do
8. Keeps Commitments: People follow through on their responsibilities

In the questionnaire employees are asked two questions about each of these values:

- How important is this to you personally?
- How well does your organization operate by this value?

Employees do not see the Elements of Trust or the name of the value, just the description.

**Reading the Graph:** Each of the eight values shows the average score on the first bar (on a scale of 1 to 10) of how important these values are to your employees. The second bar represents the average score for employees' perceptions of the organization's performance on each value. The column on the right shows the number of respondents who completed these questions. The **Trust Values Gap Score** in the box at the top of the page shows the sum of all of the gaps.

**Interpretation:** The difference between "personal importance" and "organizational performance" can have a significant impact on employee engagement and commitment. If employees indicate that these values are "important" to "very important" to them, and then rate the "organization's performance" significantly lower, they are saying is: "This is important to me but my organization doesn't operate this way."

### Key Questions:

- Which values are most important to our employees?
- What do we need to do to improve performance in these values?

# Strategic Alignment Survey (Continued)

## Section Four - Kinds of People

This section is measuring employees' perceptions of the behavior of their co-workers, based on the kinds of people described in our Personal Responsibility Model.

This model identifies three kinds of people:

Self-Directed people - those who are personally responsible, and two kinds of

Other-Directed people - those who tend to be Compliant, and those who are Rebellious.

The survey asks employees to respond to the following question:

What percentage of the people that you work with would fit each of the following three descriptions? Please ensure your total for all three equals 100%.

**Person 1** - Will not be told what to do; feels frustrated; feels entitled to better treatment; does the absolute bare minimum they have to do to keep their job; tends to blame others when things go wrong; this person is generally or frequently uncooperative or actively working against others, sometimes openly sabotaging; sometimes through action or inaction. **(Actively Disengaged/Rebellious)**

**Person 2** - Does what they are asked to do but does not feel much commitment to the tasks, or to the organization...it's just a job, a paycheck; sticks to the rules and stays out of trouble but is switched off and non-creative. **(Disengaged/Compliant)**

**Person 3** - Works intentionally with a strong commitment to their purpose; maintains a high level of engaged passion on the job. They're eager and willing, personally and intrinsically responsible for their performance, their relationships, and have strong self and social interest; they are open-minded, eager and willing to learn; and uses initiative and creativity to improve results. **(Fully Engaged/Self-Directed)**

**Reading the Graph:** The pie chart shows the average percentage of scores for the three descriptions, for all employees in this group that respond to the questions.

**Important Note:** While we have used the title "Kinds of People" for this section, we are really talking about how employees are currently behaving. It is important to understand that Rebellious and Compliant behaviors are natural responses from employees who perceive themselves to be in an Authoritarian environment. It is also possible for the same person to use all three types of behavior in one day.

This result is not a portrait of the employees in your group, merely a snapshot of how they were behaving at the time this survey was taken.

### Key Questions:

- How do you need your employees to behave to achieve your objectives?
- Is your present leadership approach going to allow your employees to be self-directed?
- What kind of culture do you need to create to attract and retain Self-Directed people, and get your currently Rebellious and Compliant people to behave in a self-directed way?

# Strategic Alignment Survey (Continued)

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## The Question Level Report

This report shows the distribution of answers for each question with both the numbers of employees at each point on the scales, and the percentage of the whole group that number represents.

The questions are listed on this report by item, making it easier to respond to questions others have about what is actually being measured. It also shows whether there is any significant difference in the spread of answers.

This report is provided for the organization as a whole, not for individual workgroups. Employees have been advised that their responses are confidential, and for smaller work groups it can become obvious that one employee has answered the questions differently from the rest of the group. This can lead to unnecessary and unhealthy speculation as to who this might be.

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## Summary

The **Strategic Alignment Survey** has a total of 73 questions that will be asked prior to implementation of a LifeWork Systems Leadership Development Process and again after all services are completed. The survey extensively measures four key areas that impact employee alignment and engagement, and will provide feedback critical for LifeWork Systems and you in developing an effective, comprehensive and customized leadership development plan for your organization.

The resulting process will be tailored to the specific areas needing improvement as well as to leverage and expand your organizations strengths and assets. The results of the initial survey provide a benchmark for the current state of trust and alignment and allow a comparison of post-service data to measure improvements.

## 7 Steps to Culture Change (Continued)

1. Make sure the CEO and Senior Team support the **transformation process**

2. **Benchmark** the existing culture to determine the starting point

3. Get all Senior Team members **"on the bus"** and develop a plan

3a. Senior team **believes in people** and has made a commitment to building **high trust** in teams and with all staff

3b. Senior team understands that one of the keys to building trust and personal responsibility is a **values-based culture**

3c. Senior team is committed to the organization's **purpose, values and visions** for creating a **responsibility-based culture**

3d. Senior team have adopted a **values-based** strategy to transform the culture

4. Ensure all Managers and Supervisors are **building trust** and creating an environment where people are **self-directed**

4a. Ensure all Managers and Supervisors have the **emotional intelligence** to build a **high level of trust** with their team members

4b. Develop their **coaching and counseling skills** and talk with their team members about their relationships and performance

4c. Ensure all staff are **included**, see their work as **meaningful** and how it contributes to the organization's success

4d. Develop team members' skills so they **take ownership** of ongoing improvement of their own performance

5. Create a **values-based culture**: all staff operate by the **values that build trust**

6. Give all staff opportunities to learn how to operate in **cross-functional teams**

7. Use **cross-functional teams** to redesign systems, processes and structures



## 7 Steps to Culture Change (Continued)

<div data-bbox="113 315 612 462"> <p><b>1. Make sure the CEO and Senior Team support the <i>transformation process</i></b></p> </div> <p><b>Bottom Line:</b> The entire senior executive team receives a high-level view of what's required, what they are transforming from and into, and commit fully to the transformational process and their roles within it.</p>	<p>CEO and Sr. Team steps</p> <ol style="list-style-type: none"> <li>1. LifeWork Systems shares survey results with client lead</li> <li>2. CEO shares need for culture project with senior team</li> <li>3. The senior team and CEO learn about change process and capacity building</li> <li>4. Senior team understands commitments and agrees</li> </ol> <p>Knowledge initially provided is high level</p> <ol style="list-style-type: none"> <li>1. 7 step process is reviewed by senior team and each understands process and commitments</li> <li>2. Responsibility-based vs. control-driven approaches are contrasted</li> <li>3. Engagement and the impacts of it on business results is understood</li> <li>4. Leaders learn their unique roles and responsibilities throughout and beyond initial project</li> <li>5. A leadership development process is reviewed and adopted</li> <li>6. A new model for the workplace culture is understood and accepted, including building a foundation of trustworthiness and distributing training for all staff.</li> </ol>
<div data-bbox="113 1102 604 1249"> <p><b>2. <i>Benchmark</i> the existing culture to determine the starting point</b></p> </div> <p><b>Bottom Line:</b> Benchmarks may encompass different areas of company culture (e.g. trust, alignment). Once a benchmark is established, then assessments are re-issued to measure improvement.</p>	<p>Benchmarking includes</p> <ol style="list-style-type: none"> <li>1. Strategic Alignment Surveys (SAS) for CEO, Senior Team, groups, departments or divisions, and/or the entire organization, initially and periodically after services have been delivered and skills implemented</li> <li>2. Ntrinsx surveys are provided for all to determine temperaments and to increase diversity awareness</li> <li>3. Performance targets are identified, tracking is in place, with reporting to leadership and LifeWork Systems</li> </ol>
<div data-bbox="113 1512 571 1659"> <p><b>3. Get all Senior Team members <i>"on the bus"</i> and develop a plan</b></p> </div> <p><b>Bottom Line:</b> The Senior Team designs a custom plan and develops a strategy for rolling it out. Each team member is aware of their obligations and is committed to the plan and their role in it. They <b>Regularly Benchmark</b></p>	<ol style="list-style-type: none"> <li>1. Layout the scope of work and make sure each senior team member understands all requirements and timelines. They agree to the schedule, roles, new tasks and in creating all deliverables of the process with their midlevel managers, supervisors and ultimately with the entire company or organization</li> </ol>



## 7 Steps to Culture Change (Continued)

<p><b>3a.</b> Senior team <b>believes in people</b> and has made a commitment to building <b>high trust</b> in teams and with all staff</p> <p><b>Bottom Line:</b> Senior team learns the skills, models them for others, oversees new practices and <b>walks the talk</b>, first with their peers, then with managers and supervisors, then with all employees.</p> <p><b>Note:</b> Every person is mentored monthly, no exceptions</p>	<p>Senior team becomes cohesiveness and engages in</p> <ul style="list-style-type: none"> <li>• Trust-building (until high levels of trust are in place)</li> <li>• Teambuilding</li> <li>• Effective communication</li> <li>• Mentoring</li> <li>• Blueprint building for alignment</li> <li>• Identifying performance targets and tracking them</li> <li>• Effective meetings</li> <li>• Tracking culture practices (e.g. training, mentoring)</li> </ul> <p>Senior team prepares to introduce all components and oversee midlevel management as everyone participates in</p> <ul style="list-style-type: none"> <li>• Distributive learning for all</li> <li>• Integration of core values and 8 values to build trust</li> <li>• Supporting group facilitators as they rotate monthly</li> <li>• Support through leadership development</li> <li>• Mentoring sessions by self and midlevel managers</li> </ul>
<p><b>3b.</b> Senior team understands that one of the keys to building trust and personal responsibility is a <b>values-based culture</b></p> <p><b>Bottom Line:</b> Senior team uses, lives by, decides by, designs by, hires by, fires by, orients by, the core values and the 8 values that build trust.</p>	<p>Senior team over-communicates blueprint and direction (purpose, values, visions, goals, procedures and roles) and further builds trust by</p> <ul style="list-style-type: none"> <li>• Making values operational in the workplace</li> <li>• Modeling new skills and practices themselves and talking about what's next</li> <li>• Setting up new hiring, firing, orientation protocols based on values of the culture and tracking adherence</li> </ul>
<p><b>3c.</b> Senior team is committed to the organization's <b>purpose, values and visions</b> for creating a <b>responsibility-based culture</b></p> <p><b>Bottom Line:</b> Transfer of responsibility to all for relationships, productivity and engagement is priority for senior leaders.</p>	<p>Senior team makes certain responsibility and accountability are happening</p> <ul style="list-style-type: none"> <li>• Building capacity for change with all staff</li> <li>• Reviewing commitments with all staff</li> <li>• Participation in all project and oversight activities</li> <li>• Mentoring some of the employees</li> <li>• Discuss, create and implement new processes</li> <li>• Manage teams and help them promote the values and vision of the organization on an ongoing basis</li> </ul>

## 7 Steps to Culture Change (Continued)

<p><b>3d.</b> Senior team have adopted a <i>values-based</i> strategy to transform the culture</p> <p><b>Bottom Line:</b> Implementation of values is a key focus for saturating the environment with values-based behaving</p>	<p>Senior team makes certain accountability is happening by</p> <ul style="list-style-type: none"> <li>• Ensuring all systems are purpose and value based, not profit and activity driven</li> <li>• Identifying future subject matter experts and leaders</li> <li>• Mentoring staff and involving them in change process</li> <li>• Building capacity for change with all employees</li> <li>• Hiring, firing and orientation policies are revised to be aligned with culture practices, purpose and values</li> </ul>
<p><b>4.</b> Ensure all Managers and Supervisors are <i>building trust</i> and creating an environment where people are <i>self-directed</i></p> <p><b>Bottom Line:</b> Managers and supervisors, who report to the senior team, are distributing skills, creating buy-in to the plan, and developing leaders at all levels.</p>	<p>Managers and Supervisors have taken initial training and are being mentored by senior team members. They are now</p> <ul style="list-style-type: none"> <li>• Reporting on status of work with direct reports</li> <li>• Demonstrating mastery of skills for improved relationships, productivity and engagement</li> <li>• Identifying and inviting staff members to become subject matter experts (SMEs) on the culture</li> <li>• Helping design and implement changes that reflect new culture and values</li> </ul>
<p><b>4a.</b> Ensure all Managers and Supervisors have the <i>emotional intelligence</i> to build a <i>high level of trust</i> with their team members</p> <p><b>Bottom Line:</b> Managers and supervisors, are walking the talk and modeling skills so their staff trusts their commitment and are willing and encouraged to do same.</p>	<p>Managers and Supervisors are now</p> <ul style="list-style-type: none"> <li>• Continuing to learn proficiency in use of skills</li> <li>• Continuing to receive mentoring</li> <li>• Evaluated and promoted on their ability to model EI and build trust</li> <li>• Practicing teambuilding skills with staff</li> <li>• Demonstrating knowledge and use of skills and tools</li> <li>• Hiring, firing and promoting based on emotional intelligence, trust and core values of culture in mind</li> </ul>
<p><b>4b.</b> Develop their <i>coaching and counseling skills</i> and talk with their team members about their relationships and performance</p> <p><b>Bottom Line:</b> Managers and Supervisors stop managing. They coach and model new behavior</p>	<p>Managers and Supervisors are now</p> <ul style="list-style-type: none"> <li>• Conducting group sessions with direct reports</li> <li>• Modeling and practicing skills with their direct reports</li> <li>• Mentoring staff</li> <li>• Using effective communication</li> <li>• Getting support from <i>their</i> mentors to build trust and resolve issues with team members</li> </ul>

## 7 Steps to Culture Change (Continued)

<p><b>4c.</b> Ensure all staff are <b>included</b>, see their work as <b>meaningful</b> and how it contributes to the organization's success</p> <p><b>Bottom Line:</b> Managers and Supervisors focus on developing leadership and intrinsic motivators.</p>	<p>Managers and Supervisors are now</p> <ul style="list-style-type: none"> <li>• Using encouragement strategies regularly including appreciative inquiry</li> <li>• Encouraging team by speak about contributions</li> <li>• Tracking and celebrating progress</li> <li>• Providing recognition for results related to vision, trust and values</li> </ul>
<p><b>4d.</b> Develop team members' skills so they <b>take ownership</b> of ongoing improvement of their own performance</p> <p><b>Bottom Line:</b> Managers and Supervisors conduct mentoring and lead and participate in group sessions to continuously measure and improve skills and personal responsibility in self and in all direct reports.</p>	<p>Managers and Supervisors are now</p> <ul style="list-style-type: none"> <li>• Inviting and providing opportunities to direct reports for demonstrations of leadership skills</li> <li>• Developing intrinsic motivation through delegation of whole tasks with encouragement and support</li> <li>• Spending time nurturing social and emotional intelligence skills</li> </ul>
<p><b>5.</b> Create a <b>values-based culture</b>: all staff operate by the <b>values that build trust</b></p> <p><b>Bottom Line:</b> All leaders are reinforcing new processes and aligning procedures such as how they hire, fire, onboard, and educate staff with values as they implement and integrate the new culture model.</p>	<p>All employees have been:</p> <ul style="list-style-type: none"> <li>• Provided the skills and processes in a fully distributive manner for changes in behavior and functioning</li> <li>• Onboarding new staff into the culture model</li> <li>• Every employee is mentored weekly or bi-weekly</li> <li>• Every employee is responsible for relationships, productivity and engagement.</li> <li>• Every employee understands it's not acceptable to operate outside of the 8 values that build trust or the core values identified by the organization as a whole.</li> <li>• Hiring and firing processes are related to the culture.</li> </ul>

## 7 Steps to Culture Change (Continued)

### 6. Give all staff opportunities to learn how to operate in *cross-functional teams*

**Bottom Line:** Senior executives, managers and supervisors all promote leadership skills by training staff in practicing leadership, collaboration, and teamwork in specific cross functioning events.

All employees are given the training and opportunities to practice cross-functional teamwork and exercise initiative, shared power and leadership:

- Opportunities to lead meetings
- Delegated whole tasks and work with related stakeholders within the company (at all levels and from a variety of disciplines and temperaments)
- Staff become skilled at the necessary behaviors and protocols for proactive creating, collaboration and cooperation events and projects
- Use of appreciative inquiry ensures productive teamwork

### 7. Use *cross-functional teams* to redesign systems, processes and structures

**Bottom Line:** The transformation process culminates as all stakeholders participate in redesigning elements of the organization so that the purpose, values and visions of the organization are reflected throughout.

Because all employees have been taught how to be self-motivated and emotionally and socially intelligent and effective in cross functional teamwork, together they are:

- Working in effective teams to examine and improve all business, customer service, internal culture, R&D, technology, HR, and any other system in order to promote ongoing improvements and excellence
- They create solutions to meet existing and future visions TOGETHER to accelerate effectiveness of their efforts.



# Systems Integration

This section answers the question, “*What do we do now that our initial introductory project is complete and we have a comprehensive, generalized understanding of the concepts and tools in this culture model and also have new hires joining our culture?*”

No matter when or how you were introduced to the LifeWork Systems model, you know that to be effective, your culture practices cannot remain intellectual nor be practiced temporarily. Rather they must be consistently maintained if responsibility and purpose-based behaviors are to be consistent. It’s easy to believe that once you have been exposed to information, it is the same as **implementing** the information in real-time application. It’s not.

Therefore, as a leader of your organization, it’s imperative you ensure your culture model is:

1. **Fully understood and committed to:** by all employees, including those who are NEW hires, and NOT *after* you have hired them, but as you vet them during interviewing, offering, and onboarding them.  
  
This includes a thorough review of the commitments required for joining your culture as described on pages 12-15 of this leader guide, and in their written *letter of intent*, as described on page 10 and filed in their record. They should bring that letter of commitment to their kickoff session and a copy should be sent to the CEO, the assigned mentor for this employee and their direct supervisor.
2. **Introduced:** properly to all NEW hires, (using Kickoff Group module) by an EXECUTIVE LEADER or LEADERS in their first month. This kickoff helps every NEW hire initially see and understand the priority commitment, reasons, game plan and intent of the culture from *top down*, as well as begin participating in all knowledge and behaviors expected in the culture system quickly.
3. **Mentored:** *every person every month*, for 30 minutes minimum, for all NEW and VETERAN employees. Mentoring of NEW people starts the first month of employment, alongside kickoff session. Use of mentoring templates and process is required, not optional.
4. **Trained:** ongoing and continuously, including:
  - **Individual Training for NEW employees:** It is recommended that NEW employees
    - engage in the entire *individual training* continuum from kickoff with an EXECUTIVE leader, with the help of an EMPLOYEE LEADER who has been assigned to partner with them for their *group* reviews and all initial *mentoring* sessions.
    - *Individual* training sessions should be paced to no less than two modules per month, and possibly on a weekly basis if the new hire and his or her employee leader can and want to increase the speed of introduction to the workplace culture basics inherent in the individual module, and without harm to workload requirements overall, to expedite exposure to all content in entire training continuum.
    - completing all post-surveys (required and tracked)

**Note:** EMPLOYEE LEADERS and their assigned NEW hires are exempt from the VETERAN *individual* training schedule, and large *group* sessions schedule, until the NEW hire has **graduated** through all initial *individual* and *group* training and *mentoring*. They both participate in this NEW hire track together

- **Individual Training for fully onboarded (VETERAN) employees:** Ongoing review of the entire *individual training* continuum repeatedly with rotational leadership of group sessions by all participants, is highly recommended:

## Systems Integration (Continued)

- at the original pace (two per month) or at a slower pace (not less than one per month) - see timeline of training each month, beginning on page 7
- including all workbook assignments and entries in their "It Just Got Real" forms
- completing all post-training surveys (required and tracked for accountability by mentors and managers)
- **Required post-individual-training surveys** on every set of two modules for NEW and VETERAN employees, because this demonstrates:
  - proof of completion after every two modules
  - what has been understood in the content
  - if and what they find relevant in the content and why
  - how they can and will apply content learned in their work (and personal) lives.
- **Group Training/Review for NEW employees:** It is recommended that all NEW employees are:
  - led through the entire life-cycle of the original training series with an employee leader(s), alone or in onboarding groups every month in parallel with their individual training track.
  - do NOT join VETERAN group training sessions until they have completed their initial introduction to the entire series of training modules. Upon completion, they are integrated into whatever individual and group training pattern has been adopted for ongoing review and new application of concepts and tools for VETERANS.

**Note:** Again, EMPLOYEE LEADER, and their NEW hires, are exempt from VETERAN large *group* review sessions until the NEW hire has graduated through all of initial *individual* and *group* training and mentoring periods. In this way, no one is going through more than one track each month. They both participate in this NEW employee track together.

All employees rotate leadership of the group sessions.

- **Group Training/Review for VETERAN employees:** In many companies, this is handled as
  - use original pacing (two individual modules, one survey and one 90-minute group session each month) and for some, they have
  - use new pacing (one individual module, half of a group module and review session for 45 minutes) every month and one post-individual-training survey every other month.
  - ongoing and continuous,

Our recommendation is the continuum of training is ongoing, repeated, with new modules integrated as they are developed and introduced by LifeWork Systems.

All employees rotate leadership of the group sessions

### 5. **Tracking:** ongoing and continuously, including every employee (NEW or VETERAN)

- **Create a plan:** a training and mentoring timeline and plan that has been approved
- **Provide a copy** to approved plan to direct supervisor or manager and mentor.

## Systems Integration (Continued)

**Note:** This is one way to instill accountability and consistency in practices and support, into the organization, for long-term sustained and continuous mastery and overall operational improvements and exposure to what has been learned initially and how it will be maintained. In this way, a supervisor or manager is responsible to manage ownership for this plan and its implementation.

6. **Sustained:** All employees will be provided:

- **Phone apps**
- **Audio versions**
- **Tool reference guide booklet**
- **Binder with all downloadable materials and dividers**
- **Ongoing training**
- **Opportunity to lead and follow both** (in group training leader rotation and elsewhere)
- **A mentor or mentors**
- **Trust gap scores every 6 months**
- **A customized intranet dashboard** with all the culture surveys, tools, profiles and mentoring tracking to share new articles, videos, quotes and more, to celebrate progress, share blueprints, track all activities and plans and in many other ways, maintain new processes and practices