

3D BUSINESS

The 3D Journey **Team Captain Guide**

In association with

THE
JOSEPHCOMPANY

Version 1.1, August 2022

3D BUSINESS

Team Captains,

Thank you for your willingness to spearhead this 3D Journey initiative in your organization and community. We believe in the model that we're prescribing because we've seen it work tens of thousands of times. But it doesn't work without someone leading the way in the form of a Team Captain. Thank you for being that person.

In sports, a Team Captain is usually someone that has the respect of their Team. While he or she may or may not be a major contributor on the field, Captains are selected for their qualities and abilities *off* the field. In this case, your willingness to serve is your greatest asset.

[3D Institute](#), in association with [The Joseph Company](#), is providing this program to every member of greater St. Joseph through the generosity of multiple businesses and individuals and grant funding. Please don't associate "free" with "of no value". Others have seen the value and made an investment in you and your Team's behalf.

And in full disclosure, this is the first time we have rolled out this program to the business community in this way. We are sure there will be hiccups and bumps in the road, but we are equally sure there will be breakthroughs and moments of clarity for your business, Team Members, and yourself.

This guide is intended to give you some backdrop and instructions to ease the transition and make your Team Meetings a success. I am also available by phone or email to guide you through any questions or problems you may encounter. We are committed to seeing you through the Journey, and confident that it will take you where you want or need to go.

Alan Hoffer
Director, 3D Business
Fall, 2022

Responsibilities of a Team Captain

The first and greatest responsibility of the Team Captain is to participate in the Journey yourself. We say it this way in 3D: **You can't be a tour guide to a place you've never been.** While the time commitment is not a heavy ask, it does take time, and more importantly, thought., Start early. Take the time to write down your answers in the Journal.

The second responsibility is to set up the monthly Team Meeting and communicate with the Team. If your Team is entirely inside an organization, we recommend that you pick a time and place that's convenient. Lunch in a conference room, for instance. If your Team is from different organizations, a coffee shop before work or a community center after work might be better. The hardest part of the program will likely be finding a time that everyone can participate. Don't make it harder than it needs to be. If you can't fit everyone in, see if you can find another group or agree to meet with the individual at another time. But don't undersell the importance of the Team Meeting. We do not view it as optional for the experience.

We will help you with your communication. Brief, clear, and regular is what we're striving for. We want expectations to be crystal clear, so there isn't any, "*I didn't know*" or "*I didn't understand.*" We are sure that some will not do their work or choose to opt out. If that happens, let's make that because of their choice, not our insufficient communication and ambiguity.

If your company or organization has a budget, a small enticement (donuts? Pizza? Fruit?) is a nice touch. But don't feel obligated in any way to invest your own resources into the Team Meeting.

Facilitating the Team Meeting

First and foremost, you are a facilitator, not a teacher. Your job is to get the conversation rolling, keep it on topic, and monitor time. Depending on the makeup of your Team, this may not be an easy task!

We suggest you set up some ground rules at the start of every Team Meeting. You might add your own. Here are some suggestions:

- **Be fully present** – put your phones away. Listen to everyone else as they share.
- **Let everyone participate.** We don't have time for everyone to answer every question.
- **Keep your answers brief.** We want to finish on time.
- **Honor each other.** There are sure to be differences of opinion. We want this to be a place where all views and opinions are welcome. Since there are no decisions being made, there shouldn't be a need to argue. We encourage the use of the phrase, "What I've seen" or "in my experience..." over "we have to" or "we ought to".
- **Risk being open.** While we do not require anyone to share beyond their comfort zone, we encourage you to share your real heart and thoughts and get beyond just surface answers. We all benefit from this openness.
- **Be on time with work complete.** You get out of it what you put into it, and your timeliness shows respect for everyone else on the Team.

- **What happens in the Team Meeting stays in the Team Meeting.** As you will learn in the first month, the assurance of freedom to speak without it coming back to haunt them is a key element in building a Team. No one should expect their thoughts and opinions to be broadcast outside the Team environment. This is especially important for a person's experiences and opinions.
- Make yourself available for further discussion, or offer time with someone from 3D by phone or email or Zoom.

Ideally, everyone will participate (speak) during the Team Meeting. While you don't have to keep track of who answers what, if you notice someone who hasn't spoken, it's perfectly ok to say, "___, we haven't heard from you yet, what did you get from ___?"

When people begin sharing, time goes by REALLY fast. Before the meeting, we will provide some suggestions on timing and what questions to focus on (you won't likely get through them all). The timing is not binding, but HONOR YOUR COMMITMENT TO TIME. If people ask to meet longer, that's perfectly fine, but don't assume and say things like, *"Well, I'm going to ask you to stay just a little over today."* FINISH ON TIME. There are really only two reasons you would run over: poor monitoring or poor facilitation skills. This is your responsibility as Team Captain.

The Team Captain is part of the Team. We want you to answer and participate just like everyone else. But we suggest you go last for each question or discussion. This has two functions. First, it shows that you value what others say. And second, it allows you to wrap up and control time better. You are of course welcome to interject at any time as part of the discussion, but a facilitator who speaks first every time – *especially* if they are also the leader by title – tends to quell good discussion, not promote it.

We also recommend you take notes. This shows that you care about what is said and also allows you to follow up with Team Members where appropriate. You might remind them that the notes are for you, and won't be shared without their permission.

You are a FACILITATOR. While we hope you have insights and stories to share, your job is not to cover the material or explain it. We call this a Journey for a reason. It's the participant's path – their participation is what leads to the insights. While the 3D framework gives the structure, the real value is in the thought and discussion that ensues. Please do spend the Team Meeting going over the facts, but focus more on the insights and applications, as driven by your Team.

To that end, we recommend asking good, open-ended and precise questions. Try to avoid closed questions that can be answered with a Yes or a No. Opening a question with *"What..."* (or *"How..."*) is almost assuredly a better question than opening with *"Did..."*, *"Are..."*, or *"Was..."*

- Not great questions
 - Did you find this section interesting?
 - Are you going to apply anything from this?
 - Do you have any questions?
 - Does anyone have a story to share?
- Better questions
 - What did you find interesting?

- What can you apply to your work today?
 - What questions do you have?
 - What stories from your experience show the value of this principle?
 - How could you apply this to your work right now?
- Breaking in
 - At times, a participant may get long-winded or tell a story that doesn't apply to the question at hand. Gently interrupt and get them back on track with another pointed question. It is the Team Captain's job to keep the discussion on point.
- Lastly, try not to let the Team get hung up on terminology or specifics. We have tried very hard to find language that could apply to all organizations. But we may use terms that might not apply to your Team. If we call people "workers" and that's a term that doesn't really fit your culture or organization, then roll with it. workers = team members = individual contributors = constituents = patrons = neighbors = parishioners. If you find something that is borderline offensive or incorrect, please let us know.

Reporting back to 3D

We welcome feedback and reports from the field. In particular, please let us know about the following:

- Errors or corrections
 - Even if it's a small typo or grammar error (and we KNOW they exist), let us know how we can make our materials more professional.
- Changes in roster/status
 - If someone adds late or drops out, please let us know so we can change their system status and communicate with them appropriately
- Notable events or participants
 - If someone has an awesome insight or story in applying the 3D Framework or is having difficulty with some of the topics, please let us know. Depending on the nature, you might need their permission first to keep the integrity of the Team environment intact. Do not violate their privacy just to let us know what is happening.
- A special case
 - We are always looking to highlight success stories. We can't know what they are unless you tell us. If you think your application of the material or back story would make a good Spotlight video, please let us know..
- Good ideas or references
 - If you have an idea for a book, video, or possible exercise or example, please share them with us. Changing or adding to the web-based resources is trivial and can help everyone in the program. Changing the videos is a little more difficult.

Frequently Asked Questions

- What if someone misses a meeting?
 - It's going to happen, and it's OK. They can still consume the materials through the online video platform and have their Journal to do their work. They'll miss the discussion, of course, which is valuable, but it's

fine. We'd like the Team Captains to catch them up and perhaps give a run-down of interesting topics that came up and ask a few questions, but don't make a big deal of it.

- Is this the same program the schools and athletic coaches are going through?
 - The base concepts are exactly the same. We've rewritten the 3D Business version to use more appropriate examples and added some additional research and factors that are of interest to businesses and organizations. The timing of the education and sports versions are also slightly different, but if you talk to someone going through those programs, the terminology and concepts should be the same. We encourage discussion around the community about 3D!
- How much time will it take?
 - The video material takes between 30 minutes and an hour (per month), The personal reflection is likely less than an hour as well. But always emphasize that the outcomes are directly correlated to the inputs.
- Can someone join the group late?
 - Yes! While they will obviously miss the Team Meetings that have already occurred and be slightly out of sync until they catch up, there is no reason an individual or even an entire group could not start the Journey at a later time. We expect to be adding groups and organizations throughout the year. If you add someone to your Team, take the responsibility to catch them up and inform the Team of what is going on.

Discussion Guide, Section 1 – September 2022

A Team and a Coach

Key Point (don't miss this!)

A well-functioning team can accomplish more than individuals ever could.

Suggesting Timings and script (assume one-hour meeting)

You are not bound to any specific question or timing. You can choose your own questions from the Journal or those you created in your own Journey.

0:00 Ground Rules and Expectations

This should be very brief, and very precise. Cover:

- Safety, confidentiality – what happens here stays here.
- Timeliness – start and end on time.
- Keep responses short – We can always connect deeper later.
- Let everyone participate.
- Law of returns (what you get is proportional to what you invest)

5:00 Material Mastery

Cover definitions, facts (and, optionally, follow-up questions)

Note: this is not designed to take much time in the Team Meeting. You simply do not have time to focus on the rote concepts. Instead, focus on the application of them or include them in the discussion questions below. Some suggestions are inline.

- Team
 - What is the common goal of our Team?
- Coach
 - Which of us are Coaches here? How do you feel about that title?
- The Five Factors of an effective Team
- The Four Questions
- The Three Regrets

10:00 Reflection

These questions are designed for personal introspection. There are no right or wrong answers in this section. Understand that in many cases (especially the questions which factors are present on the Team and which need improvement) the Team Member is taking a personal risk to answer. Be honoring in your response. Thank them for answering.

The last question about regrets is particularly personal. It might generate some open empathy and may be worth your time to follow up.

Any of these questions might generate discussion that lasts the whole time. Since they are designed to be more personal, try to lead the discussion in a way that promotes insights and answers.

It is unlikely you'll get to all of these. Before you begin you might pick one or two you think are most important to your Team.

25:00 Discussion: Applying to us

This is where we would like the majority of the discussion time to take place. Again, there really aren't right or wrong answers, but as you get to applying the truths to the organization, there is the possibility of heated discussion and strong opinions.

Specific comments by question (four questions, ~25 minutes)

What dimension are you most adept at? Least?

How did 2nd and 3rd dimension coaching impact you?

What trajectory-changing moments have you had?

50:00 Action

Ultimately, we want Team Members to DO something differently. The discussion should be less about *what* was done and more about the reaction/learning as a result. Depending on the prior discussion, this may need to be cut short. It's another area where following up with Team Members is a good idea.

Thoughts on specific tasks

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56:00 Personal reactions

This would be a place where everyone's (short) response would be profitable. You're just looking for a quick pulse on where they are with regard to the Journey. You're not trying to correct or coerce them, but you do want to know if there are issues beginning to develop. You might ask about time, application, questions.

The Action section doesn't really require any discussion in the Team Meeting, but it would be good to get a pulse on what the responses were as your Team Members attempted them.

Please direct Team Members to the additional study resources available in the Wrap Up unit online. You are not required to consume them all yourself, but at least be familiar with them.

60:00 END ON TIME

Follow-up: After the Team Meeting

Depending on when you schedule the Team Meeting, you should have between one and two weeks before the next section drops online. This is a great time to follow-up with each participant individually. Your notes will be important here. Highlight items worthy of follow-up questions. You are not to counsel or advise. Let your motivation be to find out where they are and where they want or need to go.

You should also make sure you have a rhythm for following up with the Team as a whole. If you normally meet in person, a simple thank you is enough. If you are virtual or in different locations, an email could suffice.

- Thank them for their participation
- Summarize some key points you heard them make
- Don't single anyone out, positively or negatively.
- Honor the confidentiality of the group
- Remind them the Journey is a nine-month process and it's worth the investment.

Discussion Guide, Section 2 – October 2022

3D Coaching

Key Point (don't miss this!)

- To NEGLECT any aspect of our being is to NOT be the best we can be. This is true of ourselves and those whom we coach.
- Understanding is the basis for care.

Suggesting Timings and script (assume one-hour meeting)

The biggest issue with leading this month's discussion is likely to be time. There is a lot more specific information covered in Section 2, and now that you've established relationships with your Team, they'll be a lot more talkative. You are not bound to any specific question or timing. You can choose your own questions from the Journal or those you created in your own Journey.

0:00 Ground Rules and Expectations

You might cover this in an email to any new participants. But there isn't much value in repeating this for every meeting unless things are getting out of hand.

- Safety, confidentiality – what happens here stays here.
- Timeliness – start and end on time.
- Keep responses short – We can always connect deeper later.
- Let everyone participate.
- Law of returns (what you get is proportional to what you invest)

0:00 Material Mastery

Cover definitions, facts (and, optionally, follow-up questions)

Note: this is not designed to take much time in the Team Meeting. You simply do not have time to focus on the rote concepts. Instead, focus on the application of them or include them in the discussion questions below. Some suggestions are inline.

Define the 1st, 2nd, and 3rd Dimensions, Chronos and Kairos time, care and understanding.

5:00 Reflection

It is unlikely you'll get to all of these. Before you begin you might pick one or two you think are most important to your Team. Some comments to help you guide the discussion are below each question.

- What would you say is the “foundation of purpose” for where you are at in this phase of your life? How can you keep yourself reminded of it?
 - What if you don't have one? What happens then?
- How can the 3D Framework help you clarify and/or fulfill your intended purpose more effectively?
 - How do the three dimensions help you diagnose a problem, both in yourself and in your Team?
- What was a significant Kairos moment you've experienced in life? How did that experience change your trajectory moving forward?
 - Do we typically recognize Kairos moments in the moment? What makes a moment Kairos?
- How can you bring more creativity and meaning to the work you're engaged in?
 - Why haven't you done this before? What holds back our creativity? (Hint: review the five factors of an effective Team)
- How would your team members answer this question: How does it feel to be coached by you as their leader?
 - How would you confirm this view?

20:00 Discussion: Applying to us

This is where we would like the majority of the discussion time to take place. Again, there really aren't right or wrong answers, but as you get to apply the truths to the organization, there is the possibility of heated discussion and strong opinions.

45:00 Action

You might open with a review of action items from the last section.

Knowledge without action does not yield results. Ask what actions have they undertake, and what results they expect (or have already seen).

If there are no actions already attempted, ask which ones resonate. Dig a little bit if there is reluctance to try anything.

56:00 Personal reactions

Please direct Team Members to the additional study resources available in the Wrap Up unit online. You are not required to consume them all yourself, but at least be familiar with them.

60:00 END ON TIME

Follow-up: After the Team Meeting

Depending on when you schedule the Team Meeting, you should have between one and two weeks before the next section drops online. This is a great time to follow-up with each participant individually. Your notes will be important here. Highlight items worthy of follow-up questions. You are not to counsel or advise. Let your motivation be to find out where they are and where they want or need to go.

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Discussion Guide, Section 3 – November 2022

3D Coaching – The First Dimension

Key Points (don't miss this!)

When we keep first things first, second things aren't diminished, they're enhanced. But when second things become first things, we usually lose them both.

You can't fix 2nd and 3rd Dimension issues with 1st Dimension strategies.

Suggesting Timings and script (assume one-hour meeting)

This section begins our dive into the dimensions of the 3D Framework. The First Dimension is purposefully NOT prescriptive – we do not wish to be in the business of telling people how to run their businesses, but we are setting the groundwork for the larger purpose of WHY we run the business.

Much as we discussed Success in the Life Cycle of a Dream in The Joseph Company breakfasts last year, we want to stress the importance of doing well in the first dimension. Run the business with excellence.

As the discussion gets specific, you might ask what resources and lessons your Team Members have learned about excellence in the first dimension. It might be worth keeping a log or reference to share with others.

0:00 Ground Rules and Expectations

You might cover this in an email to any new participants. But there isn't much value in repeating this for every meeting unless things are getting out of hand.

- Safety, confidentiality – what happens here stays here.
- Timeliness – start and end on time.
- Keep responses short – We can always connect deeper later.
- Let everyone participate.
- Law of returns (what you get is proportional to what you invest)

0:00 Material Mastery

Cover definitions, facts (and, optionally, follow-up questions)

Note: this is not designed to take much time in the Team Meeting. You simply do not have time to focus on the rote

concepts. Instead, focus on the application of them or include them in the reflection and discussion questions below. Some suggestions are inline.

Define the elements of the First Dimension. What additional skills would you include? How might those skills change in a different environment? (think of past jobs)

What skill(s) are critical for clarity and structure (needed for an effective Team per Google's project Aristotle).

10:00 Reflection

It is unlikely you'll get to all of the questions in this sections. Before you begin you might pick one or two you think are most important to your Team. Here are some additional questions to deepen your discussion.

- Even as we focus on the skills and strategy to make our organization successful, keeping first things first is critical. How can a lack of focus on "first things" undermine our ability to be successful?
- How do we manage the tension between focusing on our hedgehog and being creative and trying new things?
- Which of the first dimension skills would be most beneficial for you right now? For others on your team?
- How have you attempted to measure communication (clarity) on your Team?
- What are some ways you have seen good strategies implemented in the wrong dimension?

25:00 Discussion: Applying to us

This is where we would like the majority of the discussion time to take place. There really aren't right or wrong answers, but as you get to apply the truths to the organization, there is the possibility of heated discussion and strong opinions.

- Get participants to discuss their skills and expertise. This could be surprisingly hard for some people.
- Try to avoid letting the discussion about improvement delve into a gripe session. Focus on what those skills would allow the organization to accomplish.
- When you talk about confidence (Q3), you might point out that this is an overlap into the second dimension and note that the dimensions interrelate.

- There is a risk in asking how well people know their role. Also note that this self-assessment is fraught with potential error. You might ask how we can confirm our biases and our misconceptions (you could easily do this by focusing on leaders, and not accusing anyone of a poor personal evaluation).
- Mission statements are frequently well formulated, but not by the people that need to know them the most. How does inheriting or quoting a mission/vision statement differ from helping to create one?
- If you can apply the 3D Decision-Making Cycle to a specific issue, that would be great, especially if the issue is in the past. Think hard of an example where a great effort in the wrong dimension failed at getting the desired results. The 3D process is a great diagnostic framework, and want to train our Team to think in this diagnostic mindset.

45:00 Action

You might open with a review of action items from the last section(s).

Knowledge without action does not yield results. Ask what actions have they undertaken, and what results they expect (or have already seen).

When actions don't equal expectations, we can train ourselves to ask why, instead of making assumptions about incompetence.

Brainstorm ways to keep first things first and mission/values at the forefront (first things first).

Create a list or map of what skills (outcomes) are lacking and how they could best be obtained.

We will find later that a sense of autonomy is critical in motivating Teammates. How can we (as leaders) release our Teammates to find solutions? What would this require (of us, of our Teammates, of skill development?)

As a leader, review the definition of Coach in light of the first dimension. What do you need to do get the best out of your Team in the first dimension?

How can you achieve more excellence? How will this help your Team get to where they want or need to be?

If there are no actions already attempted, ask which ones resonate. Dig a little bit if there is reluctance to try anything.

56:00 Personal reactions

Please direct Team Members to the additional study resources available in the Wrap Up unit online. You are not required to consume them all yourself, but at least be familiar with them.

60:00 END ON TIME

Follow-up: After the Team Meeting

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