Welcome to Hiring, Firing, 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, and life was good.

<click: Things were great for awhile>

Things were great for awhile and the team seemed happy and productive. I encouraged them to be open and honest with me about problems they might have, no one said anything, and so I believed there not to *be* any problems.

<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 instead of letting things fester, we worked hard to address those issues. I did a lot of research. I did a lot of introspecting. The team began talking about things like morale and how we interacted with each other through our work.

<click: things improved>

And you know what? Things got better! We identified some issues and fixed them. We strengthened our relationships, and it feels like the team really is productive and healthy now.

<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>

A few months working elsewhere made him realize that while Heuristics isn’t perfect, we really are an exceptional group, and he really wanted to be part of it.

<click: yay>

So 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, and that experience is why I feel qualified to give 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. Seven people out of 20 have over 10 years of service with the company. On the team that I run, the average tenure is 6.5 years, which is like 6 programmer lifetimes or something. 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 have a culture of shipping 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 are a big reason that they chose to come 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 wondering what I might have done differently as a leader to have made them less likely to leave in that way.

Since then I’ve read a lot of books and listened to a lot of podcasts and through that research I’ve put together a 5-step model for building and maintaining an exceptional team.

**<click: agenda>**

My agenda today is to share this model with you and to give you some specific advice in each of these 5 areas:

* How to identify the right people to hire from your recruiting pool
* 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 improve your communication
* How to inspire and retain your team by giving them autonomy, mastery, and purpose

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

**<click: stuff you don’t know you don’t know>**

I want this talk to be more than just a random collection of tips from some guy at a conference, so as part of this talk I’m going to introduce some concepts that you might be unaware of.

These concepts include a model for hiring team players, how to use DISC personality profiles to improve communication with your team, and how to use the Cynefin framework to empower your team to make their own decisions.

<click: cross out “don’t>

I’m not going to dive super deep into these topics. I don’t have time to fully cover them in enough detail where you could leave this session able to implement them. Instead, I’m just going to introduce them and do enough to move them out of your “things you don’t know you don’t know” bucket into your “things you know you don’t know bucket”. That way, if they’re on your radar, you’ll be in a position to recognize when you’re in a situation where deeper knowledge might be useful and will have the language to seek out that knowledge.

**<click: back to agenda>**

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: identify>**

The first step is to identify your core values.

I realize that this isn’t super profound, as far as advice goes. I mean, it’s kind of obvious. But I think it’s worth starting with the basics because so many teams *think* they’ve done this, but haven’t.

Quick question: how many of you have seen a memo or a powerpoint on “core values” at some point at your job? How many of you are re-exposed to those values on at least a quarterly basis? Anyone have a team habit of actually *referencing those values* during team discussions or decision making?

<click: show examples (TODO)>

At Heuristics, we have 4 corporate values that we focus on. They are:

1. Pioneering (*innovate / seek out new solutions*)
2. Act Intentionally (*have a reason for everything you do*)
3. Show That You Care (*treat people as people*)
4. Achieve Excellence With Others (*collaboration FTW*)

I don’t want to focus on the values themselves, because that’s not the point I’m trying to make. The point is that we have these things, and they aren’t something that some wackadoodle CEO dreamt up on an African vision quest and then turned into motivational posters. These values came from the people already doing the work, and everyone on the team knows them.

**<click: ?>**

So what are *your* values?

If you can’t point to a random person on your team and ask them to talk in a meaningful way about these things, then you need to start there because it’s really hard to hire the “right person” if you don’t even know what traits the “right person” will have.

Guiding you through the process of identifying core values is out of scope for this talk, but there are a billion different websites out there with exercises you can do to surface them.

Let’s pretend that you and your team purchased a ton of post-it notes, went through one of those values identification rituals, sang Kumbaya together, and you now have your list of Core Values. What 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.

Team players are people smart enough to understand how to collaborate and work with other people in healthy ways.

It’s important that you get all 3 characteristics because they balance each other out. Let’s look at what happens when we hire someone that is lacking one or more of those characteristics.

<click: The Pawn>

Lencioni considers humility the most important of the three traits when it comes to teamwork, but taken on its own it may not be that desirable.

Candidates that are humble but are lacking a drive to succeed and emotional smarts can be easily taken advantage of and are unlikely to push the envelope.

<click: The Bulldozer>

Hungry candidates are the people that will push and push until the job is done. These can be your innovators and your closers and can motivate others to do better as well.

But that sort of drive, absent humility and people-smarts, creates a bulldozer that doesn’t work well with others and is more focused on their personal success than that of the team.

<click: The Charmer>

Candidates with lots of people-smarts tend to interview really well. These people are likeable and charming, but you need to make sure you’re hiring folks with humility and hunger as well. Otherwise, you’re going to end up with some very likeable people that don’t actually get much done on their own and don’t help out other people either.

What if we hire someone that has two of the characteristics, but not all three?

<click: Accidental Messmaker>

Candidates who are humble and hungry are generally good-hearted people who have a drive to succeed, but without emotional intelligence they tend to make mistakes in group settings. These are the people that might miss subtle social cues and offend other people on the team. It’s harder for these people to create strong interpersonal relationships, and that can make it hard for them to “gel” on your team.

<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. When faced with a choice, these people will always make the decision that benefits them personally, regardless of what it does to the team.

This is dangerous not only because they threaten your team’s ability to meet its goals, but also because these folks tend to drive away your other employees. The longer you have a “lone wolf” on your team, the harder it will be for the team to maintain its culture of teamwork, and the more likely that your valued team players will start to leave.

<click: all three>

You should avoid hiring people with just *one* of these traits.

In some situations, you might be able to hire someone with *two* of these traits and then work with them to develop the missing one.

But if you really want to build an exceptional team around the values of teamwork, then test for all three traits.

**<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.

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

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.

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 around. People that were rude to the taxi driver 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, prospective hires play a few games of ping pong with a designated 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*. I might give the team some direction on things to focus on, but generally I try not to bias them one way or the other. The panel format is great for getting multiple reads on a person, and then I debrief the panel participants as a group. (TODO: Story about Sara)

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 this idea of “scaring them with sincerity”, where you make a big deal about how seriously you take something, and that if they aren’t enthused by that prospect, they might not be a great fit. For instance, if one of your core values is community engagement, then you might make a big deal about how you’d expect them to show up to user groups or speak at conferences or whatever, and really press them to demonstrate enthusiasm while reiterating how important this is. This gives the candidate an out, and it’s awesome if they take it. If you do such a great job of articulating your values that candidates are able to realize and accept that they aren’t a good fit, and they subsequently self-select out of the process, then it saves you a ton of wasted time on interviews, not to mention the money you’d waste by hiring someone that doesn’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?

You might be anxious to get them engaged, but it’s a mistake to just point them towards whatever problems they were hired to solve and step back. Instead, 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 what you want from them, then they’re going to waste a lot of time trying to figure it out. And if you don’t understand what they need, then you’re going to do a terrible job of removing blockers and making them productive. 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.

<click: second two>

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.

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’ve found really helpful:

1. Interaction Style – do you prefer face-to-face conversations or virtual? Frequent checkins, or more limited?
2. (click) View on deadlines – do you like to finish super early? Right on time? Do you sometimes exceed a deadline in order to improve the deliverable?
3. (click) Personality assessments (DiSC, Myers-Briggs, etc) – Do you know your assessment?
4. (click) How do you measure success?
5. (click) What’s in it for me? What would you like to get out of this work experience?
6. (click) How do you want to be managed?
7. (click) How can I tell if you’re stressed?
8. (click) How can I tell if you’re 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.

TODO: some sort of story?

**<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 by the Microsoft Workplace Analytics team found that employees *without* a regular 1:1 are 4x more likely to be *disengaged* than their peers.

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.

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, Dale Carnegie’s 2016 Leadership Study indicated that 41% of the global workforce would likely change jobs in the coming year, with “bad management” being 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.

There’s nothing wrong with occasionally discussing an ongoing project in the context of those larger ideas, but if you spend your 1:1s talking about short-term tactical things, you’ll never make any progress on long-term strategic things. And it’s progress on the long-term strategic things that make people feel like their career is moving in the right direction.

**<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.

I’ve personally tried 15, 20, 30, and 45-minute meetings, and I’ve found 30 to be best.

15 minutes doesn’t give you enough time for *both* people to have an agenda or discuss anything meaningful, so they quickly become rote status report meetings with no real long-term benefit.

20 minutes doesn’t give you any buffer time, which leads to a very rushed feeling. Plus, it encourages you to squeeze 3 1:1s into an hour, and then the person in the middle gets a raw deal because you don’t have time to decompress from the prior meeting, *nor* do you have time to reflect or take notes before rushing off to the last one.

45 minutes once a week usually feels unnecessary, unless there are specific issues that you’re working on together and that demand more time.

A 30 minute meeting gives you enough time to have a meaningful conversation without feeling rushed and every time I’ve tried something else, I always come back to this length.

<click: their agenda>

This part, about explicitly carving out time for *their agenda*, is really important for a couple of reasons.

First, your 1:1s are an ideal way to identify the things that are chafing, *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”. They can just tell you what’s on their mind.

<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.

If you don’t provide that training and development then your people are going to leave, and another study shows that when they do leave, training and growth opportunities are among the top things they look for in their next job.

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.

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.

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 often have priceless insights that can save you time and money, or improve things that you’d never realize on your own. These are the people that are in the trenches doing the work, so take the opportunity to tap into that perspective during your 1:1.

I like asking for specific ideas on how to improve some aspect of the work, 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.

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.

Feedback is tough to do well. I personally find it very easy to give good, specific feedback when someone does well at something, but I struggle with giving someone negative feedback. Anyone else feel the same way?

**<click: feedback graph>**

Even though it’s uncomfortable though, this is something that we *really* need to lean into. 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.

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.

For instance, before giving the feedback, ask questions like:

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

Notice that all of those questions start with “what” or “how”. That’s important: “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 moved their projects forward faster and more smoothly.

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!*

If someone tells you they hate being micromanaged, then you may want to check in a little less frequently to give them more space to work. If someone tells you they like lots of support, then more frequent check ins might be appreciated.

I make it a habit to re-read my Design the Alliance notes at least once a quarter to make sure that I’m operating according to the arrangement I made with each person on my team.

**<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. Those 1:1s will help you *identify* problems to solve and opportunities to exploit, but being aware of those things is only half of the battle. You still need the team to do the real work to *solve* the problem or exploit the opportunity. And to do that, you need to be able to explain the issue, tell them what needs done, motivate them to take action, and provide ongoing communication as the task progresses.

<**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. Instead of being motivating, many of my team found the email *de*-motivating. I found through the grapevine that more than one person felt like it was micromanaging and overly corporate. Apparently, all of that bold and underlined text and those intricately articulated details had the opposite effect than I’d intended!

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. At best, that latter group would feel deflated, demotivated, and micromanaged, but would change their behavior. At worst, that latter group would feel deflated, demotivated, and micromanaged, and also would not change their behavior.

It became clear to me that I couldn’t continue to communicate with my team as if I was leading a bunch of people that thought, acted, and worked like I did. If I didn’t want to alienate my team, I needed to adjust my communication patterns to be more compatible with how *they* thought, acted, and worked.

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 they differ in some significant ways. 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, I’m normally pretty introverted, but my role requires that I interact with people so I’ve had to learn to act more extroverted at work.

On the other hand, I have a lot of role-based authority at work, so I can generally pick and choose the sort of things I want to delegate to my team, and when I have a strong feeling about something I can always “pull rank” and get my way. That’s not a tactic that I use often, but it’s definitely a tool in the toolbelt. But at home, in my marriage, I don’t have any such authority; my wife and I function as equals, and “pulling rank” generally backfires.

The DiSC model is also easier to apply in a workplace setting because the assessment is shorter and more contextual than the Myers Briggs assessment.

**<click: show DiSC squares>**

The DiSC model focuses on 4 dominant profiles that indicate how people tend to behave in a particular setting. These dominant profiles start with each of the 4 letters in “DiSC”, making this easier to remember than the Myers Briggs types.

**<click: D>**

The D stands for Dominance. People with this profile place emphasis on accomplishing results, the bottom line, and confidence. They tend to see the big picture, can be blunt, and accept challenges. 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, openness, and relationships. They are often enthusiastic and optimistic and like to collaborate.

My friend Jared is a strong I. He’s very much a people person, and if you assign him a project the first thing he’sgoing to do is make a list of all the people that he knows with the necessary skills and how he could get them involved. These people tend to be good managers, because they’re good at leveraging their influence to achieve results through other people.

**<click: S>**

The S stands for Steadiness. People with this profile place emphasis on cooperation, sincerity, dependability. They don’t like to be rushed, have a calm demeanor, and often take supportive actions. These people work great in collaborative settings.

**<click: C>**

Lastly, the C stands for Conscientiousness. People with a C profile typically enjoy independence, possess objective reasoning skills, are detail oriented, and fear being wrong. These are great project managers and technical analysts.

**<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.

Someone that strongly exhibits the qualities of a D type, for instance, with no strong secondary type, is called a “High D”. However, D and I types have a lot in common; both are bold, fast-paced, assertive personalities so there often is overlap. Someone who is primarily a D, but has strong I tendencies as well, would be a “DI” on this graph. Similarly, someone who is primarily an I, but has strong D tendencies, would be an ID.

C and D types are both task-focused, logical, skeptical and challenging, so it’s common to see some overlap here as well. Someone who has just C characteristics would be a “High C”, while others might be a C with secondary D or S traits. Those would be called CD or CS types.

**<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. No style is “better” than another; each personality type is capable of being successful, and each personality type is capable of learning to behave in different ways. DiSC is about identifying someone’s natural tendencies. I’m not naturally outgoing, but I’m capable of *behaving* in an outgoing way when I’m in a situation where I recognize that being outgoing would be desirable or appropriate for me.

<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.

So 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: management preferences>**

To make this more relevant to this talk, we can use this assessment as a lens to look at my management preferences rather than my general personality.

The report that I received points out that I’m often motivated by the aspects of management that involve setting standards and improving upon ideas, but that my energy is sapped by managing people that don’t meet my standards or that are overly emotional or irrational. I also struggle to give feedback in a way that doesn’t feel critical to the person receiving it and display empathy.

These bottom two traits are especially problematic for managers, because like I showed you earlier, my relationship with my team is one of the biggest drivers of whether or not they are actively engaged in their role, and engagement in their role is one of the biggest drivers of productivity and retention.

In other words, my natural inclination is to struggle with some aspects of leadership that directly affect the bottom line.

But that’s kind of the point of all of this; DiSC is about *behavior*, and behavior can be changed. Using this knowledge of my personality type, I’m able to practice giving more positive feedback or displaying more empathy. I have literally practiced giving feedback to people to make it feel more natural and less critical, all because I’ve become aware of these tendencies.

**<click: directing and delegating>**

Knowing my DiSC type helps me direct my team and delegate tasks more effectively as well.

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

* Displaying Drive
* Offering Challenge
* Ensuring Objectivity

This reflects that I’m very goal-oriented and encourage my team members to focus on accomplishment. It also reflects that I have a very critical and analytical approach and encourage my team to be equally focused on processes that make logical sense. And lastly, it reflects that I typically provide a solid basis of reason and evidence for my decisions. I have high standards backed up by deliberate intentions and I’m interested in ensuring outcomes that are fair and accurate.

But you can see that I don’t naturally spend much energy on things such as Encouragement, Collaboration, or Support. This has come up in my own feedback as a manager, and again it’s one of those things that I have to actively work to do.

**<click: delegating to D>**

The real value of the DiSC model comes when you apply it to your interactions with other people whose types you know.

For instance, I’m a type CD, so when I’m working with someone that I know is a strong D, then I can recognize that they are going to be more goal-oriented than task-focused. They might struggle to put together a detailed work-breakdown-structure that I would find acceptable, but they might succeed if I give them a broad overview and give them some clearly defined limits of autonomy that they can work within.

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

If I’m working with an I personality, then I can recognize that they may need help prioritizing their work, but that I need to be careful not to micromanage them. In this case, I might choose to check in and offer lower-level feedback than with a D person, while still giving them some space to explore some of their more adventurous ideas.

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

People with the S style are accommodating and flexible, so they seem easy to direct. But they may be heistant to speak up and assert themselves, so I need to be careful that my strong and objective personality doesn’t intimidate them.

The best way for me personally to delegate to this personality is to give clear step by step directions, to seek and incorporate their input, encourage them to take initiative, and to check in frequently.

The check-in fre quency is really interesting to me; there are some people on my team that *want* me to check in daily and get nervous when they’re not getting that constant feedback, and there are other people on my team that *hate it* if I drop in that frequently for updates. There is no one-size-fits-all approach, and knowing the personalities of each person is really important.

**<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.

For these people, I like 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. C types are very quality-centric, so when they have concerns about quality it’s important to listen so they don’t feel ignored. And lastly, 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.

**<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 TODO>**

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 the entire team needs to take a DiSC assessment.

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.

However, the more people that you can get to do it, the more information you’ll have. It probably doesn’t make sense to put the time and money into assessing a bunch of early-career people that won’t stick around for very long, but maybe it makes sense for your more senior people, or the people that are starting to ask for increased responsibilities.

When people start asking for you to delegate more to them, that’s a good sign that you’re in a spot where knowing your respective types could help make that delegation process more effective.

**<click: back to agenda, #5 highlighted>**

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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