

Fail to Plan = Plan to Fail: Creating Your Blueprint



Participate
Perform
Produce

Workbook

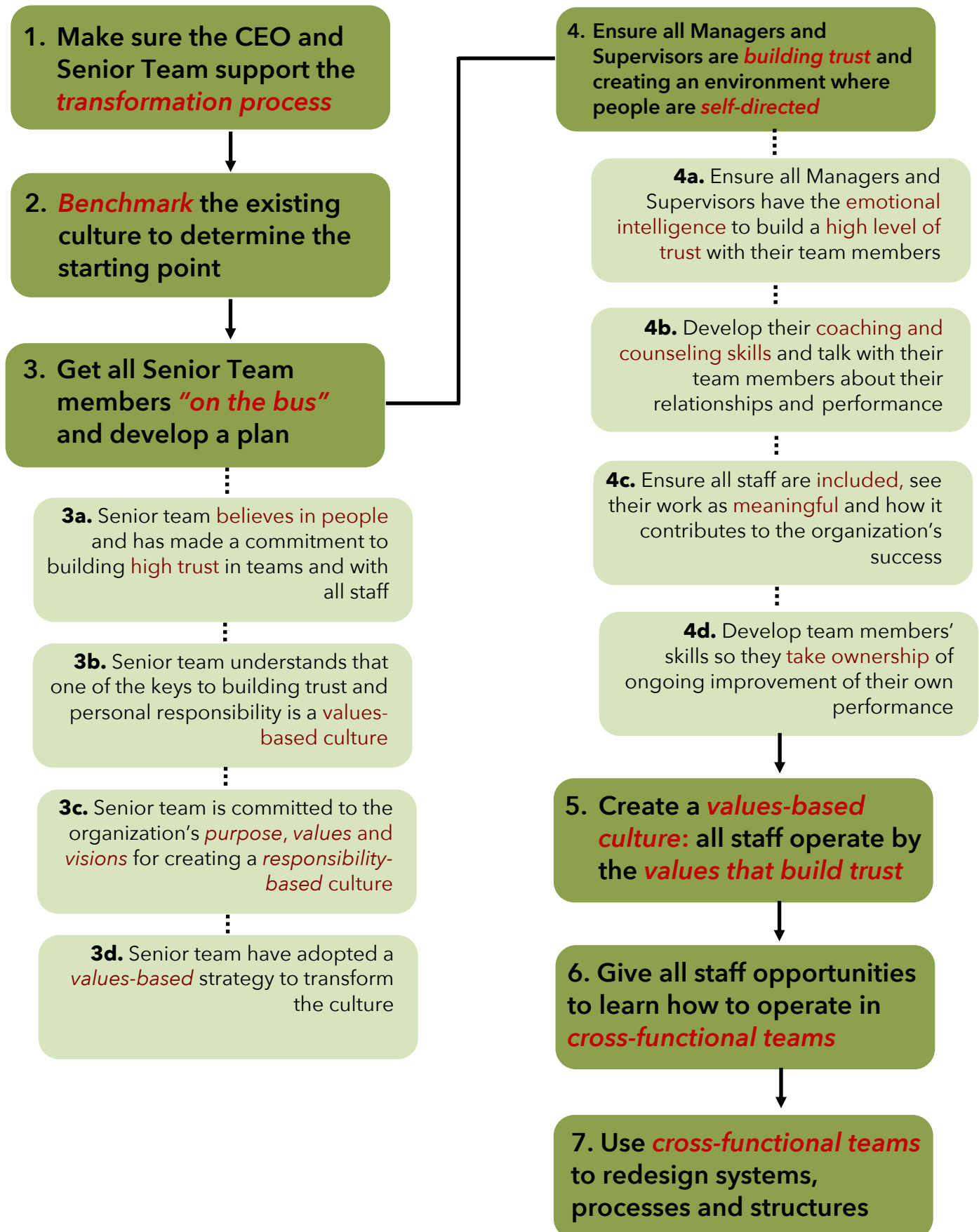
This workbook accompanies Individual Session 1 in the
eLearning Series, *CultureEX™ Guided Transformation Process*.

Presented for you by



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7 Steps to Culture Transformation



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

Bottom Line: 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.

CEO and Sr. Team steps

1. LifeWork Systems shares survey results with client lead
2. CEO shares need for culture project with senior team
3. The senior team and CEO learn about change process and capacity building
4. Senior team understands commitments and agrees

Knowledge initially provided is high level

1. 7 step process is reviewed by senior team and each understands process and commitments
2. Responsibility-based vs. control-driven approaches are contrasted
3. Engagement and the impacts of it on business results is understood
4. Leaders learn their unique roles and responsibilities throughout and beyond initial project
5. A leadership development process is reviewed and adopted
6. A new model for the workplace culture is understood and accepted, including building a foundation of trustworthiness and distributing training for all staff.

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

Bottom Line: 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.

Benchmarking includes

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
2. Ntrinx surveys are provided for all to determine temperaments and to increase diversity awareness
3. Performance targets are identified, tracking is in place, with reporting to leadership and LifeWork Systems

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

Bottom Line: 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 **Regularly Benchmark**

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

<p>3a. Senior team believes in people and has made a commitment to building high trust in teams and with all staff</p> <p>Bottom Line: Senior team learns the skills, models them for others, oversees new practices and walks the talk, first with their peers, then with managers and supervisors, then with all employees.</p> <p>Note: Every person is mentored monthly, no exceptions</p>	<p>Senior team becomes cohesiveness and engages in</p> <ul style="list-style-type: none"> • Trust-building (until high levels of trust are in place) • Teambuilding • Effective communication • Mentoring • Blueprint building for alignment • Identifying performance targets and tracking them • Effective meetings • Tracking culture practices (e.g. training, mentoring) <p>Senior team prepares to introduce all components and oversee midlevel management as everyone participates in</p> <ul style="list-style-type: none"> • Distributive learning for all • Integration of core values and 8 values to build trust • Supporting group facilitators as they rotate monthly • Support through leadership development • Mentoring sessions by self and midlevel managers
<p>3b. Senior team understands that one of the keys to building trust and personal responsibility is a values-based culture</p> <p>Bottom Line: 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"> • Making values operational in the workplace • Modeling new skills and practices themselves and talking about what's next • Setting up new hiring, firing, orientation protocols based on values of the culture and tracking adherence
<p>3c. Senior team is committed to the organization's purpose, values and visions for creating a responsibility-based culture</p> <p>Bottom Line: 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"> • Building capacity for change with all staff • Reviewing commitments with all staff • Participation in all project and oversight activities • Mentoring some of the employees • Discuss, create and implement new processes • Manage teams and help them promote the values and vision of the organization on an ongoing basis
<p>3d. Senior team have adopted a values-based strategy to transform the culture</p> <p>Bottom Line: 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"> • Ensuring all systems are purpose and value based, not profit and activity driven • Identifying future subject matter experts and leaders • Mentoring staff and involving them in change process • Building capacity for change with all employees • Hiring, firing and orientation policies are revised to be aligned with culture practices, purpose and values

<p>4. Ensure all Managers and Supervisors are <i>building trust</i> and creating an environment where people are <i>self-directed</i></p> <p>Bottom Line: 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"> • Reporting on status of work with direct reports • Demonstrating mastery of skills for improved relationships, productivity and engagement • Identifying and inviting staff members to become subject matter experts (SMEs) on the culture • Helping design and implement changes that reflect new culture and values
<p>4a. 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>Bottom Line: 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"> • Continuing to learn proficiency in use of skills • Continuing to receive mentoring • Evaluated and promoted on their ability to model EI and build trust • Practicing teambuilding skills with staff • Demonstrating knowledge and use of skills and tools • Hiring, firing and promoting based on emotional intelligence, trust and core values of culture in mind
<p>4b. Develop their <i>coaching and counseling skills</i> and talk with their team members about their relationships and performance</p> <p>Bottom Line: 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"> • Conducting group sessions with direct reports • Modeling and practicing skills with their direct reports • Mentoring staff • Using effective communication • Getting support from <i>their</i> mentors to build trust and resolve issues with team members
<p>4c. Ensure all staff are <i>included</i>, see their work as <i>meaningful</i> and how it contributes to the organization's success</p> <p>Bottom Line: Managers and Supervisors focus on developing leadership and intrinsic motivators.</p>	<p>Managers and Supervisors are now</p> <ul style="list-style-type: none"> • Using encouragement strategies regularly including appreciative inquiry • Encouraging team by speak about contributions • Tracking and celebrating progress • Providing recognition for results related to vision, trust and values

<p>4d. Develop team members' skills so they <i>take ownership</i> of ongoing improvement of their own performance</p> <p>Bottom Line: 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"> • Inviting and providing opportunities to direct reports for demonstrations of leadership skills • Developing intrinsic motivation through delegation of whole tasks with encouragement and support • Spending time nurturing social and emotional intelligence skills
<p>5. Create a <i>values-based culture</i>: all staff operate by the <i>values that build trust</i></p> <p>Bottom Line: 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"> • Provided the skills and processes in a fully distributive manner for changes in behavior and functioning • Onboarding new staff into the culture model • Every employee is mentored weekly or bi-weekly • Every employee is responsible for relationships, productivity and engagement. • 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. • Hiring and firing processes are related to the culture.
<p>6. Give all staff opportunities to learn how to operate in <i>cross-functional teams</i></p> <p>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.</p>	<p>All employees are given the training and opportunities to practice cross-functional teamwork and exercise initiative, shared power and leadership:</p> <ul style="list-style-type: none"> • 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
<p>7. Use <i>cross-functional teams</i> to redesign systems, processes and structures</p> <p>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.</p>	<p>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:</p> <ul style="list-style-type: none"> • 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.

Fill out your answers to the following questions. They will be discussed at your next *group* session.

For Reflection and Practical Application

1. **Step 4** is about everyone becoming *self-directed*. At LifeWork Systems, we often see a lot of resistance by some individuals to adopting personal responsibility especially in this session as each learns the blueprint process and chooses his or her purpose and values. Why might the development of leadership, purposefulness and values within a person sometimes be challenging and fear-inducing? Where are you personally regarding creation of your own blueprint and why?
2. **Step 5** is about *all* employees co-creating a values-based workplace culture and keeping it front and center now and later. What is one operational idea you have to help make sure this is being done for us and for new employees?
3. **Step 6** is about getting plenty of opportunities to function as both a follower and a leader in any given moment, no matter what your title or role. What barriers do you face to functional teamwork? What will personally help you to become stronger at collaborating and also at either leading or following, as needed?
4. **Step 7** is about participating in group problem solving because you have specific knowledge, talents and gifts to contribute. What thoughts and behaviors will help you become proactive in taking initiative? What helps you use your personal power with full engagement, without fear or hesitation?

How Do I Clarify My PURPOSE?

1. Think of three memories that stand out in which you felt the most alive, the most connected, and/or most fulfilled. **Note:** Do not generalize (e.g. “when I had each of my children”) but rather seek *a specific moment in time* in which you felt a heightened sense of rightness, awe, exuberance, stillness, or anything meaningful regarding the experience you remember.
 - 1.
 - 2.
 - 3.
2. What is common in all three memories?
3. What were you *doing, deciding, causing*?
4. If you could describe in one word, a few words, or a short phrase, what would you want on your tombstone (your lasting **legacy** and **reputation**)? My purpose is:

How Do I Clarify My VALUES?

1. Re-write your **Purpose** statement here. My Purpose is:
2. Think about what you are *doing* and how you are *being* when you are *causing* your **purpose** (e.g. daily, spiritual practice, thinking gratitude, being patient). Write values here:

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

These are at least some of your **values**...the means for accomplishing your purpose, *causing* your legacy. Write and circle at least three or four of all these values that best support your **purpose**.

3. Think about what you are *doing* or how you are *being* when you are **blocked** from *causing* your purpose (e.g. procrastinating, complaining, blaming). Now, think of the opposite of these behaviors. This will help you unearth more possible values.

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

Value: _____

These are at least some of your **value blockers**...these keep you from accomplishing your purpose or *causing* your legacy. Write and circle *at least* three or four of all these value blockers and the opposite values that will help you overcome them and support your **purpose** instead.

How Do I Clarify My VISIONS?

1. Re-write your **Purpose** statement here. My Purpose is:
2. **Vision Statement:** Think about several ways you want to *express* your purpose at this time; what do you envision specifically in the next six months or year. For example: I have a highly fulfilling career. Several possible vision *statements* for you are:

Vision 1:

Vision 2:

Vision 3:

3. **Your First Vision:** Choose at least one of the vision statements above and fill in these details:

Vision # _____

Why this vision? (how does it tie into and help you express your purpose?
Because...

My **results:** (Outcomes you are witnessing. What your story is when it's fulfilled; it does **not** include *how*)

My **feelings** (when this vision has occurred):

How Do I Clarify My GOALS, PROCEDURES AND ROLES?

1. Re-write your **Purpose** statement here. My Purpose is:
2. Pick key concepts from your *expanded Vision statement* on the previous page and any that might need goals that fit with the results from that vision. My Vision is:

Note: I usually underline or highlight sentences in my vision that require goals that are set next.

3. Define one **SMART** goal (**S**pecific, **M**easurable, **A**ctionable, **R**esponsible and **T**ime- **B**ound). One of my goals is:

What? _____

By When? _____

How Many? (If applicable) _____

My Strategy

My **Procedures** are: _____ Role: _____

_____ Role: _____

_____ Role: _____

_____ Role: _____

My Support **Witness** is

COMMITMENT

*Until one is committed, there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative (and creation), there is one elementary truth—the ignorance of which kills countless ideas and splendid plans: that **the moment one definitely commits oneself, then Providence moves, too.** All sorts of things occur to help one that would never otherwise have occurred. A whole stream of events, issues from the decision, raising in one's favor all manner of unforeseen incidents and meetings and material assistance, which no man could have dreamed would have come his way.*

Whatever you can do, or dream you can, begin it. Boldness has genius, power and magic in it. Begin it now.

Goethe

Creating Your Blueprint for Alignment

There are six areas in which you need to gain alignment if everyone is going to be fully engaged, committed and cooperative. Everyone must have clarity about what direction they are going and what they can do now (and each step along the way) to help get there. The six areas are:

- | | |
|----------------------|--|
| 1. Purpose | Why we exist. . . our purpose, the reason we exist |
| 2. Values | How we operate. . . our standards of <i>behavior</i> and <i>being</i> |
| 3. Vision(s) | What we choose to do now in order to fulfill (<i>express</i>) our purpose |
| 4. Goals | What we do in the short term to achieve our Vision(s) |
| 5. Procedures | Steps we take <i>specifically</i> , to achieve our goals |
| 6. Roles | Who is responsible for completing steps and achieving goals |

You are provided an excel spreadsheet (shown below) to first capture your purpose, values and visions first. There is a 2nd tab (pictured further down) for you to use for your goals, procedures and roles within each vision. **Note:** I usually underline or highlight sentences in my vision (after fully written) I identify that will require goals I set for each.

Name of person/organization:			
Purpose: What we commit to <u>cause</u> (for all)			
Note: A purpose is short, memorable, for everyone, including you , something that can be pictured, and is <u>not</u> based on circumstances			
A good example: "My purpose is to create a world in which all people love their lives."			
My purpose is...			
Core Values: What we <u>do</u> , how we <u>behave</u> , and what we <u>become</u> to <u>cause</u> our purpose			
Core values are <u>servants</u> to purpose; they support its fulfillment			
Note: Additional values can and should be added to this list or modified to support <i>causing</i> one's purpose			
1		5	
2		6	
3		7	
4		8	
The 8 Values That Build Trust			
Note: These 8 values are foundational to all relationships and organizations and are always included in all blueprints			
1. Straightforwardness (Asking for what is wanted and stating expectations directly and clearly) 2. Receptivity (Being open to feedback and ideas offered by others; listening with an open mind and heart) 3. Honesty (Being ethical: NOT lying, cheating, or stealing, etc.) 4. Disclosure (Sharing opinions, needs, ideas, conditions and feelings openly) 5. Respect (Treating others as worthy; not as objects for one's benefit and for transactions) 6. Recognition (Acknowledging with appreciation the gifts, talents, and differences in others) 7. Seeks excellence (Intent of delivering and doing one's best in all things; all tasks, relationships, and outcomes) 8. Follow-through on commitments (Delivering on what (and when) one commits)			
Visions: Ways we <i>express</i> purpose in the immediate future or next 1-3 (or more) years			
Note: There can be multiple visions and they can be personal or professional. They must align with purpose and values			
1	Vision statement 1 (as if it has already occurred):		
WHY	Why should explain how your vision aligns to your purpose and core values. This vision aligns with my purpose because...		
RESULTS	Results tell the happy story of your vision as if it has already occurred. Results do NOT include <u>how</u> the vision has been accomplished. Think of what you want, not necessarily only what you believe is likely or possible (within reason). Expand this cell as needed. Pretend you are telling this story to a good friend! Only when you have completed your results below, underline words or phrases to focus on for goals on sheet 2. Hey, let me tell you my good news...		
FEELINGS	Feelings should be <i>emotion</i> words only, describing what you feel when imagining the vision fulfilled. Do not explain or justify the feelings. (e.g., "My feelings are excited, joyful, proud, loved, loving, peaceful, etc."). That's all. My feelings are...		

See this 2nd page tab below. You start by listing your purpose and one vision statement. Then you start to fill in S.M.A.R.T goals (they are **Specific, Measurable, Achievable, Reasonable** and **Timebound**). *Roles* come last because it is not until you get all of your procedures laid out that you recognize the amount of work in each goal. Often, this is one way to avoid over-loading a coworker and determining who or how else these tasks can be delegated and accomplished.

[illegible]

Statements from the Jim Carrey Video

The video speech by Jim Carrey provides excellent examples of purpose, values, and visions. **Consider his words and choose three (or more) statements about which you write how they impact you and what they mean for YOUR life.** (you will be asked to share reflections you write on 3 or more of these on page 16 below, at your next group session):

1. "I'm here to plant a seed today; a seed that will inspire you to move forward in life with enthusiastic hearts and a clear sense of wholeness. The question is 'will that seed have a chance to take root?'"
2. "Fear is going to be a player in your life. You get to decide how much." "Many of us choose fear disguised as practicality." Jim's dad chose a 'safe' job as an accountant when he could have been a comedian. He ended up losing that 'safe' job. "You can fail at what you don't want so you might as well take a chance at doing what you love."
3. At 28 he "realized the purpose of his life had *always been* to free people from concern; help them to relax and present their best selves wherever he goes."
4. "What does the world need that your talent can provide?"
5. "I had arrived at the top of the mountain and the only one I hadn't freed was myself."
6. "Who would I be without my fame? If I said things people didn't want to hear or if I defied expectations?"
7. "That peace we're after lies beyond personality, beyond perceptions of others, beyond invention and disguise and beyond effort itself. To find real peace you have to let the armor go."
8. "Your need for acceptance can make you invisible in this world."
9. Don't let anything stand in the way of the light that shines through this form. Risk being seen in all of your glory (that's when he shows the picture *High Visibility*) "Some crazy characters up there but better up there than in here."
10. "We are not the avatars we create. We are not the pictures on the film stock. We are the light that shines through. All else is smoke and mirrors, *distracting but not truly compelling*."
11. "I wish people could realize all their dreams and hopes of wealth and fame so that they can see that's not where they're going to find a sense of completion."
12. "I came to realize there is nothing bigger than myself. My soul is not contained within the limits of my body. My body is contained within the limitless of my soul."
13. "You won't be feeling the world. You'll be felt by it."
14. "I have a reset button and I ride it all the time."
15. "The imagination is always manufacturing scenarios, both good and bad and the ego tries to keep you trapped in the multiplex of the mind. Our eyes are not viewers. They are also projectors that are running a second story over the picture we see in front of us all the time. Fear is writing that script and the working title is 'I'll never be enough.'"
16. "If you listen to the voice of the ego, you will always find someone doing better than you. Ego will not let you rest."
17. "How tricky is this ego that it would tempt us with a promise of something *we already possess*?"
18. "Let the universe know what you want and work toward it while letting go of HOW it comes to pass. Your job is not to figure out HOW, but to open the door in your head and when the door opens in real life, just walk through it."
19. "I say, 'Life doesn't happen to you. It happens for you.' I don't know if that's true. I'm just *making a conscious choice to perceive challenges as something beneficial* so that I can deal with them in the most productive way."
20. "Why not take a chance on faith? Not religion. Not hope. Hope is a beggar. Hope walks through fire. Faith leaps over it."
21. "You only always have two choices. Love or fear. Choose love and don't ever let fear turn you against your playful heart."

Your Reflections from viewing Jim Carrey Video

Three (or more) statements I am writing about below have inspired and educated me on purpose, values, and visions in a specific manner relevant to myself. Here are my reflections:

1. Number _____. I chose this statement to write about because...

2. Number _____. I chose this statement to write about because...

3. Number _____. I chose this statement to write about because...

4. Number _____. I chose this statement to write about because...

It Just Got Real!

Name _____

Date _____

A-Ha Idea

Challenges or Barriers

Resources (how will you overcome challenges or barriers?)

1

Next Step

Date

A-Ha Idea

Challenges or Barriers

Resources (how will you overcome challenges or barriers?)

2

Next Step

Date