

**FOUNDATIONAL  
LEADERSHIP  
WORKSHOP TWO**

# FOUNDATIONAL LEADERSHIP

## WORKSHOP TWO

Category	Learning objective	Focus on:
Communication	Cascade and translate into relatable terms any company-wide messages, as and when they occur	Us
	Select and use the most appropriate communication tools and channels for the message and context	It
Working with Others	*Coach self and team members through conflict to arrive at mutually agreeable solutions	Me/Us
	*Delegate responsibilities in a way that capitalizes on the strengths of others and fosters role clarity	Us
	*Respond appropriately to verbal and non-verbal emotional cues in order to create a safe, collaborative environment.	Us
Managing Direct Reports	Use various recognition methods to motivate and engage, through suitable channels	Us
	Create structure, systems, and behaviors (based on current theory) that will motivate and engage direct reports.	Us
	*Hold development conversations in a non-directive manner, and identify and appropriately address team members' development needs	Us
	*Understand the policies and follow the processes required to hire, performance manage, and develop the team, using the internal systems'.	Us/It
Understanding the Business	Clearly articulate a definition of our customer journey and what customer focus means at CDK	It
	Proactively gather external and internal customer feedback and insights, and use them to identify and develop service / customer experience improvement opportunities	It

\* LO covered in multiple workshops

## POST-WORKSHOP LEARNING:

Category	Learning objective	Focus on:
Personal	Manage your time effectively to prioritize high-impact tasks that help drive your team's performance	Me

## Agenda

Day 1	Day 2
WELCOME AND INTRODUCTION	WELCOME
Engagement & Recognition	Emotional Intelligence Challenging Conversations (part 1)
BREAK	BREAK
Engagement & Recognition	Challenging Conversations (part 1)
Customer Insights	
LUNCH	LUNCH
Customer Insights	Coaching
BREAK	BREAK
Communication Methods	Coaching
1:1 Communication	
CLOSE	CLOSE

# WELCOME

Welcome back to the second workshop of the Foundational Leadership Program. Over the last few months, you will have been applying and demonstrating your learning against the development goals you built following workshop one.

As a developing leader, it is important to understand how your learning is impacting those around you. Remember that letting your direct reports, line manager and peers know the areas you are trying to improve will help them to provide detailed feedback on your progress. Gathering evidence of your progress through feedback from others is an essential step towards achieving your leadership goals and leading your team.

Following this workshop, we will be asking you to continue to grow your leadership skills by building development goals linked to the learning you will cover over the next two days.

## REVIEW

### APPLY

Tell others about the development goals you set for yourself to apply the new skills, knowledge and behaviors you learned from workshop 1.

### DEMONSTRATE

What are the  
three most  
surprising  
things you  
learned?



What have  
you done  
differently?



What feedback  
have you had?

A large, empty rectangular box with a thin black border, designed for users to write their feedback notes in.

# EMPLOYEE ENGAGEMENT

## LEARN

As a leader, your performance is also reflected in the performance of your team. Whether your team performs well is highly dependent on how engaged they are with the organization, the team they work with and the work they do. Leading high-performing, engaged team means that your employees will work with passion, drive innovation and move the organizational goals forward.

### Employee Engagement Worldwide

Engaged organizations and employees are drivers of performance, profitability and long-term growth. As a leader, understanding the definitions and impacts of engagement can be crucial to your and your team's development.

**Engaged organizations** put a focus on communicating a vision to their employees that is inspiring and simple to follow, encouraging two way feedback, building positive and effective working relationships, and instilling a culture of high organizational integrity,

**Engaged employees** work with a passionate spirit, feel personally connected to the organizational vision, and are willing to work above and beyond their role or job specificity. They often are the enablers of innovations and drive progress for the organization.

### Employees can be usually put into three categories of in terms of their level of engagement:

#### Engaged

These types of employees feel valued at the organization and work with a sense of enthusiasm. They are motivated to see the organization succeed and often take on projects or additional work to prove innovation or improvement within the organization.

#### Non Engaged

These employees are more focused on putting in their time, but may lack enthusiasm for the work they perform. They may feel that they are not in the right role or that their skills are beyond the current role they are in. Without intervention or support from leadership, non-engaged employees are in danger of moving into an actively disengaged mentality.

#### Actively Disengaged

These employees may be unhappy at work. They may be actively displaying this emotion to their coworkers and distracting others from their jobs. They may also dominate a managers time with complaints, meetings, and a heightened display of conflicts with others. When working with customers, actively disengaged employees will often perform the minimum service or actions, and will not align with or display the organization values as they serve the customer.

# EMPLOYEE ENGAGEMENT

Gallup, an organization that provides analytics and advice to leaders and organizations, conducted two surveys around employee engagement in 2013 and 2016.<sup>1,2</sup> These surveys looked at highly engaged organizations and measured the value their employees brought to the workplace. The results showed that companies with highly engaged workforces outperform their peers by 147 percent.<sup>1</sup> The effects of highly engaged organizations can ultimately be seen in the bottom line results. A 2016 survey showed that these businesses outperformed others in customer loyalty/engagement, profitability and productivity.<sup>2</sup>

The surveys also revealed that around 13 percent of workers within the Global workforce are highly engaged at work, meaning that they are emotionally invested in the organization and focused on creating value. On the other hand, they also found that actively disengaged workers (those who feel negative and possibly hostile emotions towards their employer) outnumber engaged employees by almost 2:1.<sup>1</sup>

Looking at the rates of actively disengaged employees and the value that highly engaged employees bring to an organization emphasizes the potential in today's workforce to get better results simply by focusing on employee engagement.<sup>2</sup>

Sources – 1. State of the Global Workplace Report 2013 – Employee Insight for Business Leaders Worldwide – Gallup. 2. The relationship between Engagement at Work and Organisational Outcomes 2016 Q12 Meta-Analysis: Ninth Edition - Gallup



At CDK Global, we define employee engagement as:

*"The emotional commitment an employee has to their organization and its goals, and the willingness to apply additional effort to their work."*

We know that focusing attention on employee engagement will lead us to be more successful. Each year, we measure the engagement of our organization through the myVoice survey, which helps us to understand employee sentiment at a specific point in time. The survey results are helpful for leaders to understand specific areas of engagement and disengagement to build action plans.

Action planning and addressing employee engagement should then be a continuous activity throughout the year. One of the biggest mistakes we can make is to focus only on the survey results once a year and say "we have completed our engagement needs for the year". The true impact on engagement comes from the behaviors and actions we take as leaders on a day-to-day basis.

# EMPLOYEE ENGAGEMENT

## Creating an Engaged Workforce

As a leader, you have a key influence on the engagement of your direct reports. The decisions that you make, the way you distribute work and how you communicate with your team are all factors that can impact employee engagement.

There are three steps to creating and maintaining engagement within your team. Firstly, we need to ensure that we are **enabling engagement**. Secondly, we need to create an environment that turns **engagement into performance**. Lastly, leaders should be continuously **measuring engagement** of their team to understand whether they are effectively applying engagement principles to produce high performance.

Leading a team of people means that you are responsible for creating an environment that enables engagement, which transforms that engagement into high performance.

LEARN

### Step One: Enabling Engagement

Within any organization, the experience that employees have in the workplace environment impacts how engaged they feel. As a leader, you can positively influence this experience for your direct reports and create an environment that enables engagement to increase employee's emotional commitment to the business.

There are four things that the organization should be focused on to enable engagement. We call these items the four pillars of engagement.

### The Four Pillars of Engagement



**Senior Leadership**  
that creates a vision we want to follow



**Management**  
who manage people, not tasks



**Employee Voice**  
encouraging a two-way conversation with our business



**Organizational Integrity**  
An organization that does what it says

#### The Leadership Pillar

The leadership pillar links heavily to the strategy and direction of the organization. Engagement is created when senior leaders take the high level aims of the business and translate that into a compelling vision for the future that people want to follow.

A compelling vision is both intellectually sound with a strong emotional appeal that people can connect with. When a vision for the future has both of these things it helps employees understand direction and commit to the long-term goals of the organization.

# EMPLOYEE ENGAGEMENT

## The Management Pillar

In this context, management means building positive and effective working relationships with their direct reports. Managers take the time necessary to provide employees with a sense of trust and stability in the way they choose to lead. Building effective relationships means that managers know and play up to the strengths of their teams and actively assist them in developing the skills most necessary for organizational success. It does not mean task management, resource allocation or becoming close, personal friends with each of your direct reports either.

Building positive and effective working relationships involves:

- Appreciating the differences between your direct reports and supporting them accordingly
- Understanding and guiding each individual's development goals and desired career path
- Providing effective, regular feedback and recognition

## The Employee Voice Pillar

Employee voice means ensuring that your employees feel like their ideas and opinions matter. When an employee feels comfortable giving feedback and can see changes in the organization, whether that be in the work they do, their team or the company as a whole, it helps the employee feel they are impacting the outcomes of the business.

## The Organizational Integrity Pillar:

The organizational integrity pillar refers to the extent to which employees trust an organization to do what they say they will do. Having a culture of high organizational integrity, builds trust between employees and the organization, which strengthens the emotional commitment an employee has to their work, their team and the organization as a whole.

As a leader, you have the power to affect each of the four pillars. Engagement is a choice and a result of the behaviors and actions we make as leaders. Our daily collective choices can have a long-term impact on our organization and its employees. Taking personal accountability in the way you lead, communicate, interact with and develop your employees will increase engagement levels within your teams. View the choices and decisions you make as a leader with an engagement lens and you'll be able to start to see the positive impact on increases in customer loyalty/engagement, profitability and productivity.

## EXPLORE

Considering  
the four pillars  
of engagement,  
how can you, as  
leaders, enable  
engagement  
within your  
team?



# EMPLOYEE ENGAGEMENT

LEARN

## Step Two: Turning Engagement into Performance

While Leadership, Management, Employee Voice and Organizational Integrity create engagement for employees, it doesn't automatically guarantee high performance for your team. Enabling engagement is not enough, we need to be able to turn that engagement into performance.

Creating an engaged workforce relies on leaders to ensure that employees have the right **Abilities, Motivation and Opportunity** to turn engagement into performance.



To turn engagement into performance we need to consider



**What can we do to ensure that our employees have the right Knowledge, Skills and Behaviors to perform?**



**How can we ensure that our employees understand the Purpose of their work, have the Autonomy to make the right decisions and the Ability to master their skills?**



**What can we do to give our employees the opportunity to show people what they can do?**

Ensuring that our direct reports have the right Abilities and Opportunities and are Motivated can ensure high performance from our teams.

Let's take a look at Ability, Motivation and Opportunity more closely.



# EMPLOYEE ENGAGEMENT

Regular pg. 22  
Immediate  
Specific  
Encouraging

## Ability

Ability addresses the need for employees to have the right **Knowledge, Skills and Behaviors** to do their role well. Failing to help our direct reports find opportunities to learn new things, develop their skills and evolve their behaviors will mean that your employees will not perform at their best. It may also actively disengage them from the work they do. Giving employees the opportunity to grow, learn and develop their abilities allows them to increase their engagement and performance.



KNOWLEDGE

SKILLS

BEHAVIOR

## EXPLORE

What are ways  
to increase  
the abilities  
of your team?



# EMPLOYEE ENGAGEMENT

LEARN

Motivation can be described as the reason(s) for behaving in a certain way. In the context of CDK Global, creating an environment where employees have opportunity, mastery and a sense of purpose will help them to perform better.

Motivation can take two forms: intrinsic and extrinsic.



## Extrinsic Motivation

Extrinsic motivation can be described as the behavior that is driven by external rewards such as money, fame, good grades, praise or even behavior that is driven by avoiding external threats such as punishment.

Extrinsic motivators often lead people to complete a task even if that task is not particularly rewarding or enjoyable, to either earn a reward or avoid punishment. Examples of extrinsic motivators in the workplace could be:

- Receiving a monetary reward based on achievement against KPIs
- Threatening an employee with disciplinary action if they do not meet a deadline

We use extrinsic motivators often in the workplace and they are usually the way in which we try to motivate others to perform needed tasks. Although extrinsic motivators can be extremely useful in the right context, such as completing a simple/repetitive action or accomplishing a short-term goal, they can be difficult to manage.

For example;

- Offering rewards for a job well done can mean that employees will expect a reward every time they do something well
- Rewarding employees for reaching a certain standard or threshold can mean that they will not excel beyond that measure
- Threatening punishment if something is not achieved means that employees will more often than not complete the task, but rarely to a high standard.

# EMPLOYEE ENGAGEMENT

Dan Pink  
on Motivation - YouTube

## Intrinsic Motivation

Intrinsic motivation refers to behaviors that are driven by internal rewards. This means that the motivation to engage in a particular behavior comes from within the individual because it is naturally satisfying for them.

When a person is pursuing an activity for the pure enjoyment of it, they are doing so because they are intrinsically motivated rather than because of a desire to gain an external reward or avoid punishment. Examples of intrinsic motivators in the workplace could be:

- Assigning work to people based on what they enjoy doing
- Demonstrating how someone's work contributes to the bigger picture
- Allowing a person the control to make their own decisions about how to reach a goal
- Giving people the time to get better at the things they are already good at

Intrinsic motivators are very powerful and often overlooked in the workplace due to the extra effort required. It is often tempting to use extrinsic motivators due to how quickly we can apply these and see the results. With any quick win, the results can be short lived. Just as organizational and employee engagement, long-term results take time, effort, and some trial and error. For long-term results and sustainable wins, consider the ways you can take an active role in building the instinct motivation for your team.

## EXPLORE

Here are several scenarios that will help to demonstrate how extrinsic motivators work. Consider the scenarios below carefully and in a group, discuss the questions. Pay attention to how these situations would make you feel about the tasks that you are being asked to complete.

**Scenario 1** – You have been asked by your manager to complete a task that you really dislike doing. However, your manager has told you that it must be done by midday tomorrow, or they will take disciplinary action.

- What behaviors do you think you would demonstrate in this scenario?
- How would you approach the task?

**Scenario 2** – You have been asked to clean your manager's car, and if you do so, you will receive three month's salary as a lump sum payment.

- How would you feel about cleaning the car?
- To what extent would you clean the car?
- If you were asked to clean the car again, but you would not get any payment for cleaning it, would you do it?

# EMPLOYEE ENGAGEMENT

## EXPLORE

When it comes to motivation, think of the last time you were really motivated by a piece of work you were doing.

What was it that made it motivating?

Why?

Label the reasons you listed as either 'intrinsic' or 'extrinsic'.

What do you notice?

## LEARN

Extrinsic motivators can be useful when you need to motivate people to complete stand-alone tasks that don't require a lot of mental capacity. Otherwise you are increasing the chances that individuals will take shortcuts or do the bare minimum, thus not performing at their best. Extrinsic motivators are also less sustainable as their potential to motivate will diminish over time.

Given the nature of our industry, our organization, and our work, we need to focus on intrinsic motivators in order to successfully motivate our team in the long term.

The three most effective intrinsic motivators are:

**1. Purpose**

**2. Autonomy**

**3. Mastery**

# EMPLOYEE ENGAGEMENT

## Purpose

If someone knows why they are doing the work they are doing, and the importance of it within the bigger picture, they are much more likely to be committed to it. They are also more likely to strive towards the desired end goal, finding innovative solutions along the way, rather than working for the sake of working.

A sense of purpose is important at multiple levels:

Organizational purpose	Task purpose	Personal purpose
This is knowing exactly why the organization does what it does (mission and vision). It gives an overall sense of direction and meaning behind an individual's work.	This is knowing how your work is contributing to the team's, department's and organization's goals.	This is knowing why you are doing what you are doing in the broadest sense, and is very much linked to your individual values. This is personal for everyone, and cannot be changed by a person's manager or organization.

## Autonomy

When individuals feel that they have the autonomy to make decisions about their work, or the way in which they do their work, they are more likely to be motivated. They will be able to find a style of working that suits them best, while ultimately performing at their best. It is also a fantastic way to allow your team to learn by doing (if supported by coaching).

As a leader, it may be initially uncomfortable to provide autonomy to your team, and in some regulatory conditions, it may not be appropriate. First consider the risks involved and mitigate those risks or find alternative ways to provide autonomy.

## Mastery

Mastery is the internal desire to progress. Being able to see your progression of skills is inherently motivating, so as a leader, being able to identify and point out progress to your direct reports is vital.

One of the ways to reflect progress is by providing a merit award. Although these are linked to the extrinsic motivator of a reward, a merit award celebrates progress made within a job role, and is therefore also intrinsically motivating.

# EMPLOYEE ENGAGEMENT

## EXPLORE

How can you create a motivating environment for your direct reports?

Use the questions below to guide your discussion.

- Are your direct reports clear on the organizational purpose?
- What could you do to make it clearer?
- What tangible steps can you take to help your team understand the task purpose for various pieces of work?
- Think about a time when you have had a lack of autonomy. How did it make you feel?
- What are the potential risks involved in providing autonomy. How would you mitigate them?
- What different ways can you encourage progress and mastery within your team?

How can  
you create a  
motivating  
environment  
for your direct  
reports?



# EMPLOYEE ENGAGEMENT

## LEARN

### Opportunity

Lastly, your team will also need to have the opportunity to perform. When an employee has high ability and high motivation to complete their work, giving them the opportunity to show others their capabilities is an important factor in turning engagement into performance. For example, you have an employee on your team who is a skilled software developer who discovers writing code and improving their work to be personally satisfying. Yet this employee's performance goals are centered around reporting on the KPIs of the team and basic admin work. It is likely that your employee would not perform as highly as they could as they do not have the opportunity to show others the value they can bring to the organization based on their skills and intrinsic motivators.



Opportunity for employees involves identifying what they are good at and allowing them to "showcase" these skills, as well as sharing them with others.

Employees without the opportunity to showcase their skills run the risk of moving into non-engaged and actively disengaged employees. These disengaged employees may not put in the extra effort or motivation needed during critical periods or tasks. Overtime, can experience burnout and spend some of their free time searching for new roles or organizations to join. A important part of leadership is being able to identify employees at risk towards moving into a disengaged category. This type of monitoring can be completed through regular check-ins, active involvement of goal setting, and showing interest in an employees development plan.

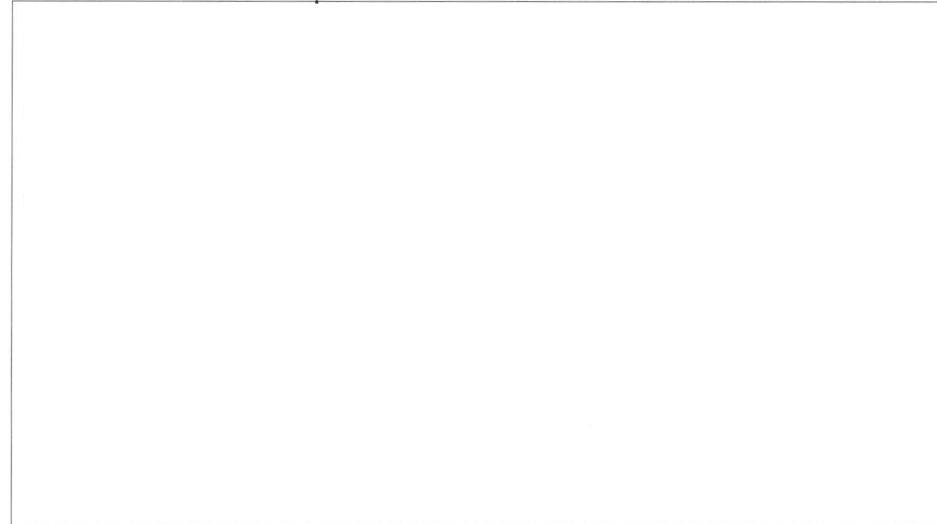
At times, an employee may not be a good fit for the team they are currently in, but still have areas of strength aligned with the organizational vision. Leaders who identify employes in this category can have an active role in facilitating a more aligned opportunity for the employee in the organization. Though there may be an increased amount of time a leader needs to spend with this type of employee, assisiting the employee in finding another role in the organization will help to prevent the increased level of discription a resignation may leave. As an added benefit, the employee maintains a positive outlook of the organization and is able to personally see the collaboration between leadership teams. This type of employee can set an example of positive engagement for current employees on your team, and carry this positively to their next role.

Opportunity can be a great stepping stone in turning engagement into performance, whether directly within your team or the larger organization.

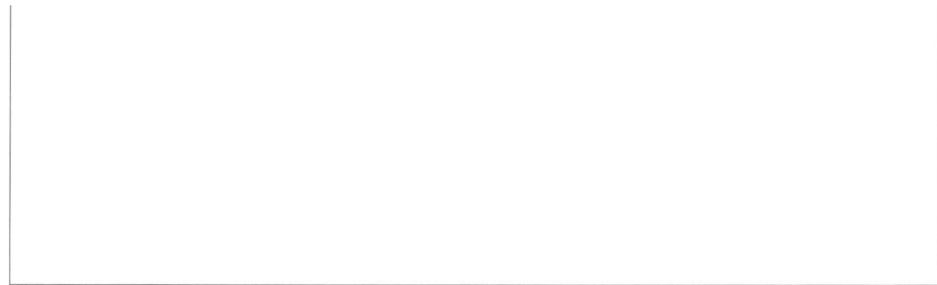
# EMPLOYEE ENGAGEMENT

## EXPLORE

What strengths  
do the individuals  
in your team  
have?



What activities/  
tasks do they  
really enjoy  
doing?



What ways can  
you increase  
opportunities  
for your team?



# EMPLOYEE ENGAGEMENT

## LEARN

At CDK Global, our annual Performance Development cycle provides managers with the chance to turn engagement into high performance. At different stages throughout the year, there are opportunities to help you highlight different parts of the engagement model to create an engaging environment that promotes high performance.



### **At the myGoals stage:**

Ensure that any goals are linked to the organizational strategy. This will provide purpose for your direct reports.

### **At the myDevelopment stage:**

Consider whether your direct reports have the right knowledge, skills and behaviors to succeed. You will learn more about this during the next workshop.

### **At the myReview stage:**

You can use this model to diagnose why someone may be underperforming. Do they have the right abilities, are they motivated to succeed and do they have the right opportunities to show what they can do?

### **At the myRewards stage:**

Consider how you use rewards as intrinsic motivators to demonstrate progression and accomplishment, rather than using them as extrinsic motivators for the year ahead.

At each stage of the performance management cycle, you will receive just-in-time training that will give you more detailed information about what, when and how to hold effective performance management conversations.

# EMPLOYEE ENGAGEMENT

What Does "Engaged" Look like?  
- participation  
- discretionary effort  
- When they say "I"  
- was thinking about...  
- personal development

## Step Three: Measuring Engagement

The engagement level of an individual or a team can rise or fall quickly throughout the year and is affected by many different factors. For example, large changes in the organization or a high workload can impact the engagement of any one of your direct reports. The annual engagement survey is a useful check-in point to see how engaged your team is, but it should not be the only time you seek to understand whether or not your team is engaged.

*What methods or data can you use outside of the survey that can help you to understand the engagement levels of your direct reports?*

When you do have the opportunity to receive feedback on engagement through a survey, it is a great way to get open, honest feedback from multiple sources at once. Take advantage of this feedback and use it to make improvements so that you can build a more engaged and higher performing team.

Be aware that if you do not take action on an engagement survey, it will discourage people from providing their views again in the future, meaning you will receive less and less feedback to use for developing.

Survey results can sometimes be overwhelming. There is a lot of data to dig through, so consider the areas that will have the most impact on engagement:

- **The priority questions**  
These questions will have the most impact on engagement if improved.
- **Most declined questions since the previous survey**  
This could indicate a barrier to engagement. Can you identify the cause of the decrease?
- **Lowest scoring questions in comparison with organization's benchmarks**  
This may be an issue unique to your team or your department. Look at your departmental results to see if it is a theme in the department and consider department-wide actions. Use organizational best practices to improve.
- **Lowest scoring questions across the whole team**  
This could also indicate a barrier to engagement, and will likely require a concerted effort to improve.

It's also important to recognize where engagement has improved, or is high. Make sure you understand what is enabling that engagement and keep it sustained!

# EMPLOYEE ENGAGEMENT

## Action Planning

When deciding what action to take following your myVoice results, it is easy for leaders to try to tackle everything, or focus attention on things that are outside of their direct control. When considering your results it is important to identify:

1. What is within your control?
2. What can you influence?
3. What do you not have control over?

You can't control your employee's personal lives, but you can care and work to understand their challenges.

The Circle of Control is a useful tool to identify these answers. The Circle of Control guides you to split the Engagement Survey results into three categories; concern, influence, control.

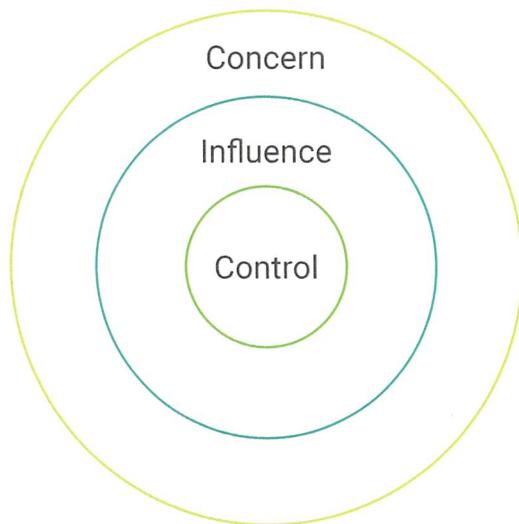
Questions that fall within your Circle of Control are where any actions will have the biggest impact. Be honest with yourself about what is truly in your Circle of Control. Examples of questions that are within your direct control could be:

- "I receive recognition from my manager when I do a good job"
- "I understand how my work fits into our overall objectives"

If something is not part of your Circle of Control, you need to decide whether it is something that you can significantly influence. If so, these will be things that fall in your circle of influence. These might be shared processes or simply things you provide input on, but should not be the main actions you take away from the results. Examples of questions that might fall into your circle of influence could be:

- "I am paid fairly for the work that I do"
- "I am satisfied with the physical environment in which I work"

Use the data to decide which areas you will take action on and avoid trying not to tackle everything in the report. As a guide, you should be looking at two or three areas to focus on, though each area might have multiple actions associated with it.



Things you have direct control over, e.g. what you read, whether you plan, how you do your work

Things you have some influence over, e.g. how the team works, how a meeting goes

Things that may affect you, but you have no control over, e.g. the weather, the economy, company-wide decisions

# EMPLOYEE ENGAGEMENT

## EXPLORE

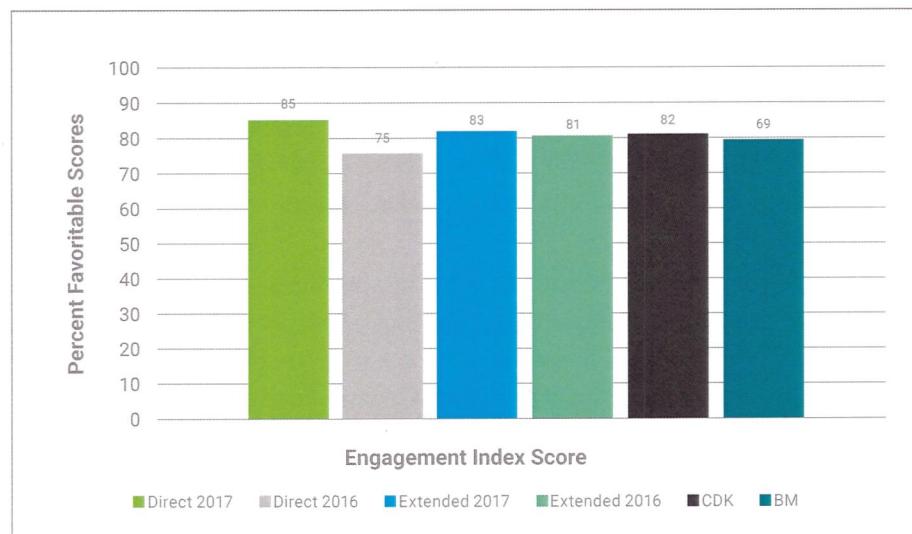
Look at the case study below and as a group:

1. Identify ONE area to focus on based on what is within your circle of control
2. Create actions that could help to improve employee engagement

Remember to use information we have discussed around **Enabling Engagement** and **Turning Engagement Into Performance**.

When action planning ensure that you build SMART goals with clear actions and milestones. Without SMART actions progress can be hindered or obscured, and we know that progress is key to engagement.

Engagement Scores



Question	Direct Score	+/-	% Distribution
I have a good understanding of my business unit's strategy	100%	+50%	<div style="width: 50%; background-color: yellow;">50</div> <div style="width: 12%; background-color: green;">12</div> <div style="width: 38%; background-color: darkgreen;">38</div>
I have access to the information I need to do my job effectively	88%	+38%	<div style="width: 12%; background-color: red;">12</div> <div style="width: 13%; background-color: yellow;">13</div> <div style="width: 75%; background-color: green;">75</div>
The leadership (of my business unit) has a vision of the future that motivates me	88%	+38%	<div style="width: 12%; background-color: red;">12</div> <div style="width: 25%; background-color: yellow;">25</div> <div style="width: 62%; background-color: green;">62</div> <div style="width: 13%; background-color: darkgreen;">13</div>
I understand how my work fits into our overall objectives	100%	+33%	<div style="width: 28%; background-color: yellow;">28</div> <div style="width: 38%; background-color: green;">38</div> <div style="width: 34%; background-color: darkgreen;">34</div>
The leadership (of my business unit) clearly communicates why changes are made	100%	+33%	<div style="width: 12%; background-color: red;">12</div> <div style="width: 38%; background-color: yellow;">38</div> <div style="width: 38%; background-color: green;">38</div> <div style="width: 12%; background-color: darkgreen;">12</div>

# EMPLOYEE ENGAGEMENT

## Actions Area

**Description of Action and Desired Outcome**  
(Specific, Measurable, Achievable and ambitious, Relevant)

**Why Was This Action Chosen?**  
(What data have you used to drive this decision?)

**Review Plan**  
(Who will review progress, what will they do, and when will they do it?)

**Deadline**  
(Time-bound)

# EMPLOYEE ENGAGEMENT

## APPLY

What does this mean to you as a people leader?



What resonated with you most?



What actions will you take away from this?



### Want to Learn More?

- Dan Pink, Drive: The Surprising Truth About What Motivates Us (2009)
- Rodd Wagner and Jim Harter, "The Fourth Element of Great Managing", Gallup News (2007) <http://news.gallup.com/businessjournal/28270/fourth-element-great-managing.aspx>
- Simon Sinek, Start with Why (2011) <https://startwithwhy.com/>
- Shankar Vedantam, How To Build A Better Job (2016) <https://www.npr.org/2016/03/28/471859161/how-to-build-a-better-job>

# RECOGNITION

## LEARN

Recognition is defined as: "The appreciation or acknowledgement of an individual's or team's behavior, effort, or result that supports the organization's goals and values."

Recognition emphasizes the expression of appreciation, and is more about saying 'thank you'. In a Gallup study, it was identified that one of the biggest things that impacts the engagement of your direct reports is whether or not they have received any recognition from a supervisor in the past seven days. Recognition is key to engagement

However, just saying 'thank you' without giving clear reasons why you are saying it will not increase engagement. Like feedback, recognition is most helpful with the greatest impact on engagement when it is Regular, Immediate, Specific and Encouraging. The RISE model below is a helpful framework to ensure that the recognition you give is effective and meaningful.

### The RISE Model

R - Regular	I - Immediate	S - Specific	E - Encouraging
Do not wait until performance reviews to share your appreciation. Make it more regular and build a culture of recognition.	When recognition is timely, it shows that you've noticed and care enough to celebrate their success.	Be specific about what behavior, effort or result you want to recognize, and describe the impact (to you, the team and/or the organization). You can use the SBI feedback model to do this. Just saying 'great job' will not reinforce the behavior you are looking for, and may even be disengaging as it's not personal.	Express appreciation, and celebrate their success. It's important to remember what may be encouraging for one person may not be encouraging for another – some people are introverts and don't enjoy the spotlight, while others are extroverts and enjoy being celebrated in a public way (remember the individual differences).

# RECOGNITION

APPLY

What does this  
mean to you  
as a people  
leader?



What resonated  
with you most?



What actions  
will you take  
away from  
this?



## CUSTOMER FOCUS

At CDK Global, we strive to put customers at the heart of what we do. Understanding the challenges our customers face and providing them with simple and effective solutions to make those challenges easier, allows us to be effective and remain competitive. Focusing on our customers' needs helps us to improve the relationships we have with them and build a loyal customer base that will want to work with us in the future. One of the key Leadership Competencies for CDK is Customer Focus, which demonstrates the right behaviors to stay focused on the needs of our customers.



### Customer Focus

We work for our customers, and see our success starting with their success.

- All levels and departments focus on the customer
- Understand customer goals and needs
- Do what is right for customers and CDK Global
- Deliver a great customer experience
- Produce products and services that add value to the customer
- Build customer loyalty and increase Net Promoter Score (NPS)

#### EXPLORE

How does  
customer focus  
apply to you and  
your role?



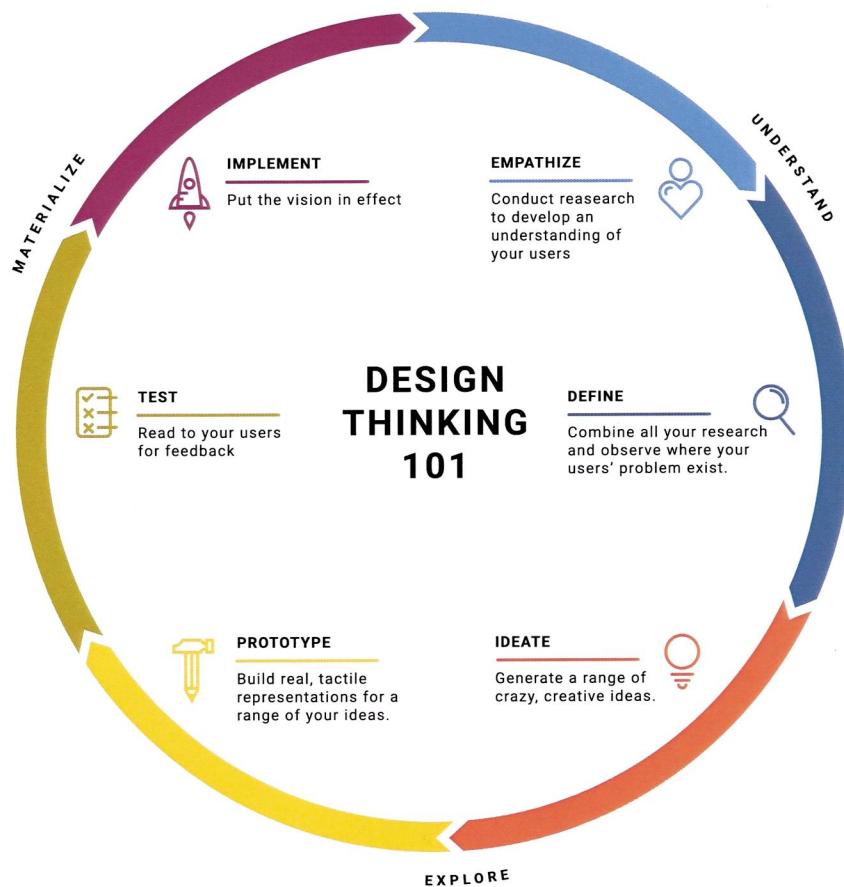
# CUSTOMER FOCUS

LEARN

## Keeping a Competitive Advantage

Remaining customer focused is vital in ensuring that we maintain a competitive advantage. Using a hands-on, customer-focused approach to problem solving will lead us to continually innovate. It's innovation that will ensure that we stay relevant in a fast-paced competitive environment and not lose market share to start-ups who disrupt an established market.

There are a number of thinking and innovation models that can be used to ensure that customers remain at the heart of what we do. The one we will explore in this workshop is Design Thinking, developed by David Kelley and Tim Brown of IDEO in the 1990s. The Design Thinking methodology includes three distinct phases (understand, explore, materialize), and six subphases as shown in the diagram below.



# CUSTOMER FOCUS

## **Empathize**

Conducting research in order to develop knowledge about what your users **do, say, think and feel**. This stage is about putting yourself in your customer's shoes

## **Define**

Combine all your research and observe where your customer's problems exist. In pinpointing your customer's needs, you can begin to look for opportunities for innovation

## **Ideate**

Brainstorm a range of crazy, creative ideas that address your customer's needs identified in the define phase. Give yourself and your team total freedom; no idea is too farfetched and quantity supersedes quality

## **Prototype**

Build real, tactile representations for a subset of your ideas. The goal of this phase is to understand what components of your ideas work, and which do not. In this phase you begin to weigh the impact vs. feasibility of your ideas through feedback on your prototypes.

## **Test**

Return to your customers for feedback. Ask yourself 'Does this solution meet the customer's needs?' and 'Has it improved how they feel, think, or do their tasks?'

## **Implement**

Put the vision into effect. Ensure that your solution is materialized and touches the lives of your end customers.

## EXPLORE

Apply Design Thinking to your own work. Consider a project or piece of work you have recently worked on and answer the following questions.

What did I do to put myself into my customer's shoes?



--

How did I define the problem that needed to be solved?



--

# CUSTOMER FOCUS

What did I do  
to come to the  
right solution?



How much time  
did I invest  
in creating a  
prototype?



How did I test  
my solution  
fitted to my  
customer's  
needs?



How did I  
implement  
the solution?



# CUSTOMER FOCUS

## LEARN

There are many factors within an organization that can prevent us from following all of these steps to genuinely innovate and provide a customer focused solution. Barriers such as time pressures or a temptation to recycle older solutions can stop us from investing the time to **understand** and **explore**.

In the next section we are going to focus on the parts of Design Thinking 101 that get us closer to understanding the customer and creating truly customer focused solutions. These are **Empathizing** and **Testing**.

### **Empathizing**

Empathizing (or Customer Insight) is understanding and connecting with your customer, based on what you can learn about their buying behavior, their experiences with you, their beliefs or needs. Empathy goes beyond raw data or research; it is a multifaceted view of your customers derived from a strategic analysis of qualitative and quantitative data.

Without empathy, you may find yourself working on products and services that the customer doesn't want, doesn't need, or doesn't value. This is not only an enormous waste of time and effort, but it can kill an organization completely if it's not rectified.

As people leaders, your role in sustaining an empathetic mindset is vital, and this mindset should be applied to both internal and external customers. Understanding your internal customers will stop you and your team from wasting resources and will allow you to spend time on what is really important.

To build empathy, you need to focus efforts on research and questioning.

### **Research**

Use data to build an understanding of who your customers are and what environment they are working in. The pre-work for this workshop involved understanding more about our customers and the context and market they are operating in, and it was designed to help you empathize with their situation. This is the first piece of research you need to do to understand any customer.

Then you can look at how your customer uses the service/product/process. Think about what metrics you can use to help you understand this, for example, look at the number of support emails sent or the most common support issues. Use qualitative and quantitative methods to make data-driven decisions (consider what you have learned from the first workshop on data-driven decision-making).

### **Questioning**

To be able to understand your customers, you need to ask questions. It's no good assuming you know what they want, love about the product/service, or get frustrated about. Look for their first reactions - this often gives more information than when you ask them to be logical. Ask about how a product makes them feel, rather than what they think the benefits are.

# CUSTOMER FOCUS

## EXPLORE

What do you use  
the software for?

JIRA

To try and put yourself into one of our customers' shoes, think about a piece of software you use every day and that you rely on to get your work done. In a group, discuss the following questions.

Which part of the  
software do you  
use the most?

What is helpful  
about the  
software?

What frustrates  
you about the  
software?

What feedback  
would you give  
to the supplier?

# CUSTOMER FOCUS

## LEARN

### Testing

Testing is an incredibly important part of innovating and building customer focus. Whenever we create something, whether it's a product, process or other piece of work, we make some assumptions, no matter how much we understand the customer. This is inevitable as otherwise we would not ever be able to make decisions. However, what we can do is check those assumptions by getting feedback on the work we have done. We are not infallible; our assumptions can be wrong.

## EXPLORE

What assumptions did you make in order to come to a decision?



In pairs, discuss with the other person a decision you have made recently.

If you had to make the decision again, how would you test those assumptions?



# CUSTOMER FOCUS

## LEARN

### Repeating the Cycle

One thing you will have noticed is that the Design Thinking model is cyclical. Once you have completed all three phases, you do it again. This is an essential aspect of Design Thinking – as soon as you stop empathizing with your customer, you stop innovating, and you risk falling behind. Needs change over time. What was useful for a customer a year ago may not be useful anymore.

This is why we refer to it as Design Thinking – it is a mindset rather than a process with an end. And it's a mindset we need to develop in order to succeed.

### Consumer Experiences

As a Business-to-Business (B2B) company, we spend most of our time thinking of our customers, but we also need to consider the end consumer: the person buying or owning the vehicle. It is the end consumer that our customers are trying to connect to. If we understand them, we can support our customers better. Using the Design Thinking model, we can aim to understand the consumer in the same way that we can understand our own customers.

## APPLY

What does this mean to you as a people leader? 

What resonated with you most? 

What actions will you take away from this? 

### Want to Learn More?

- Nielsen Norman Group, Design Thinking 101 (2016) -  
<https://www.nngroup.com/articles/design-thinking/>
- Penny Herscher, Top 5 Reasons to Understand Your Customer's Customer (2012) [https://www.huffingtonpost.com/penny-herscher/top-5-reasons-to-understa\\_b\\_1498320.html](https://www.huffingtonpost.com/penny-herscher/top-5-reasons-to-understa_b_1498320.html)

# COMMUNICATION METHODS

## LEARN

Communicating effectively is an important skill for leaders. Communicating clearly through appropriate channels will ensure that the message you send is received in the same way that you meant it. This can reduce confusion, emotional responses, and disengagement.

When communicating, you should always think about

### Planning

#### Purpose

What do I want to say?

#### Audience

Who do I want to say it to?

#### Method

How will I say it?

---

### Communicating

#### Noise

What could stop the message being understood?

#### Filters

What filters will I need to consider?

#### Context

What else is going on in the business when I am communicating?

---

### Clarifying

#### Language

How will I ensure that my message is clear?

---

### Follow up

#### Understanding

How will I ensure that my message is understood?

## EXPLORE

What do you notice about it?  
What's good and what could be better?



# COMMUNICATION METHODS

LEARN

## Planning a message

Great communication is not just about delivering a message. You need to spend the time to properly plan your message and follow up your message.

When planning a message, you need to consider:

1. The Purpose of your communication
2. The Audience for the communication
3. The Method of communication that will support the purpose and audience best

## Purpose

Consider what was learned during the engagement portion of this workshop and the impact purpose can have on motivation. This is the same reason it's important to consider the purpose when planning for a message. You want people to be engaged in the message and be motivated to take action.

## Audience

Planning your message for your audience will enable you to tailor your message to make it as impactful as possible, allowing you a better chance to get to your desired outcome. Having a clear purpose helps you determine what you need to consider about your audience.

There are a number of questions you may need to consider about your audience:

- Are they external or internal?
- What do you think their priorities are / What will they be most interested in?
- What is their role (in the business/in the project)?
- What impact will this message have on them?
- What is their level of influence over any decisions?
- What state of mind are they likely to be in?
- Do they have any time constraints?
- What is their native language?
- Where are they based?
- Are there any cultural differences?
- Do you know what their DiSC profile is?

# COMMUNICATION METHODS

## Methods

When considering what method you will use to communicate your message, you need to take into account the audience and purpose. Different methods will be appropriate for different audiences and for different purposes.

## EXPLORE

Discuss in groups the pros and cons of five different methods and write your responses in the table below.

Method	Pros	Cons
Email	efficient, concise, address multiple, refer back	Misinterpreted, wrong audience? no non-verbal
Text	fast/short good for alerts	non-professional could get too long
Phone	more personal	1-1
In-Person	non-verbal communication	travel constraints
Video	hand gestures, eye contact, screen sharing, recording	not everyone turns on video, technical difficulties
Conference Call	hard to ensure engagement, don't always know who is in the room	training, more personal group conversation
Plan your message	Think of how you will communicate to your team/colleagues/manager about this program, and use the template below to plan your communications:	

Audience	Purpose (Know, Feel, Do)	Key Content	Channel(s)	Timing
Team	increase engagement	knowledge share	Video	Next week (4 wk series)
Manager	update	summary	in-person 1-1	Next week

# COMMUNICATION METHODS

LEARN

## Communicating a message

Whilst you are communicating, there are lots of things that can get in the way of how your audience interprets and understands your message. This can be noise, filters or context. Understanding what may be getting in the way of effective communication will help you to adjust it.

### Noise

Noise appears if your audience's attention is on something else or if your communication is one of many (e.g. an email getting lost in a full inbox). You can reduce noise through careful planning and by reducing distractions.

### Filters

The experiences each individual has in their life create a filter through which they see the world. This can come from many different reasons, such as:

- **Culture** – do they culturally interpret information a certain way if it comes from their leader? If it comes via email?
- **Experience with similar scenarios** – Has this person experienced communications not being genuine/followed through before? Will this change how they receive the information? For example, they may meet the communication with skepticism.
- **DiSC profile**
- **Values**
- **Gender/age/race etc.**

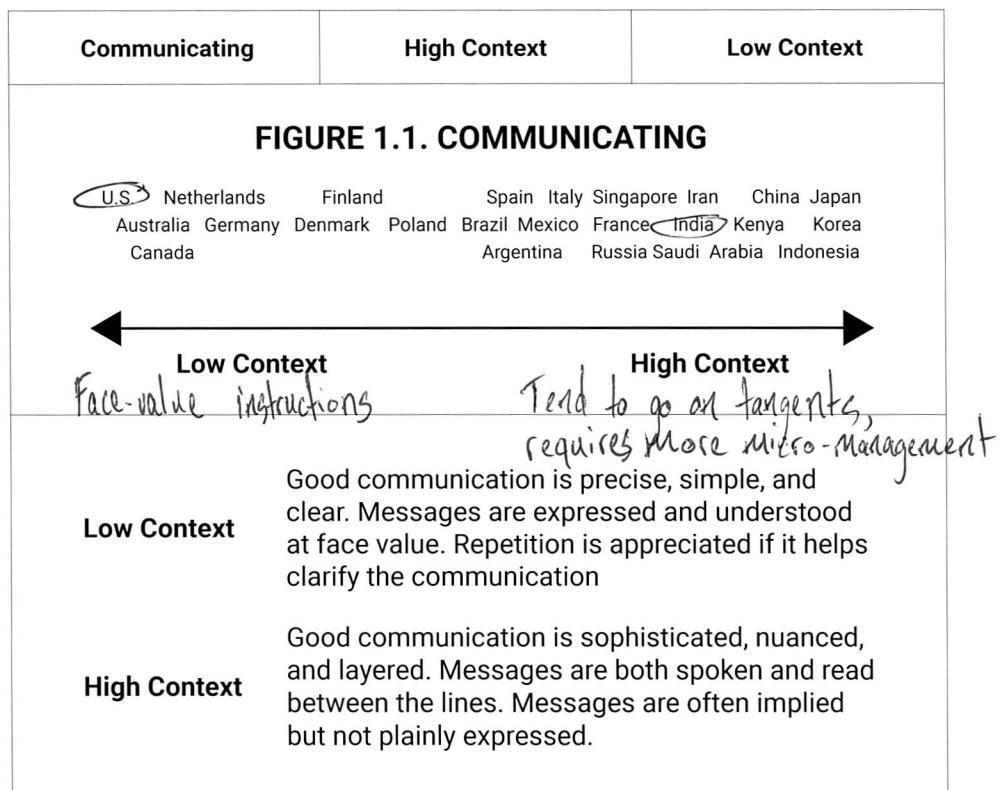
The more diverse your group, the more likely they will each have different filters to interpret the information - all the more reason it is important that you are clear and empathetic to individuals. Try to understand things from their perspective. Recognize that you have your own filters and that may interfere with getting your message across clearly. What assumptions are you making?

### Context

What else is happening around the business that can affect your message? Does the audience need more information to be able to understand the message?

This can depend on cultural differences as well. According to Erin Meyers 'Culture Map', there are some cultures which operate in a low-context environment, such as the U.S., and some that operate in a high-context environment, such as China. Low-context cultures tend to rely on explicit communication and may not consider non-verbal elements of a communication as highly as the content of the communication itself. Whereas in high-context cultures, non-verbal communication (e.g. tone of voice, facial expressions) is seen as very important.

# COMMUNICATION METHODS



EXPLORE

What can you do to support a high-context culture when communicating?

- Ask them to repeat back. Ask clarifying questions.
  - Ask "do you have any concerns?" instead of "Do you have any <sup>questions?</sup>"
  - Training on something new requires multiple trainings.
  - Requires comprehensive documentation.

What can you do to support a low-context culture when communicating?

# COMMUNICATION METHODS

LEARN

## Clarifying a Message

To ensure a message is as effective as possible, it needs to be clear. There are different ways that you can do this for both written and verbal communication.

- For written communications, you can ensure that you:
- Keep language as simple as possible
- Avoid repetition
- Use visuals
- Use text formatting and spacing to highlight key messages
- Call out any actions separately
- Keep sentences short
- Use bullet points
- Keep additional/optional information in an attachment
- Signpost different sections of the communication

For verbal communications, you can use many of the same ideas, such as using visuals (PowerPoint slides, printouts, prototypes, demonstrations). Think back to what was covered in the previous workshop as part of the presentation skills section. You can also:

- Avoid culturally specific phrases
- Pause frequently
- Speak slowly
- Summarize sections of your communication before moving on
- Regularly check for understanding

# COMMUNICATION METHODS

EXPLORE

Look at the communication below and edit it to get to the clearest message possible.

Subject Line: Recruiting Your Channel Partners

"Dear Jim-

I was curious if you had any concerns about how your channel partners will hit your revenue goals and KPIs or if you are trying to figure out what is and isn't working in your partner community. I know firsthand how frustrating and challenging it can be to keep partners focused on your products, so your revenue goals are met...without busting your budget.

We've had tremendous success with companies like ABC Corporation, where we drove 150% net new business, when we worked with XYZ Inc. we were able to reduce partner cost by 50% and we helped ACME Inc. close \$1.2M in new business in 6 months.

Would it make sense for us to chat in order to discuss this further? If you do not have any concerns about your partner program, then I want to respect your time and there would be no need to chat. If, however, you have areas you are trying to address, I'd like to learn what those challenges are. Would you be so kind to let me know if you feel quick chat would be valuable to you?

If you could also let me know what number I can reach you at if you are happy to talk.

Please accept my thanks for your time to read this message.

Have a great weekend!"

Edited Version



# COMMUNICATION METHODS

LEARN

## Following up a message

Make sure that you are confirming that your communication has been understood correctly by your audience, and that you are getting the response you need. Whatever method of communication you choose, there are ways to check understanding, and this can be influenced by the audience as well. For example, some cultures or individuals do not feel comfortable asking questions in front of a large group. In these cases you should follow up on a one-to-one basis to check understanding later.

You should also ensure that everyone in the audience has had the opportunity to understand. You can do this by:

- Allowing plenty of time at the end of a communication for people to ask questions
- Creating a safe environment
- Reiterating confidentiality (if applicable)
- Asking individuals to summarize their understanding
- Following up the communication later
- Allowing all individuals the chance to speak, not just the more vocal ones
- Specifying the channel you would like to receive responses through (if not immediate).

APPLY

What does this mean to you as a people leader? 

Consider communication channels

What resonated with you most? 

"Do you have any concerns?" - India

What actions will you take away from this? 

# EMOTIONAL INTELLIGENCE

You are  
the weather

## EXPLORE

Where do you feel the emotions listed below? What is your typical response when experiencing that emotion? What effect do your responses have on others?

Emotion	Where You Feel It	Your Typical Responses	Effect On Others
Anger			
Enjoyment			
Fear			
Sadness			
Disgust			

# EMOTIONAL INTELLIGENCE

## LEARN

When you become a leader, your role shifts from focusing on yourself and your own work product to focusing on the needs of others so that they can create their best work product. As we've learned already, a psychologically safe environment at work is paramount to producing high-quality work. Part of creating that environment involves the ability to recognize, understand, and manage or influence our own and others' emotions – in other words, to demonstrate emotional intelligence.

Daniel Goleman, an American psychologist who popularized the concept of Emotional Intelligence in the 1990's, defines it as the competence in four areas:

	What I See	What I Do
Personal Competence	Self-Awareness	Self-Management
Social Competence	Social Awareness	Relationship Management

**Self-Awareness:** The ability to understand our own emotions and their effects on our performance.

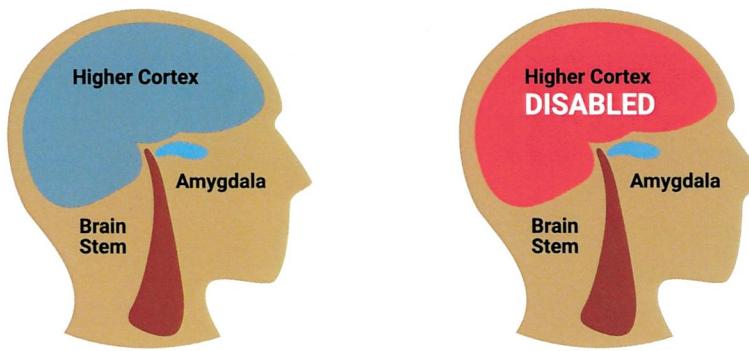
**Self-Management:** The ability to keep disruptive emotions and impulses in check and maintain our effectiveness under stressful or hostile conditions.

**Social Awareness:** The ability to sense others' feelings and perspectives, taking an active interest in their concerns and picking up cues about what others feel and think (1:1 and in group settings).

**Relationship Management:** The ability to have a positive impact on interactions with others, help others through emotional or tense situations, tactfully bringing disagreements into the open and finding solutions all can endorse, and working with others successfully.

# EMOTIONAL INTELLIGENCE

Your recognition and control of your own feelings and responses has to come first, before looking to others. What makes it difficult is your brain's possible interpretation of a stimulus as a "fight, flight, or freeze" scenario. When your brain receives a stimulus, your thalamus (control center) will trigger either your amygdala (emotion-processing center) or neocortex (rational thought center). If the thalamus senses a threat, based on your past experiences, it will trigger the amygdala and shut off access to the neocortex, letting your emotions take over. This is called an "amygdala hijack", and in the case of a real threat, it can save your life. But in the case of a perceived threat it will result in an immediate, strong emotional reaction and potentially destructive behavior.



If we are not adept at recognizing and regulating our own emotions, a "complementary hijacking" can occur. We see someone else acting out of emotion and can easily be drawn in to act the same way. Think about any high-stakes argument you've had with a partner or family member, and how easily you can fall into the trap of mutual anger when they approach you with that emotion!

Though you can't prevent an amygdala hijack, you can regulate your response. By pausing for just a few seconds between the stimulus and your response, you can re-engage your neocortex and allow yourself to think more clearly about how you should react in the scenario. It also helps to label your emotions – i.e., "I'm feeling frustrated right now" – as the act of labeling forces the engagement of your neocortex and can help guide you back toward productive problem solving.

Research shows that leaders who demonstrate high emotional intelligence have higher performing teams, more profitable companies, lower accident rates, and less turnover. So, how do you build your skill level in this area?

- Learn to recognize your body and brain's responses to different situations – and practice labeling those emotions. Extend that critical thinking further to understand how your typical reaction when feeling a particular emotion may affect those around you.
- When you feel a strong emotion, take an extra breath before responding or reacting, giving yourself time and space to choose the best response vs. your typical response.

# EMOTIONAL INTELLIGENCE

David Rock  
TEDxTokyo  
"Learning about the brain changes everything."

- Learn to recognize cues in others that could signify a particular emotion. Don't assume you know how they're feeling — pause the conversation and use tentative questions to help them recognize their emotion so they can choose their best course of action. Be careful not to engage in complementary hijacking.
- Respond with empathy to others, using supportive language and conveying concern for them as a person. Always assume good intent. Practice active listening.

## EXPLORE

What is similar? What is different? What does that make you think about recognizing and responding to others?

Emotion	Feels Like	Typical Responses	Effect On Others
Anger			
Enjoyment			
Fear			
Sadness			
Disgust			

# EMOTIONAL INTELLIGENCE

## APPLY

What does this mean to you as a people leader?



- Emotions should not be suppressed, instead managed
- guide others toward managing emotions

What resonated with you most?



What action will you start or stop in order to increase your self-awareness and/or self-management of your emotions?



take a look at resources below

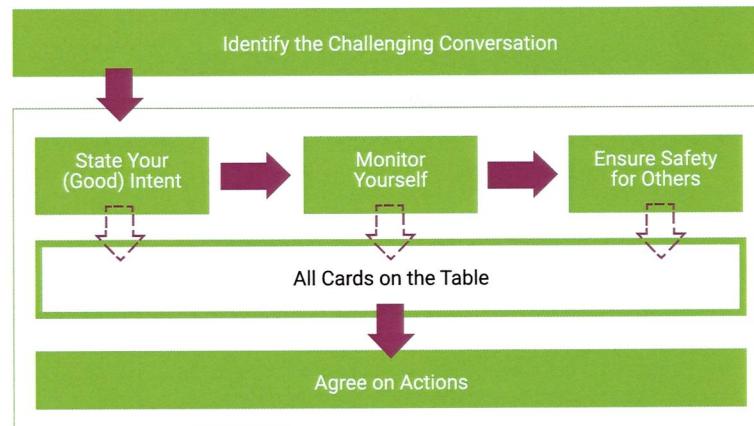
## Want To Learn More?

### Emotional Intelligence: Why It can Matter More than IQ, Daniel Goleman (1995)

- Hersher, Rebecca, "The Making of Emotions, from Pleasurable Fear to Bitter sweet Relief," National Public Radio (2017)
- Rosin, Hanna and Alex Spiegel. "Emotions," Podcast. Invisibilia, June 1, 2017
- Rosin, Hanna and Alex Spiegel. "High Voltage (Emotions Part Two)," Podcast. Invisibilia, June 22, 2017
- "10 Must Reads on Emotional Intelligence," Harvard Business Review (2015)
- Atlasofemotions.org

# CHALLENGING CONVERSATIONS (PART 1)

## LEARN



## Challenging Conversations Model

### 1. Identify the Challenging Conversation

- a. Does it have:
  - i. high stakes?
  - ii. strong emotions?
  - iii. opposing opinions?
- b. Is it about the:
  - i. Issue?
  - ii. Pattern of Behavior?
  - iii. Relationship itself?

### 2. State Your (good) Intent

- a. What do you really want for:
  - i. yourself?
  - ii. others?
  - iii. the relationship?
  - iv. the organization?
- b. What is your goal in the conversation?
- c. Invite the other person into dialogue.

### 3. Monitor Yourself

- a. Recognize Your Reactions: Attacking or Retreating
- b. Stop the Stories: Observing vs. Judging
- c. Recognize Your Role:

- i. What do your words or actions say about your intent?
- ii. What do your words and actions say about what you believe about yourself and the other person?
- iii. How do you need to adjust your words or actions?

### 4. Ensure Safety for Others

- a. Recognize Others' Reactions
- b. Mutual Purpose
  - i. Do others believe that you care about them and their goals?
  - ii. What are your shared goals?
- c. Mutual Respect
  - i. Apologize (when respect is violated)
  - ii. Contrast (when there is or could be misunderstanding)
- d. Use Tentative Language
  - i. Ask
  - ii. Paraphrase
  - iii. Prime

### 5. Agree on Actions

- a. What are the next steps for each person?

# CHALLENGING CONVERSATIONS (PART 1)

## Where to Start?

Challenging conversations can occur on a regular basis and are important conversations to navigate. They occur in the workplace when you are having a conversation with your manager about a promotion which they may not believe you are ready for, or in a meeting where a decision needs to be made that could make or break a project.

These conversations occur at home as well, when you have a conversation with your partner about moving and you disagree about where you want to live – or sometimes, even over where to go to dinner! What makes any conversation a challenging one is that it contains three elements:

- 1. high stakes**
- 2. strong emotions**
- 3. opposing opinions**

Challenging conversations can happen in any area of your life, such as:

- Dealing with a rebellious teenager
- Talking to a team member who isn't keeping to commitments
- Asking a friend to pay back a loan
- Talking to a colleague who has behaved offensively
- Ending a relationship
- Giving an unfavorable performance review

These are just a few examples; you can think of dozens more. What makes these conversations challenging, though, is that under the surface, there are complexities. They tend to be about:

- 1. A particular problem** (single instance)
- 2. A pattern of behavior** (multiple instance)
- 3. The relationship itself** (how a problem is affecting the relationship)

Identifying the real issue can be tricky; but it's important to do so in order to move into productive conversation.

# CHALLENGING CONVERSATIONS (PART 1)

## EXPLORE

Think of a challenging conversation you have had recently, at work or at home. Answer the following questions with that conversation in mind to see if it meets the requirements of a Challenging Conversation.

What were  
the stakes?



What emotions  
did you feel?



What were  
the opposing  
opinions?



What was  
the issue?



# CHALLENGING CONVERSATIONS (PART 1)

## LEARN

Now that you can identify a challenging conversation, how do you turn it into a successful conversation with agreed results?

People who are skilled at holding challenging conversations are able to draw out all the relevant information to share, by creating open, honest dialogue. We call this having 'All Cards on the Table'. It's this free flow of information that allows people to understand each other, and therefore work together toward a shared solution.

Without the flowing discourse that comes from that honest dialogue, (when people withhold views or information, or inject their views without hearing the other side of the argument), then you are less likely to have the information you need to truly understand the other person and come to agreement.

Being skilled at challenging conversations requires a certain degree of humility, trust and vulnerability, but you cannot have a healthy conversation without All Cards on the Table.

The first step to a healthy challenging conversation is to **State Your (good) Intent**. Your true intentions and motivations behind a conversation can often be masked by emotions and get lost in the process. If you step back from the situation, it's likely that want good things for yourself AND all the other stakeholders. You may recognize that you are doing or saying things out of anger, or spite, or any other high emotion which are actually preventing you from working toward what you want out of the conversation. Finding and defining your good intent is crucial, and you should never start or engage in a challenging conversation until you've found it. And once you've found it – stay focused on it. It's what you really want out of the conversation – your true desired outcome.

To help find your good intent, ask yourself these questions:

- What do I want for **myself**?
- What do I want for the **other person**?
- What do I want for the **relationship**?
- What do I want for the **organization** (if applicable)?

When you're clear about what your true goals are for all the players, you've taken the first step to opening a healthy dialogue and putting All Cards on the Table. It's at this point that you can begin engaging with the other person, and through Stating Your (good) Intent, invite them into the conversation.

# CHALLENGING CONVERSATIONS (PART 1)

## EXPLORE

Read the following scenario:

Alex is frustrated with the quality of the work that Jude has been turning in recently. He's also noticed that Jude has been absent from team meetings. This is affecting the function of the team; they rely on Jude to pull his weight, and others are having to pick up his slack. Alex decides to ask Jude about it:

Alex (huffily): Why isn't the report completed yet?

Jude (earnestly): I haven't had a chance to finish, but I promise I'm working on it.

Alex (rolls eyes): sarcastically: So we'll have it in like, a year? I should know by now not to expect quality work from you.

If Alex was able to see through his frustration, what might he identify as his true, good, intent in starting this challenging conversation?

Alex	Jude	The Relationship	The Organization (if applicable)
Want the information he needs; wants Jude to be stronger	Have Jude look good; show competence, excel	be able to work together in better ways	enable decisions based on data

What do Alex's words and actions say to Jude about his intent?

hostile, attacking the person

How might Alex state his good intent to open this challenging conversation?

Given the team is relying on having this report completed. Have there been challenges in completing it? What can we do to improve delivery of work in a timely fashion? Do you have a new date you expect to complete this by?

# CHALLENGING CONVERSATIONS (PART 1)

## LEARN

Once you've identified your good intent, shared it, and begun a dialogue, the next step is to **Monitor Yourself**. This can be incredibly difficult to do, given that challenging conversations are inherently emotional, but until we can control our own reactions, we can't have a healthy challenging conversation. Think back to what you learned earlier about Emotional Intelligence – you have to start with yourself and **Recognize Your Reactions**.

When a conversation is challenging, we often respond in one of two ways:

- Attacking (Fight)
- Retreating (Flight)

These reactions are natural – amygdala hijack at work! But, attacking or retreating behaviors can take us further from our goal of the conversation, because they can be at odds with, or hide, our true intent. For example, you may lash out at the other person's shortcomings in response to feedback they have given you. This will not support your ultimate aim for the conversation, and could break down the honest dialogue you have worked to create. It's important to learn to recognize signs of Attacking and Retreating in ourselves so we can self-monitor and keep the conversation productive.

## EXPLORE

### Attacking Behaviors and Language

### Retreating Behaviors and Language

## LEARN

The other important aspect to Monitoring Yourself is to **Stop the Stories**. We all create stories in our minds about ourselves and others. It starts with seeing or hearing something, which leads us to draw conclusions, and then we react to and act upon those conclusions – whether they're true or not!

*observe, don't judge*

In challenging conversations, we usually tell stories about ourselves that make us look good. We're the victims, or we're helpless, or we're doing everything right and we deserve to feel/act this way! Here is the first chance to be honest with ourselves and stop telling stories. What could you be doing that is contributing to an unhealthy problem or dialogue?

# CHALLENGING CONVERSATIONS (PART 1)

On the opposite side, we usually tell stories about others that make them look bad. They're awful people, or they are out to get us, or they would never understand/change/care anyway. However, these stories assume that you know someone else's intent! If you haven't asked them directly, and they haven't provided you with honest responses (like you did when you stated your good intent), anything you think about the other person is a Story. This is why All Cards on the Table is so important!

The best place to start is to assume good intent. This will help you stay in state of calm and reason. Just think – if you are coming from a place of good intent, why wouldn't the other person be as well (when also given a chance to evaluate their true goals for themselves/others/the relationship/the organization)? Don't make yourself the hero and the other person a villain. Most people are reasonable and rational just like you, so start from there.

In order to have a productive challenging conversation, you have to learn to separate what you actually **observe** from the **judgements** and conclusions you're making, and the stories you're weaving as a result. There may be a host of other reasons why the other person is demonstrating certain behaviors, and you won't know what they are without enabling an open, honest conversation.

Using observations can help you explain your point of view in a more inviting manner. Observations are irrefutable, and more persuasive. They're less insulting, and they help keep a safe place for others to remain engaged in the conversation. Some phrases you could use are:

- "I noticed that.....and it lead me to conclude \_\_\_\_\_. Is that correct?"
- "I saw \_\_\_\_\_ and I started to think \_\_\_\_\_. Can you help me understand?"

This type of language clearly states your observations, and rather than stating your judgements as facts, you present them as possibilities – rather than hard truths. And, you open the conversation for the other person to share their reasons and put All Cards on the Table.

# CHALLENGING CONVERSATIONS (PART 1)

## LEARN

The last thing to think about with Monitoring Yourself in a Challenging Conversation is to **Recognize Your Role** in the situation. It's good to think about past behavior that may have contributed to the problem, as well as current behavior that you can adjust as needed. Keep asking yourself the following questions:

- What do your words or actions say about your intent?
- What do your words and actions say about what you believe about the other person?
- How do you need to adjust your words or actions?

It's okay if you get thrown off track – come back to Stating your (good) Intent, and then Monitoring your Reactions and Stories as you keep going. This will help to keep you on track to an open, healthy dialogue.

In the next workshop, we'll review the second half of the model, which focuses less on you and more on how to effectively engage others in a challenging conversation so you can come to shared solutions.

## EXPLORE

Form groups of three and identify who will be Person 1, Person 2, and Observer in each of the three scenarios below. Take 15 minutes to prepare for the conversation where you will be 'Person 1'.

Then, alternate practicing the challenging conversations. Person 1 should spend 10 minutes entering into dialogue with Person 2. The Observer should take notes throughout. Once the conversation has concluded, Person 2 and Observer should spend 5 minutes providing feedback to Person 1. Remember to use the SBI feedback model!

Swap around until you have all been able to practice holding a challenging conversation.

### SCENARIO 1

Person 1: You

Person 2: Your Manager

You are supposed to have weekly 1:1s scheduled with your manager, who has said she prefers face-to-face over email communication. It's become common that your manager cancels these meetings without much notice and without rescheduling, so you're only getting about one meeting a month. Your manager occasionally makes a joke about she hasn't seen you in a while. Since this started, you have stopped pushing for the meetings, and you engage with your manager less via other forms of communication, too.

positive potential  
direct solution  
need to ask more questions  
good to give reasons  
make it about the bigger picture

# CHALLENGING CONVERSATIONS (PART 1)

## SCENARIO 2

Person 1: You

Person 2: Your Peer

You work with this peer on a large, customer-facing project. The last few times you've met with the customer, you've noticed that this peer's behavior has damaged the customer relationship (not reading the room properly, not replying in a timely manner, saying negative things about the company); the customer has even made some comments to you about it. The outcome of this project is one of your major performance goals, so you're concerned about how this peer's behavior may end up affecting your reputation at work.

## SCENARIO 3

Person 1: You

Person 2: Your Direct Report

Since you took over managing this team, you've had a contentious relationship with one of your direct reports. He is constantly challenging you in meetings (in an unproductive manner), pushing deadlines, and making remarks about "how we used to do things here." You notice that his attitude is affecting how the rest of the team sees you as their leader. You've made attempts to warm up to him and get to know him as an individual, but that hasn't made a difference.

For your scenario, use the space below to plan your approach to the Challenging Conversation:

### 1. Identify the Challenging Conversation

What makes it challenging (issue/pattern/relationship)?

Confrontation about team member's contributions/actions

### 2. State Your (good) Intent

What do you want for;  
• Yourself  
• Others?  
• The Relationship?  
• The Organization?

Me: improve relationship; decrease time spent on issues; improve team perception of me  
Others: decrease disruption; minimize confusion  
Relationship: work together in a more positive and professional way  
Org: increase team's morale; remove distraction

# CHALLENGING CONVERSATIONS (PART 1)

## 3. Monitor Yourself

### Recognize Your Reactions

What attacking and/or retreating behaviors do you need to be aware of in yourself or the other person?



- feeling unvalued
- concern for throughput

What are the observable behaviors you have seen?



- challenging in meetings
- pushing deadlines
- changing perception

What stories are you telling yourself about yourself and the other person?



### Recognize Your Role:

What have your actions said about your intent?



## CHALLENGING CONVERSATIONS (PART 1)

What have your actions said about what you believe about yourself and the other person?



How do you need to adjust your words or actions?



As Observer, note your feedback on how Person 1:

Approached the conversation



Stated their intent



Reacted to the conversation



# CHALLENGING CONVERSATIONS (PART 1)

As observer,  
how would you  
react to the  
conversation  
initiated by  
person 1?



Person 1 – use this space to record feedback from your role play.

Feedback



## APPLY

What does this  
mean to you as  
a people leader?



• remember that there will be difficult conversations

What resonated  
with you most?



• solve the problem together

What actions will  
you take away  
from this?



• review

## Want to Learn More?

- Rebecca Knight, Difficult Conversations at Work (2015)

<https://hbr.org/2015/01/how-to-handle-difficult-conversations-at-work>

- Brown, Brene. "The Power of Vulnerability," TED.com (June 2010)

# COACHING

LEARN

## What is coaching?

Coaching is a tool that can be used by leaders to help focus on and improve the performance of their direct reports. While there are many different models that you can use to learn how to coach, at its core coaching requires a number of key skills. These are **listening, questioning, handling others' emotions, and awareness of non-verbal communication.**

As leaders, we often see our direct reports completing tasks and overcoming challenges that we have experienced before. In these situations, it is often tempting to be directive and give our direct reports the answers to problems they face instead of asking questions to help them to arrive at their own conclusion.

As you learn to coach, you will want to give advice, tell, make suggestions, instruct and offer guidance. It is important that you recognize when you want to do this and try to ask questions and listen to your direct reports.

Below is a scale of behaviors, ranging from Instructing to Coaching, with Mentoring in between. You should always aim to use the Coaching behaviors, as they're most effective in engaging the person and helping them learn to solve future problems on their own.

### Coaching (Pull)

Helping someone to solve  
their own problems

Listening to understand  
Reflecting  
Paraphrasing

Summarizing  
Asking questions that  
raise awareness

### Mentoring (Push & Pull)

Making suggestions  
Giving feedback

Offering guidance  
Giving advice

Instructing  
Telling

**Training & Instructing (Push)**  
Solving someone's problems  
for them



# COACHING

## Benefits of coaching

Coaching allows an individual to identify what they are doing well and what they need to improve. Coaching is valuable for individuals being coached, the leader doing the coaching, and the organization overall.

For individuals, coaching helps them:

- Build valuable skills and knowledge that improves their performance
- Feel supported and encouraged by their manager
- Experience the pride that comes with surmounting new challenges

For you, as a leader, coaching:

- Strengthens employees' skills so you can delegate more tasks to them and focus on more important managerial responsibilities
- Develops talent that can step into your shoes if you advance in the organization
- Boosts the productivity of your team

For the organization, it:

- Improves retention; employees are more loyal and motivated when their manager takes time to help them improve their skills
- Makes more effective use of company resources; coaching costs less than formal training

## The Skill/Will Matrix

The skill/will matrix is one way to determine if coaching is the best approach to your direct report's development.

- **Skill:** Experience with the task, training, knowledge, and natural talents.
- **Will:** Desire or achieve, incentives to do task, security surrounding job, confidence in abilities, and feelings about task ("attitude")

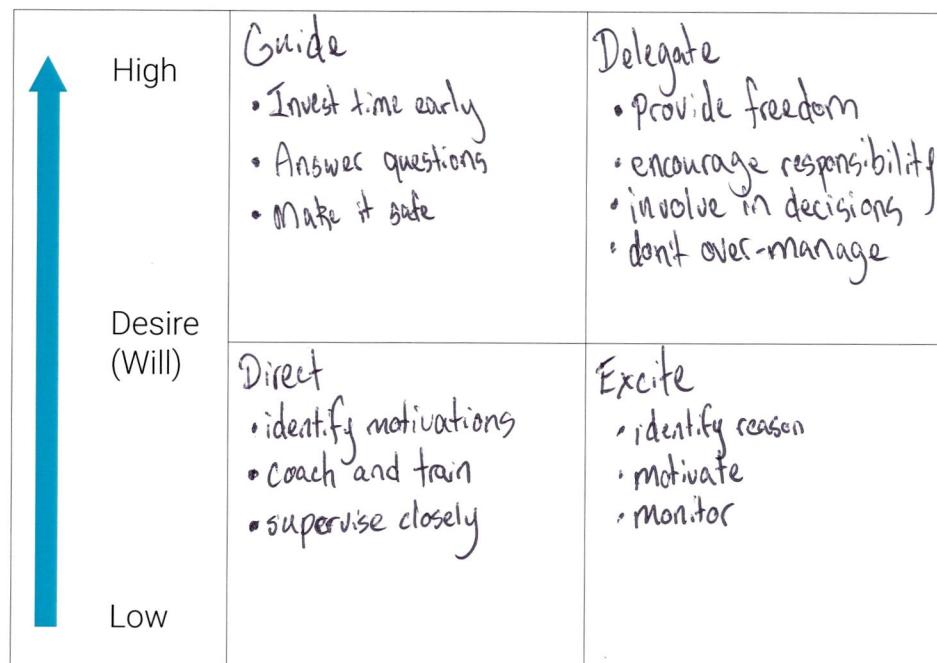
The skill/will matrix is a good way to identify whether coaching is appropriate. The approach you choose will be affected by the circumstances and you should consider the context of the situation and capability of the person in that situation. It is important to remember that the matrix is task specific- someone might be high skill and high will in one task, but low skill and low will in the other. It doesn't refer to a person as a whole. The matrix gives you two dimensions that you can use in order to consider the best approach to guide and develop that person.

# COACHING

## EXPLORE

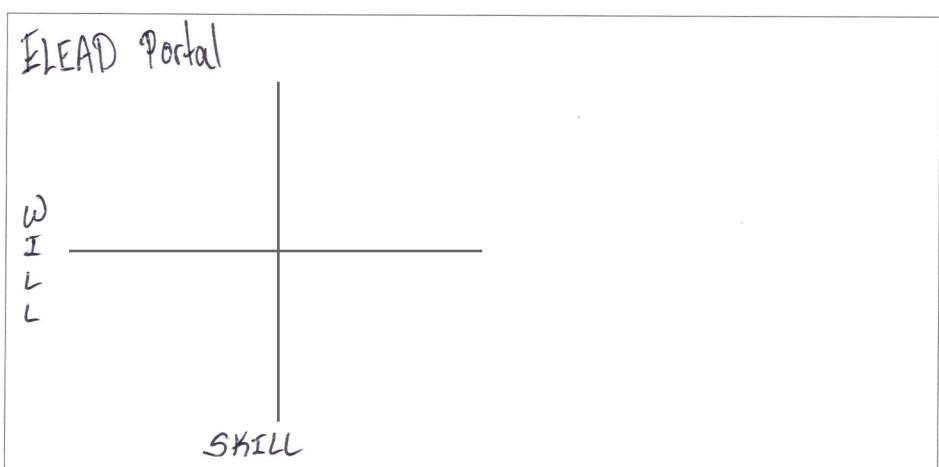
What do you, as a leader need to do when, someone has;

- a) LOW skill/LOW will
- b) LOW skill/HIGH will
- c) HIGH skill/HIGH will
- d) HIGH skill/LOW will



Individually, think of a task that needs completing within your team. Map your direct reports into the skill will matrix based on your understanding of their desire to complete that particular task and their skill to complete it.

What conclusions have you come to?



# COACHING

## LEARN

### GROW model

Developed in the early 1990's by John Whitmore, the GROW model is a way to structure a coaching conversation that focuses on thinking of people in terms of their potential, rather than their behavior or performance.

In his book, 'Coaching for Performance', John Whitmore describes some of the challenges that Managers experience when acting as a coach. This is because coaching forms part of your role and this can sometimes seem in conflict with other elements of the role of Manager, including; controlling work, making decisions or evaluating performance.

Limitations commonly cited by Managers as a reason not to coach, include time and quality pressures. Although Whitmore notes that being a good coach can help achieve positive effects on both saving time and improving quality, while also developing your teams.

**GOAL** Clarify what the desired outcome of the issue is

**REALITY** Explore what the current situation is

**OPTIONS** Generate ideas for next steps

**WILL** Determine actions

Below are some example questions you could use:

#### Goal

- What do you want to discuss?
- What outcome do you want from this discussion?
- What would need to happen for you to walk away feeling this has been time well spent?
- Is that realistic?
- Can you achieve that within the time frame?
- Will that be of real value to you?

#### Reality

- What is happening at the moment?
- When/How often does this happen?
- What effect does this have?
- How do you know this is a problem?
- What other factors are relevant?
- What have you tried so far?

# COACHING

## Options

- What could you do?
- Tell me what possibilities you see.
- What are the risks/benefits of doing that?
- Who might be able to help?
- Which of these options do you like the most?
- Rate from 1-10 the practicality of each of these options.

## Will

- What are your next steps?
- When will you do that?
- What might get in the way?
- How will you keep track of yourself?
- What support will you need? From who?
- How and when will you ask for it?

## EXPLORE

In groups of three, practice the GROW coaching model. For the practice, pick a current challenge that you are facing in your role as a leader to address. In practicing the model, the coach should help you to establish the **Goal** of the conversation and then explore the **Reality, Options** and what you **Will** do following the conversation.

Assign roles to each person. You will need:

- One coach – This person will practice using the GROW model
- One coachee – This person will be coached on a current challenge they are facing
- One observer – This person will write notes and provide the coach with feedback. The observer should look for instances where the coach is giving advice or direction rather than asking questions along with how well the coach is using the GROW model.

Each person has 10 minutes to practice the model and then five minutes to receive feedback from the observer.

After 15 minutes, you should switch roles to ensure everyone in the group practices the model, is coached and provides feedback.

# COACHING

## Practice One:

As Observer,  
what feedback  
do you have for  
the coach?



- Situation?
  - Behavior?
  - Impact?
- great description - express scan training opportunity  
↳ description of problem to solve, training, virtual and in-person
- dialog ↳ timeframe
- good motivation

As Coach, how  
did that feel?



What feedback  
did you receive?



What would you  
do differently  
next time?



## Practice Two:

As Observer,

- What feedback do you have for the Coach?
- Situation? Behavior? Impact?

As Coach,

- How did that feel?
- What feedback did you receive?
- What would you do differently next time?

## Practice Three:

As Observer,

- What feedback do you have for the Coach?
- Situation? Behavior? Impact?

As Coach,

- How did that feel?
- What feedback did you receive?
- What would you do differently next time?

# COACHING

## APPLY

What does this mean to you as a people leader?



What resonated with you most?



What actions will you take away from this?



GROW meetings



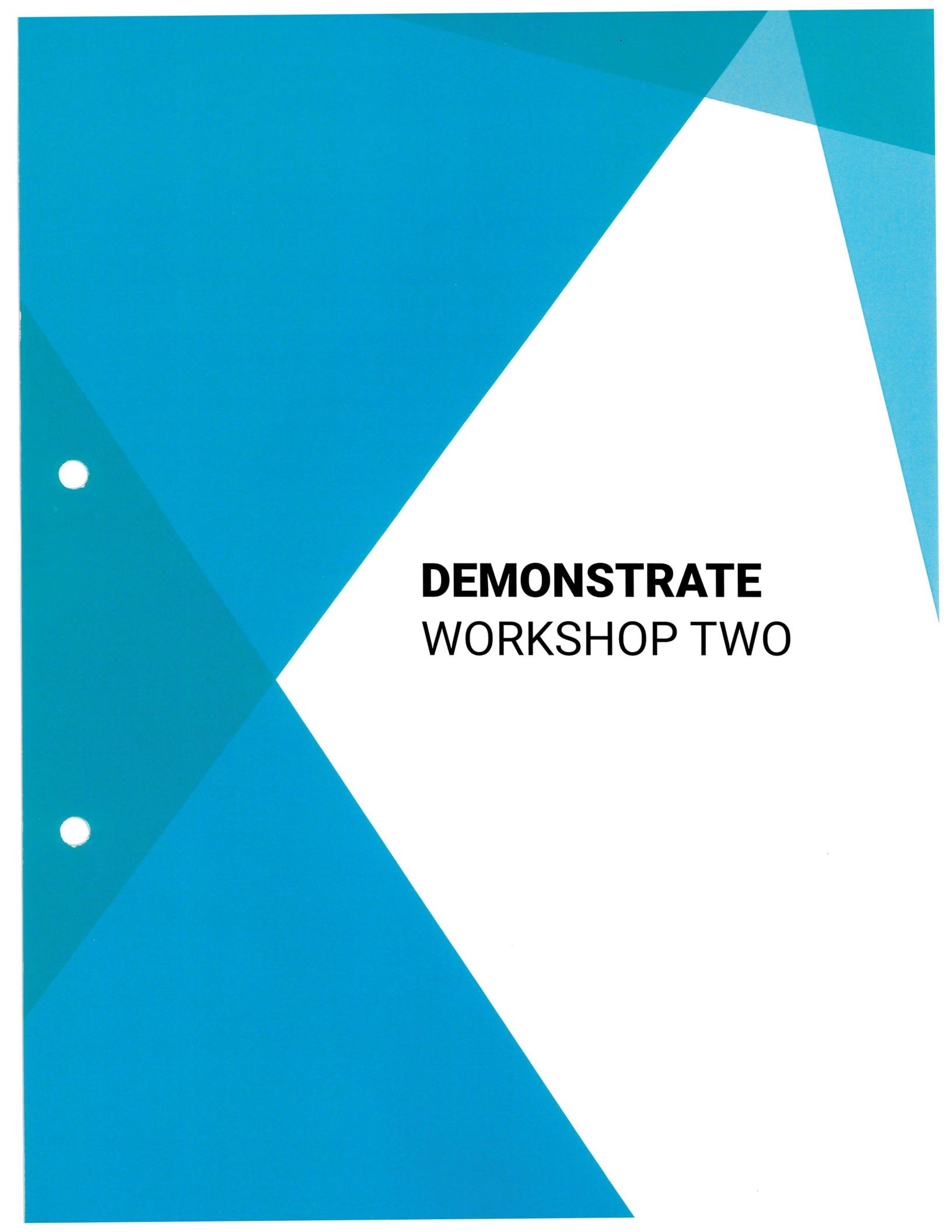
## Want to Learn More?

- The GROW coaching model,  
<https://www.performanceconsultants.com/grow-model>
- [www.coachinghabit.com/videos](http://www.coachinghabit.com/videos)
- Monique Valcour, You Can't Be A Great Manager If You're Not a Good Coach (2014) <https://hbr.org/2014/07/you-cant-be-a-great-manager-if-youre-not-a-good-coach>

## CONGRATULATIONS! YOU HAVE COMPLETED YOUR SECOND FOUNDATIONAL LEADERSHIP PROGRAM WORKSHOP!

But as we said at the beginning, this is just the first step on the road to becoming a better leader. Unless you actively and consciously apply your newly acquired skills and knowledge and make any changes to behaviors that will deliver a better outcome for YOU, YOUR TEAM and YOUR BUSINESS, nothing will happen!

Just attending a training course is not going to change anything.  
You now need to **APPLY** and **DEMONSTRATE** your learning.



# **DEMONSTRATE**

## WORKSHOP TWO

# DEMONSTRATE

## DEMONSTRATE

After you **Learn** the theory behind leadership concepts, **Explore** what it means for you, and reflect on how to **Apply** it, your last step is to **Demonstrate** your new and improved skills through your actions.

Being honest in your reflection, clear about what you plan to do differently, and deliberate about measuring progress is essential to your development as a leader.

After each workshop in the Foundational Leadership Program, you will outline clear development goals, using the workshop's learning objectives as a guide. It may feel overwhelming; focus on the objectives where you need the most development instead of what feels easiest. Your goals should not be check-the-box items; the goals should require focus, dedication and a change to your normal way of working and behaving. You'll review your goals with your manager and let your direct reports know what you'll be working on so that everyone can help you on your development journey.

**Use the space below to:**

1. Identify which learning objectives will require more of your attention.
2. Draft your goals. Remember to make your goals SMART:  
Specific, Measurable, Achievable, Relevant and Time based.
3. Record evidence (observations, feedback, etc.) and track your progress.

Identify, draft  
and record your  
initial thoughts

A large, empty rectangular box with a thin gray border, intended for the user to write their initial thoughts or goals.

# DEMONSTRATE

## Workshop 2

Category	Learning objective	Focus on:	Self-rating (1 = this needs work; 5 = I already do this well)
Communication	Cascade and translate into relatable terms any company wide messages, as and when they occur.	Us	
	Select and use the most appropriate communication tools and channels for the message and context	It	
Working with Others	*Coach self and team members through conflict to arrive at mutually agreeable solutions	Me/Us	
	*Delegate responsibilities in a way that capitalizes on the strengths of others and fosters role clarity	Us	
	* Respond appropriately to verbal and non-verbal emotional cues in order to create a safe, collaborative environment.	Us	
Managing Direct Reports	Use various recognition methods to motivate and engage, through suitable channels	Us	
	Create structure, systems, and behaviors (based on current theory) that will motivate and engage direct reports.	Us	
	*Hold development conversations in a non-directive manner, and identify and appropriately address team members' development needs	Us	
	*Understand the policies and follow the processes required to hire, performance manage, and develop the team, using the internal	Us/It	
Understanding the Business	Clearly articulate a definition of our customer journey and what customer focus means at CDK	It	
	Proactively gather external and internal customer feedback and insights, and use them to identify and develop service / customer experience improvement opportunities	It	

\* Learning objective covered in multiple workshops

### Post-Workshop Learning:

Personal	Manage your time effectively to prioritize high-impact tasks that help drive your team's performance	Me	
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# DEMONSTRATE

## Goal 1

SMART goal	
What will I work to develop?	
How will I demonstrate this skill or behavior?	
What metric will I use to gauge progress?	
When and from whom will I gather feedback or note my own observations?	
What might throw me off track?	
When will I achieve this?	

## DEMONSTRATE

### Notes and evidence

# DEMONSTRATE

## Goal 2

SMART goal	
What will I work to develop?	
How will I demonstrate this skill or behavior?	
What metric will I use to gauge progress?	
When and from whom will I gather feedback or note my own observations?	
What might throw me off track?	
When will I achieve this?	

## DEMONSTRATE

### Notes and evidence

# DEMONSTRATE

## Goal 3

SMART goal	
What will I work to develop?	
How will I demonstrate this skill or behavior?	
What metric will I use to gauge progress?	
When and from whom will I gather feedback or note my own observations?	
What might throw me off track?	
When will I achieve this?	

## DEMONSTRATE

### Notes and evidence

# DEMONSTRATE

## Goal 4

SMART goal	
What will I work to develop?	
How will I demonstrate this skill or behavior?	
What metric will I use to gauge progress?	
When and from whom will I gather feedback or note my own observations?	
What might throw me off track?	
When will I achieve this?	

## DEMONSTRATE

### Notes and evidence

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