Welcome to Hiring and Inspiring an Exceptional Team!

**<click: Once upon a time…>**

I’m Seth, and to introduce myself and explain why I feel qualified to stand up here, I want to tell you a quick story.

<click: show team>

Once upon a time, I joined the programming team at my current company. I was a pretty good programmer and I spent six or seven years on this team as an individual contributor, slowly gaining more and more technical leadership but really not *responsible* for other people.

Eventually, however, I was promoted into management.

<click: promoted to management>

My head grew a few sizes and I traded code reviews in Visual Studio for TPS reports and time sheet approvals.

<click: Things were great for awhile>

Things were great for awhile and the team seemed happy and productive. Release after release we shipped on time and it really felt to me like everything was falling into place.

<click: but all good things come to an end>

But all good things come to an end, and eventually …

<click: someone quit>

… someone quit.

Unfortunately, this wasn’t a case of someone moving on to bigger and better things, it was a case of someone hitting the end of their rope and walking out.

<click: shook>

This really shook me. This was a key employee that I really depended on, and who I had thought to be happy and challenged in their job. I was taken totally by surprise.

<click: uncomfortable>

This was my first real blow as a manager, and the first real blow to the team I’d started to lead. I had to face the uncomfortable truth that it *wasn’t* sunshine and rainbows for everyone.

<click: lets fix it / got to work >

But then we worked hard to address those issues. The team had some frank conversations about morale and stress and implied vs explicit expectations.

<click: things improved>

And as a result of those efforts, things got better. We identified some issues and fixed them. There was no management consultant brought in to “turn the ship around”, it was just a situation of a group of people working to improve their own working conditions. And honestly, I think that’s pretty exceptional.

<click: … and then …>

I’m happy to report that this story has a happy ending! A few months later, the person that had quit came back.

<click: hey team, haz job>

It turns out that a few months on another team made him realize that while we aren’t perfect, we really do have a great team, and it was one he wanted to continue to be a part of.

<click: yay>

And we welcomed him back with open arms. The end.

**<click: cool story bro>**

So what’s the point?

My point is that I have firsthand experience with an exceptional team. I’ve been with this team at its best, and I’ve been with this team when it’s struggled, and that experience forms the basis of this talk.

**<click: my exceptional team (cicles)>**

One of the reasons I think my company is exceptional is that when we find the right people, they stick around.

<click>

Seven people out of 20 have over 10 years of service with the company.

<click>

On the team that I run, the average tenure is 6.5 years, which is like 6 programmer lifetimes or something.

<click>

And over our 20-year history, 5 people have left for various reasons and then come back.

**<click: my exceptional team #2>**

We’re exceptional in other ways as well. We predictably ship quality software, on time, by working together as a team.

Those people that have left and come back tell us that these are rare qualities on software teams, and these are the qualities that bring them back.

But another reason that we’re exceptional is that we always want to get better, so when that valued employee left, I found myself wanting to better understand what I was doing well as a leader, and what I could do differently going forward.

Since then I’ve read a lot of books and listened to a lot of podcasts and I’ve combined my experience on this team with that research to put together a 4-step model for building and maintaining an exceptional team.

**<click: agenda>**

This is our agenda today:

* How to hire team players that are aligned with your core values
* How to get off on the right foot with a new hire
* How to build relationships with your existing team through effective 1-1s
* How to use DiSC profiles to motivate and communicate with your team

This model is basically the formalization of the things I’ve been doing for many years, but informed and supported by research.

**<click: agenda, #1 highlighted>**

Let’s start by talking about hiring.

As a manager, one of the most impactful things that you can do is to make sure that the organization hires and retains the right people. The phrase “garbage in, garbage out” really applies here; every bad hire reduces the quality of the output of the people around them, so it’s really important to get the right people to start.

I’ve been successful in this area by focusing my recruiting efforts on team players that share our corporate and team level values. We attribute the longevity of people’s careers with us to how well we’ve integrated our core values into the recruiting process. When you hire people that are naturally aligned with you they feel more at home, they’re more likely to make the correct knee-jerk reactions and snap decisions, and they are less likely to chafe at the less than perfect aspects of your company. No company is perfect, every team has rough edges, but when people feel aligned with the values of their company and team, then tiny irritants are far less likely to blow up into big problems.

**<click: ?>**

So what *are* yourcore values?

If you can’t point to a random person on your team and ask them to explain how a recent decision they made is or is not consistent with your team values, then you have some homework to do. It’s going to be really hard to build an effective team around a set of shared principles if you haven’t identified or socialized those principles.

Guiding you through that process is a whole workshop on its own, so it’s a bit out of scope for this talk. However, there are a ton of different websites out there with exercises that you can do to surface these things.

For today, let’s pretend that you and your team already have shared values, or you recently purchased a ton of post-it notes, went through one of those values identification rituals, sang Kumbaya together, and came up with a list. What’s next?

**<click: team players quote>**

Let’s talk about teamwork next.

Selecting candidates that align with your core values is a great way to find individuals that are compatible with your way of thinking or working. That’s a *necessary* part of building an exceptional team, but it isn’t *sufficient* on its own. Core value alignment is a strong signal that a candidate would be successful *if you hired them to work alone*.

But to really have an exceptional *team*, you have to have a collection of people that do more as a unit than they would on their own. Life happens; people get sick, people get burnt out, people have good days and bad days and sometimes they’re just killing it and other times they can’t get out of their own way. If you hire a bunch of talented individuals then you’re constantly at the mercy of all of those events. But if you hire a *team* that works together, then all of those things start to even each other out. Alice might be having a terrible day, but Bob can step in and help. In the future Bob gets sick, but Karen volunteers to work late and pick up his slack.

If you want to be a great manager, then build groups of team players with a common purpose.

And if you want to hire team players, then you need to look for teamwork traits in addition to your core values and principles.

**<click: Ideal Team Player>**

There’s a book called “The Ideal Team Player” by Patrick Lencioni that I really highly recommend. I like his books because he uses parables to make his points, and that layer of narrative fiction makes the books much easier to consume while I’m driving or working out than your typical business book.

In the book, he identifies 3 characteristics that are shared by the best team players.

<click: humble>

First, team players are *humble*. This doesn’t mean they aren’t confident or self-assured or think less of themselves, they just think of themselves less. They’re open to new ideas and they aren’t selfish.

<click: hungry>

Second, team players are *hungry.* They have goals and they *go after them*. As a manager, you want hungry people on your team because they are going to give you forward progress. At least, if you’ve properly aligned their goals with your overall team goals.

<click: people smart>

Lastly, team players are *people smart.* These are the folks that have enough emotional intelligence to have healthy interactions with other people.

This is why exceptional teams always have a “No A-Holes” rule. It doesn’t matter how smart you are, how good of a programmer or tester or designer you are, it doesn’t matter how productive you are personally, if you’re an A-hole, then you’re doing damage to everyone around you, and that damage becomes a drag on the overall team effectiveness.

It’s important that you get all 3 characteristics because they balance each other out.

<click: The Pawn>

Candidates that are humble, but lack people smarts and a drive to succeed, are easily taken advantage of and don’t deliver a lot of value.

<click: The Bulldozer>

People who have that drive to succeed, but no humility and no people smarts, are bulldozers; they may get a lot done, but they’re going to be focused only on their own success and aren’t going to help a team work together.

<click: The Charmer>

Candidates with people-smarts tend to interview well because they are likeable and charming, but without hunger they won’t deliver a lot of value on their own, and without humility they won’t be interested in making sacrifices for the team goals either.

<click: Accidental Messmaker>

If a candidate is only lacking people smarts then they might make a good hire, except that these are the people that might miss social cues and struggle to create the strong interpersonal relationships that help a team “gel” into a functional unit.

<click: Loveable Slacker>

Candidates with emotional smarts and humility tend to be fun to have around, they care about their teammates and are willing to help, they establish good relationships, but at the end of the day they just don’t have a hunger to succeed. This makes them a loveable slacker.

This is actually a really, really damaging type of person to hire. They aren’t going to push the team forward, they aren’t going to produce a whole lot, and their colleagues are going to have to pick up their slack. But at the same time, because they’re so loveable and likeable, it can be hard to fire them.

If you’re the kind of manager that likes to be liked by your team, and you’re squeamish about holding people accountable to productivity standards, then you need to be super careful to avoid hiring Loveable Slackers.

<click: Skillful Politician>

Lencioni says that the most dangerous combination of traits is smart and hungry, but without humility. These people are like politicians; they’re skilled at working with people and they have a lot of drive, but they’re primarily focused on themselves. They may seem like they’re a strong team player, but when faced with a choice, these people will always make the decision that benefits them personally. That sort of “lone wolf” personality can make it really hard to maintain a culture of teamwork.

<click: all three>

If you really want to build an exceptional team around the values of teamwork, then test for all three teamwork traits during the hiring process.

**<click: interview meme…>**

So step 1 in this model is to hire team players that are aligned with your core values.

That sounds great, but *how* exactly does one go about doing this?

The traditional interview setting, where a candidate sits down in your office and tells you about their greatest strength and weakness, is not very effective at this. It’s great if you want to see the candidate the way they want you to see them. It’s great if you want to hear them tell you that they are team players and would be happy on a team with your values.

Of course they’re going to tell you that, because they want the job that you have to offer them. This doesn’t mean that they’re necessarily lying, either. In that moment, when the candidate is doing everything they’ve practiced to come across as desirable, they may even *believe* that they would be happy on your team and that they would be a team player. They may have every positive intention of doing those things, but once you hire them and they get acclimated, people return to their true nature.

So if you want to hire the people that truly share your values, and that truly possess those key teamwork traits, then you need to look for *evidence* of those things in the candidate’s behavior, in their experience, and in how they talk about other people in addition to how they talk about themselves.

**<click: get out from behind the desk>**

The first suggestion is to get out from behind the desk.

Lencioni suggests conducting nontraditional interviews by taking a candidate out to run errands, or attend an event of some sort.

Charles Schwab’s CEO has been known to take candidates out to a restaurant and asks the waiter to deliberately mess up the order, in order to assess how well the candidate reacts to mistakes or stress.

Richard Branson once disguised himself as a taxi driver to drive some candidates from the airport to his house for an interview. People that were rude to him while in disguise didn’t get a job offer, because he believed that how they treated folks in a service role was a strong indicator of their real character.

Zappos does something similar; they have a company shuttle drive candidates around the campus, and the hiring manager checks in with the shuttle driver at the end of the day to ask how they were treated. Like Branson, the Zappos people believe this tactic helps them determine if a candidate is really a nice person, or was just faking it for the interview.

And at a company called TechnologyAdvice, candidates play a few games of ping pong with a specific employee. This person is a skilled player that starts out easy but slowly ramps up the difficulty as the matches continue, giving the interviewer a chance to assess how the candidate handles a loss and their willingness to try new things under pressure.

The actual approach you take will depend heavily on the values you’re looking for and your existing interview process, but even something as simple as taking a candidate for a walk in a nearby park is enough to shake things up and give you insight into their true personality, rather than the façade they put up through their resume.

**<click: eliminate siloed interviews>**

Another tactic you can try, especially if getting out of the office isn’t feasible, is eliminating siloed interviews.

For instance, at Heuristics, multiple people are involved in the interview process, and we have a debrief between each round. If someone early in the process has concerns about a candidate’s “people smarts”, subsequent interviewers can adjust their questions to spend more time in that area.

In addition, the very last step in the process for us is a panel interview of the candidate’s peers, *without me in the room*. The panel format lets multiple form an assessment on that person, and then we debrief as a group.

In the end, by layering all of these assessments together and treating the interviews as a collaborative process, rather than a siloed process, we get a much more comprehensive picture of the candidate.

**<click: scare them with sincerity>**

Another tactic is the idea of “scaring them with sincerity”.

Let’s say that one of your core values is community engagement, and you have a candidate that you *think* shares that trait but you’re not sure.

Before making an offer, tell her that you are absolutely and fanatically committed to community engagement, and that if an employee somehow made it through the interview process but did not share that commitment, they would be miserable working with you. Let candidates know that they would be called out for their anti-community behavior again and again. And assure them that if they *do* share that commitment, work would be fantastic for them.

Many people will try to get a job even if they don’t fit the company’s stated values, but few will do so if they know they’re going to be held accountable to those values day in and day out.

And if a candidate is so scared by your sincerity and dedication to those values that they decide to self-select out of the interview process at this point, that’s awesome. You saved time, not to mention the money that you saved by not hiring someone that wouldn’t last very long.

**<click: back to agenda, #2 highlighted>**

OK, lets pretend that you’ve done all of those things, you put out this great job ad, you whittled it down to some team players, and you picked the best one. Today is their first day, and they show up in your office all bright-eyed and bushy-tailed. Now what?

I like to devote some time that first week to an exercise called “Design the Alliance”.

<click: first two sentences>

The idea here is that the most important first step to take is setting up a foundation for effective communication with the newbie. If they don’t understand how to approach you, then they’re going to waste a lot of time trying to figure it out. And if you don’t understand how they work, then you’re going to have a hard time setting them up for success. There is literally no problem that your employees can have that isn’t made *worse* by an inability for the two of you to communicate effectively.

The point of “Design the Alliance” is to help each of you understand the other’s preferred styles of communication and working, so that you can collaboratively approach any gaps or conflicts in your styles *before* they become issues.

<click: second two>

If you’re a stickler for starting meetings on time, but you just hired someone that likes to get into the zone and go deep down the rabbit hole when working on something, then you have a potential problem! It’s so much easier to identify those things up front.

**<click: Design the Alliance, #2>**

The exercise itself is really simple. There’s just a list of questions that you both answer, and then you talk about any obvious conflicts.

The actual questions that you ask should be tailored to your specific situation, but here a few that I like:

1. Interaction Style – is it OK if I call you directly, or should I try you on chat first? Do you like frequent checkins, or more limited?
2. (click) View on deadlines – if there’s a deadline of Friday at 5pm, do you prefer to submit an incomplete deliverable by the deadline, or do you prefer to delay until Monday so that you can improve it or finish it?
3. (click) Personality assessments (DiSC, Myers-Briggs, etc) – Do you know your assessment?
4. (click) How do you measure success? What sorts of information do you need to feel like you’re making a difference?
5. (click) How can I tell if you’re stressed, angry, or upset?

As the manager, you should answer each question first, and then give your new hire or colleague a chance to answer next.

**<click: take notes!>**

Here’s the most important thing: write down your notes! This is your roadmap for how to behave in this particular relationship, so don’t trust your memory.

I have a OneNote notebook for each person on my team, and in this notebook I keep my Design the Alliance notes. About once a quarter, while preparing for a 1-1, I’ll refer back these notes and reflect on how things are going.

**<click: back to agenda, #3 highlighted>**

Let’s fast-forward again and pretend that you placed your job ad, you found the ideal team player, and you’ve designed the alliance and developed a plan for how you’re going to communicate going forward.

The next step is to set up regular, routine 1-1s with your team.

<**click: effective 1-1s (purple disc #1)>**

Quick question: how many of you meet with your boss at least once a month to talk about how things are going for you?

Anyone meet with your boss at least twice a month? How about weekly?

<click: 94%...>

A 2019 study of 200 managers over 31 different industries found that 94% of those managers have *some kind* of 1-1 with their directs.

<click: 82%>

And of those managers that have 1-1s, about 49% have them weekly and 33% have them bi-weekly, and

<click: 71%>

71% of the 1-1s last 30 or 45 minutes.

<click: uncountable>

The point is, experienced managers know that regular, effective 1-1s provide innumerable benefits. I don’t want to bludgeon you completely to death with statistics, but…

**<click: purple circle slide #2>**

A Gallup study found that 70% of the variance in employee engagement is caused by the person’s manager. As a manager, you can have a bigger impact on employee engagement than any other factor.

**<click: engagement stats>**

Another study of 2 Fortune 100 companies found that employees *without* a regular 1:1 are 4x more likely to be *disengaged* than their peers.

<click: stat 2>

A different study across millions of employees found that those *with* a regular 1:1 were 3x more likely to be actively *engaged* than their peers.

<click: engagement circles>

What’s the big deal about “engagement”? That same Gallup study associated high levels of employee engagement with a 22% increase in profitability, a 21% increase in productivity, and a 65% lower voluntary turnover rate.

**<click: #1 reason>**

And lastly, a leadership study by Dale Carnegie’s found that “bad management” is the #1 reason people gave for switching jobs.

There is just overwhelming evidence that regularly occurring, properly conducted 1:1s are one of the most effective things that you can do as a manager to improve your team. If you take nothing else from this session, let it be this:

**<click: cannot have exception team without>**

You cannot have an exceptional team without regular 1:1s.

**<click: what’s the goal?**>

That 2019 study of 200 managers asked them to identify the goals of their 1:1 meetings. This is where I see a discrepancy between what managers are *actually* doing and what they *should* be doing.

<click: highlight status update>

The biggest issue that I see in these results is that 54% of the managers that responded to the survey have identified status updates as a *goal* of the 1:1.

All of my research on 1:1s says that they should be about the *person* and their role in the organization, not the specific *tasks* they are working on. It should be about building relationships and making sure the person’s role is aligned with the organizational objectives. Those types of conversations are investments in future productivity; status reports don’t move the needle.

**<click: what’s the agenda>**

I use the 1:1 format recommended by the Manager Tools podcast.

They recommend meeting weekly for 30 minutes, where the first 10 minutes is the *employee’s* time to talk about whatever they want, the next 10 minutes is *your* time to talk about whatever *you* want, and then there’s a 10 minute flex period to give you time to explore something in more detail if needed.

<click: their agenda>

This part, about explicitly carving out time for *their agenda*, is important. A regular 1:1 gives people a chance to bring up minor irritants *before* they turn into major blisters.

Have you ever had something that was annoying you, or frustrating you, but your boss is really busy and it seemed kind of trivial and not worth bothering them about, so you just didn’t say anything?

The catch-22 of engagement and morale issues is that they are easy to fix when they’re small, but when they’re small they don’t always seem worthy of the effort. But if you ignore those problems when they’re small, they can turn into big problems that are much harder to manage.

When you have explicitly carved out 10 minutes, once a week, for the employee to talk about whatever they want, they don’t have to worry if something is “trivial enough to bother you”.

<click: animate “what’s on your mind”>

My favorite way to start off this part of the 1:1 is to simply ask, “what’s on your mind today”? If they’ve prepared an agenda then they can launch into it, and if they *haven’t* prepared an agenda, then at least you’re able to help with whatever is top-of-mind for them at that particular moment.

**<click: your agenda>**

When it’s your turn, you’re going to want to do one of two different things:

1. Either you’re going to ask some questions that will help you get to know the other person and establish a relationship, or
2. You’re going to use the relationship that you already have to give them some specific coaching or feedback that you’ve prepared.

Again, don’t use your agenda to give project-level status updates. Use your agenda to *build the relationship* by asking questions, or to *change future behavior* by giving feedback.

**<click: engagement stats**>

Early on, you’re going to want to spend a lot of your time building rapport and trust.

A Gallup study found that employees were significantly more engaged when they felt that they could talk with their manager about nonwork-related issues and with a wide variety of questions.

This is beyond just being “friendly”, though. Being a manager means that you have this thing called Role Power, because you are in a role that is responsible for promoting a person, as well as firing them. This concept of Role Power is threatening to an employee and it pervades every interaction that you have with them. Simply being nice and friendly and polite isn’t enough to counteract it; if you want your people to trust you, you have to demonstrate a real and authentic interest in them as a person.

**<click: build rapport>**

There are a lot of different questions that you can ask to build rapport and trust. You can ask about their life outside of work. You can ask about their family. You can talk about their interests.

I once spent an entire 1:1 talking to my designer about video games because she’s a big first-person shooter fan. There is very little practical, work-related value to a conversation like that, except that it deepened our relationship with each other.

TODO: Relationship piggy bank

**<click: career dev slide>**

Another great topic for your agenda portion of the 1:1 is career development. In a recent survey of millennials, training and development was the #1 most-valued benefit from an employer. Making sure that your people feel like they’re growing is a great way to retain them, and it’s a great recruiting tool as well.

Every 3rd or 4th 1:1, ask questions about their career development.

**<click: career dev questions>**

Any question that shines a light on their career aspirations is helpful, but I like these two the most.

<click: 1st Q>

Asking which aspect of their current work is inline with their long-term goals is nice because it tells you where to focus your future feedback; helping someone get better at the work that’s most aligned with their future goals will be of greater value to them than helping them improve at something that isn’t aligned.

<click: 2nd Q>

Asking about roles they’d like to learn more about is helpful because it naturally identifies people that can serve as mentors or pairing partners.

**<click: improving the team**>

A third line of questioning that I really like is asking about improvements to the team or the company.

Your team members are the people in the trenches doing the work, so tap into that perspective during your 1:1.

<click: 1st Q>

I like asking for ideas on how to improve something specific, such as how meetings could be more effective, because it gives you a chance to evaluate their critical thinking skills. If all of their suggestions would make *their* life easier, but don’t consider how those changes would impact anyone else, then that’s a clear sign that they aren’t ready for additional decision-making responsibilities yet. But if their suggestions demonstrate an awareness of the big picture, then they might be ready for taking on new decision-making responsibilities.

<click: 2nd Q>

I also like asking about specific interactions with other people, like who on the team they have the most (or least) difficulty working with. This is a great question because it can clue you in to personality conflicts that you were totally unaware of, and if gives you the opportunity to coach all of the involved parties before it turns into a big problem.

**<click: feedback>**

Asking questions is a great way to get to know the other person, to establish trust and rapport, and to identify specific areas of career development they’d like to focus on.

Eventually, however, you have to stop asking questions and start giving feedback or you’re not going to provide any real value back to the employee.

**<click: feedback graph>**

On average, most people want feedback either monthly or quarterly, with millennials favoring a more frequent feedback loop than non-millennials.

If you’re waiting until an annual performance review to give someone specific feedback about what they’re doing well and what they need to improve, you’re really not helping them *or* yourself. More frequent feedback means even more of the behavior that you praise, and much faster improvements in the behavior you want to change.

**<click: feedback questions>**

Giving effective feedback is a skill that you need to practice. If you just wing it, you’re liable to do more harm than good; the other person might not understand what you mean, or they might take offense or get angry.

The whole point of feedback is to change *future behavior*. You can’t do anything about what’s happened in the past, you can only affect the future.

If you give someone ineffective feedback that they don’t understand, or if they get so upset at the feedback that they can’t truly hear your suggestions for what to do next time, then you’re not going to get the future behavior that you want.

There are three steps to giving effective feedback.

<click: prepare>

The first step is to prepare.

Good, constructive feedback requires preparation on your part. When you give someone feedback, they’re going to ask you questions. Maybe they’re being defensive, maybe they truly want to understand the situation, but either way they’re going to want more information.

To prepare for that, ask yourself questions like:

1. When did this happen? What is the context?
2. Is this an isolated event, or has it happened repeatedly?
3. Why is this important? How does this affect others?
4. What do they need to do differently going forward?

Take a few minutes and prepare, and you’ll dramatically increase the chances that they take away the right things from your 1:1.

**<click: step 2, listen>**

Constructive feedback is a conversation, not a drive by. You not only need to prepare and bring notes to discuss, you also need to make it a *conversation*. You don’t always know the full context of what happens, so assume positive intent and listen to their side of the story before you go too far into your feedback. There may be mitigating factors that, once you’re aware of them, help you avoid sticking your foot into your mouth.

You can do this by asking WHAT and HOW questions like:

* “What’s been your main focus lately?”
* “How is project X going?”
* “How do you feel your workload is right now?”

The reason is, “what” and “how” questions get people talking more than yes/no questions do, and they’re non-accusatory. If you just start out asking “why” someone did something, it can feel like an attack and can generate resistance or a “fight or flight” mentality.

**<click: step 3, act>**

Again, the whole *point* of feedback is to *change future behavior*. In order to do that, you have to clearly establish next steps. If you don’t clearly articulate what you want someone to do differently in the future, then all you’ve really done is got the feedback off your chest. To actually make a difference, you have to *act*.

When you want someone to change or improve something, you need to be explicit. Do you want them to spell check their work before sending it out? Do you want them to send you a draft to review? If so, when? Is there a specific document or process they need to reference the next time they do a task? Is there a specific output that you want them to produce as they do their work?

The more specific you make the next steps, the more likely it is to happen. And if there are things that you can do to support them in those next steps, that’s even better; not only do you get the behavior change that you want, but that improves the relationship as well.

**<click: be redundant!>**

As awesome as it would be to only have to give feedback once, and then move on and forget about it, people just don’t work like that. A study of managers by professors from Harvard and Northwestern found that managers who were deliberately redundant with their feedback moved their projects forward faster and more smoothly thatn those that weren’t.

So, once you’ve given that feedback, repeat yourself in a variety of ways:

* Followup over email. Clearly document what was said and provide a written audit.
* Check in on the next 1:1.
* Keep it top of mind. The more clearly you’re checking in on their work in this area, the more likely they are to improve at it.

**<click: remember the alliance>**

And through all of this, no matter if you’re asking questions or giving feedback, *remember the alliance you designed back in step 2!*

I like to refer to my notes before giving any significant feedback so that I can make sure that I’m providing that feedback according to the alliance I designed with each person.

**<click: take digital notes>**

My final piece of advice around 1:1s is to *take digital notes*. This stuff is super important, don’t trust your memory, and don’t trust scraps of paper that are easily lost. Come up with some sort of electronic note-keeping system, whether it’s just a series of OneNote notebooks or dedicated management software, to help you stay organized.

Your 1:1s are only as effective as your ability to remember what you talked about last time. Don’t ask people to sit in a 30 minute meeting with you if you can’t commit to the 60 seconds it takes to jot down notes for next time.

**<click: agenda, #4 highlighted (DISC)>**

OK, great. So now you’ve posted that awesome job ad, you hired a team player aligned with your values, you designed the alliance and mapped out a strategy for working together, and you’ve set up weekly 1:1s to build relationships and keep your people aligned with the organization’s goals.

Unfortunately, you’re still not done. You still need to explain the business objectives to your team, tell them what they need to do, motivate them to take action, and provide ongoing communication that keeps everyone engaged.

<**click: DISC intro (megaphone)>**

Unfortunately, that’s easier said than done. People are very different from each other, not everyone thinks or works the same way, and it can be very difficult to communicate with a disparate group of people in a way that is equally effective and motivating for each person.

I learned this the hard way early in my management role. We were adopting a new time reporting system and there was a lot of uncertainty around how people should use it. One of my jobs was to review my team’s time and make sure that it was being billed correctly, so that invoicing and cost accounting could be performed. However, the uncertainty around the new system meant there was a lot of inconsistency in the reported time, and that was making it hard for me to review timesheets.

Now, I’m a detail-and-process-oriented person. I personally like it when there are clearly defined standard operating procedures, and when those procedures explain their objectives, and when the procedures themselves logically support those objectives.

So, I did what I would have wanted my manager to do for me in that scenario. I wrote a long, lengthy email that described in great detail how I wanted the team to enter their time. I used lots of bold and underlined text to draw attention to the key details, and I went to great lengths to explain the reasons behind all of my requests.

I remember feeling very proud of that email when I sent it, because I felt like it was clearly setting a standard for the team to follow and would eliminate all of the uncertainty and negativity that people were experiencing around this new time system.

Turns out, surprise, that not everyone thinks like me. There were maybe one or two people on my team that thought the email was fine, but I found out later that most of them *hated* it. They found it to be *de*-motivating, micromanaging, and overly corporate.

I bet there are people in the room right now that could get an email like that, read it, lock it away in their brains, and move on unphased. But I bet there are *also* people in the room right now that would get an email like that and have it feel like nails on a chalkboard to them. And nails on chalkboard messages are not a great way to get people to change behavior.

Wouldn’t it be awesome if there was some way to classify yourself and your team into different archetypes that could then provide guidance on how to communicate with your team, how to motivate and inspire them, and how to resolve conflicts, all tailored to the individual personalities involved?

**<click: communicate effectively using DiSC>**

That’s the point of DiSC.

Has anyone here heard of DiSC before? Has anyone heard of Myers Briggs?

DiSC profiles are similar to Myers Briggs type indicators, but a bit different. A Myers Briggs type is primarily an indicator as to how someone *thinks*, while DiSC measures how personality traits affect external *behavior*. Myers Briggs assumes that personality is fixed and unlikely to change, but DiSC is more open to the idea that people behave differently in different contexts.

For instance, my Myers Briggs type reflects that I’m naturally an introvert because I am recharged by having time to be left alone in my own head. However, my role requires me to interact with people a lot, so I’ve had to adjust my typical workplace behavior accordingly.

Because DiSC focuses more on behavior than innate preferences, and because the DiSC assessment is shorter to take, it’s easier to implement in a business context than Myers Briggs.

**<click: show DiSC squares>**

The DiSC model focuses on 4 dominant profiles that indicate how people tend to behave in a particular setting.

**<click: D>**

The D stands for Dominance. People with this profile are strong-willed and results-oriented and place a lot of emphasis on the bottom line. You tend to see a lot of D personalities in leadership roles.

**<click: i>**

The I stands for Influence. People with this profile place emphasis on influencing or persuading others. They are often outgoing and enthusiastic and are good in sales and management roles that leverage their influential traits.

My friend Jared is a strong I. If he needs to solve a problem, the first thing he does is make a list of all the people he knows that he could get to help. I types tend to achieve results through other people.

**<click: S>**

The S stands for Steadiness. People with this profile place are even-tempered, calm, and dependable and place emphasis on cooperation and sincerity. In many ways, S types are an opposite of the results-centric nature of a D.

**<click: C>**

Lastly, the C stands for Conscientiousness. People with a C profile are analytical and systematic and make great project managers and technical analysts.

C types are the opposite of I; whereas an I will achieve results through other people, C types tend to achieve results through their own detailed work.

**<click: wheel image>**

In reality, everyone has some characteristics of all personality types, just in different proportions. Most people have one or two dominant types that can be visualized on a graph like this.

D and I types have a lot in common; both are bold, fast-paced and assertive personalities so there is a lot of overlap between them. Someone that is primarily a D with strong I tendencies would be a “DI” on this graph. Similarly, someone who is a primarily an I with D tendendcies would be an “ID”.

D also has a lot in common with C, because both are task-focused, logical, and challenging. There are CD and DC types that reflect different proportions of these characteristics.

It’s also possible for someone to have traits from opposing profiles, such as a DS or a CI. Those are less common, however.

**<click: move circle to left, show bullets>**

To reiterate, everyone is a blend of all four styles, although most people have one or two clearly dominant sides, and no style is “better” than another.

<click: show final bullet>

To find your style, go to discprofile.com and take one of their assessments. You can find free assessments on the internet, but discprofile.com offers paid assessments that are specifically designed for managers. They’ll give you a very detailed assessment of your personality type and will provide a report containing all sorts of insight and suggestions.

<**click: show CD “I am here”**>

I took the assessment and it told me that I am a type CD, which means that I’m primarily a C with some fairly strong secondary D characteristics.

Typically, people with this personality type have high expectations of themselves and others, are logical and task-focused rather than emotional and people-focused, and generally get irritated at people or situations that are illogical or overly emotional.

**<click: distance to edge>**

The position of this dot is meaningful. The closer the dot is to the edge of the circle, the more strongly inclined a person is towards the stereotypical aspects of their type.

In my case, this dot is very close to the edge of the circle, so the report is claiming that I am very likely to exhibit these traits and behave in a manner that is consistent with my type.

And if any of you have ever worked with me, you’d know that this is pretty spot-on. Honestly, I don’t think people that have known me for years could have written a more accurate assessment of my personality than the report that discprofile.com generated for me.

**<click: directing and delegating>**

I can use my DiSC report to be a better manager in a few different ways.

The shading in this graph shows my priorities, which is how I spend my energy. You can see that my 3 primary priorities are:

* Displaying Drive
* Offering Challenge
* Ensuring Objectivity

This means I’m good at setting high standards and solving problems and challenging my team to focus on accomplishment and results.

However, I don’t naturally spend much energy on things such as Encouragement, Collaboration, or Support. I specifically struggle with giving feedback that doesn’t feel overly critical and with displaying empathy.

That means that my team, especially the I and S types, may feel like I’m *too* focused on forward progress and may get burnt out or discouraged over time.

But remember, DiSC is all about behavior; this graph shows me what I’m likely to do by default, but I can adjust my behavior accordingly. Knowing my DiSC type means that I can deliberately spend energy on being collaborative and supportive. I can practice giving feedback so that it feels more natural. I can work to appear more empathetic and a little less robotic.

**<click: delegating to D>**

The DiSC model is also really useful if you know some of the types of people you interact with.

For instance, let’s say I’m working with someone on my team that I know to be a strong D. The DiSC model tells me that they are going to be more goal-oriented than task-focused, so they might struggle to put together the sort of detailed work-breakdown-structure that I would create.

<click: show the list>

My DiSC report reminds me to focus on the D personality’s Drive and Action tendencies and provides these suggestions for delegating to them:

* Because the D type is goal-driven, it’s super important to make sure we agree on that goal, so I’d probably focus on the high level objectives to start.
* In addition, D types tend to desire freedom to make their own decisions, so it’s important that we agree on the limits of that autonomy up front.

For instance, if I’m handing off a technical project I might share the overall objectives, establish a budget or other constraints, tell them that the architectural decisions are theirs to make, but that they should send me a summary of any departure from our standard patterns so that I can stay in the loop.

**<click: delegating to an I>**

If I’m working with an I personality, the DiSC model tells me that they tend to be upbeat and optimistic, which is at odds with my natural sense of skepticism. In addition, these individuals generally desire more recognition than I am naturally be inclined to give. (Remember that graph had very little shading in the Encouragement area)

By identifying those differences, the DiSC report suggests that I delegate to an I type by helping them to prioritize their tasks, by acknowledging their contributions publicly, and to make sure that my feedback and coaching methods aren’t interpreted as micromanaging. For example, I might schedule more frequent check-ins with an I than with a D, while still making an effort to give them space to explore their more adventurous ideas.

**<click: delegating to an S>**

People with the S style are accommodating and flexible, so they seem easy to direct. However, they are cautious when approaching projects and may not share my drive for individual achievement, so I have to be careful about growing impatient with them, or appearing to be critical or argumentative.

The best way for me personally to delegate to an A is to give clear step by step directions, to seek and incorporate their input, encourage them to take initiative, and to check in frequently to minimize ambiguity and eliminate surprises.

**<click: delegating to a C>**

I find C types the easiest to manage because they are most like me, which means that it takes the least amount of effort for me to imagine how they’re going to respond to any given piece of feedback or decision.

The biggest challenge I face with C types is that while I share their desire to analyze options logically, I’m very concerned about reaching decisions efficiently. I sometimes struggle with impatience when someone spends too much time weighing options or doing analysis, but (like I would in their place), they can become frustrated if I pressure them to rush their efforts.

My DiSC report suggests that the best way for me to delegate to a C is to give them space to work independently, checking in only to make sure they are making the necessary progress and aren’t bogged down in details. Since C types work really well when given a clear deadline, so my job as a manager is to make sure that those deadlines and deliverables are well articulated and reasonable so that the person can manage their own time accordingly.

**<click: swordfight image>**

DiSC profiles can be especially useful for negotiating conflict and disagreements because they give you the insight into each person’s own motivators and stressors, which is super helpful when you’re looking to achieve consensus or resolve a problem. I don’t have time to get that deep into DiSC, but if you get one of those reports from discprofile.com it will contain insight in this area as well.

**<click: remember the alliance >**

Again, remember the alliance you designed back in step 2! Before confronting any of my team members with issues or problems, I like to review my notes on them. A few minutes reflecting on their DiSC type, if I know it, and how they like to be managed often goes a long way towards helping me craft a conflict resolution strategy tailored specifically to that person.

**<click: wait… does everyone>**

A common question is whether or not your entire team needs to take a DiSC assessment.

<click: nope>

The simple answer is “no”. There is plenty of value in the DiSC model even if you, as the manager, are the only person on the team that ever takes an assessment. And once you understand the model, you can probably at least guess someone’s *primary* type based on how they behave.

Before you roll this out to your entire team, do it strategically. Focus on your senior people or the people you’re most interested in retaining. Or, if someone is in line for a promotion, have them take the assessment so that you can leverage the DiSC model throughout the promotion process.

**<click: key takeaways>**

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TODO

<https://getlighthouse.com/blog/the-elephant-and-the-rider-motivate-your-team/?utm_content=bufferbf72a&utm_medium=social&utm_source=twitter.com&utm_campaign=buffer>

Flywheel concept: hiring for values makes it easier to hire for values

<https://getlighthouse.com/blog/11-meetings-value-make-most/> 🡨-- statistics

Graveyard