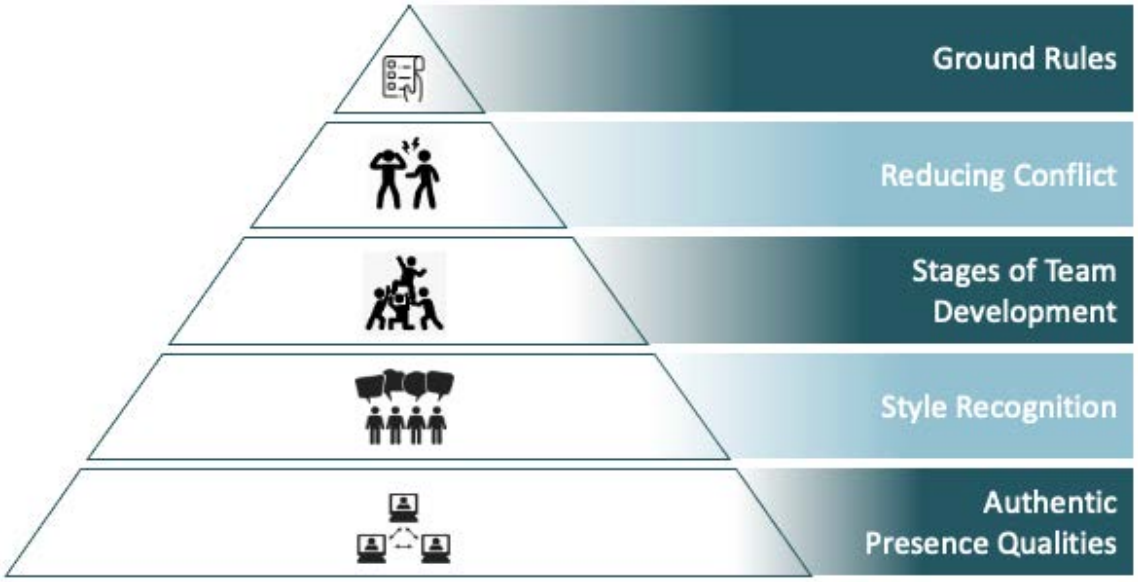
Leadership & Communication:
BUILDING AND LEADING SUCCESSFUL TEAMS



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You are authorized to use the style recognition, stages of team development, ladder of inference and ground rules materials with your team to help your team become or remain high performing. We ask that you do not teach, use, or share these materials with others outside of your team. Thank you!

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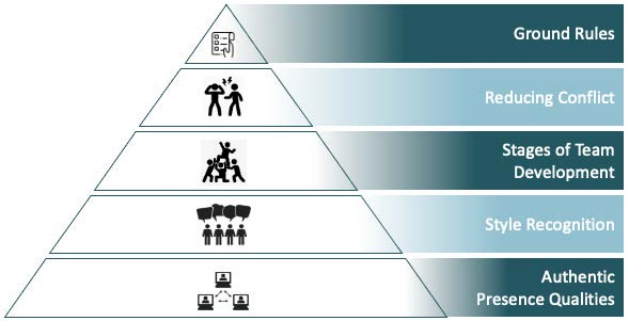
Contents

- Facilitator Bio 3
- Executive Summary / Agenda 4
- Authentic Presence Qualities (APQ's) 6
- Style Awareness 8
- Style Recognition 9
- Stages of Team 13
- Reducing Conflict 16
- What's Next? 21



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DR. SHARON LAMM HARTMAN

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Dr. Lamm-Hartman is an award-winning global executive and presentation coach, leadership development consultant, speaker, writer, and educator. She is the CEO and founder of Inside-Out Learning, Inc., specializing in leadership and personal development. Inside Out Learning is an active member of WBENC and the global Women's President Organization, which only 3% of women-owned businesses meet the requirements for membership.

With over 25 years of global experience, Sharon has worked across the United States and Europe as well as Beijing, Hong Kong, Singapore, and Thailand for clients such as Boeing, American Express, GE's Leadership Development Center, Exxon, E*TRADE, ARCO Chemical Company, Mobil Oil Corporation, Berlex Pharmaceuticals, Fannie Mae, Arizona Society of CPA's, Volvo Corporation, and the National Reconnaissance Office. She has designed and delivered over 3,000 innovative programs, including executive presence and presentation skills programs, and has coached thousands of CEOs, executives, and entrepreneurs worldwide.

She worked internally at ARCO Chemical in International Training and Development and brings a strong client partnership philosophy. For the past 22 plus years, Dr. Lamm-Hartman has been a preferred executive coach for hundreds of Boeing executives with exceptional results, including promotions and developmental job assignments. She has also designed and teaches The Authenticity Code™ Programs, team development programs, and culture-change offsites to thousands of professionals and leaders worldwide, with up to 80% of participants achieving promotion. Sharon has her Top-Secret Security Access and supports executive clients in classified environments. She has also consulted on corporate change efforts, training change agents and developing strategic implementation and communication plans.

Dr. Lamm-Hartman has presented at a Harvard Business Review event on Authentic Executive Presence, contributing to the evolving dialogue on authenticity, leadership credibility, and influence in today's business landscape.

In addition to her private practice and consulting, she is widely published. Dr. Lamm-Hartman has served with the Fresh Start Women's Foundation and Arizona State University's Dean's Board of Excellence Mentoring Program. She is a regular instructor for WBENC's WeTHRIVE program.

Dr. Lamm-Hartman holds a doctorate from Columbia University in Leadership and Organization Development and a Master's in Industrial and Labor Relations from Cornell University. She is a Certified Executive and Presentation Coach and is certified in the Myers Briggs Type Indicator.

Dr. Sharon is a Wall Street Journal, USA Today, and Amazon best-selling author of The Authenticity Code™, which received the Axiom GOLD Medalist award for best 2022 Business Fable. She has been named one of the top 100 Women to KNOW Across America by the KNOW Women Group. Outside of her professional work, she is married to James, has a 20-year-old son, Josh, and enjoys hiking and travel.

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EXECUTIVE SUMMARY

Purpose: To share tools for building and leading successful team & customer relationships

Value Proposition:

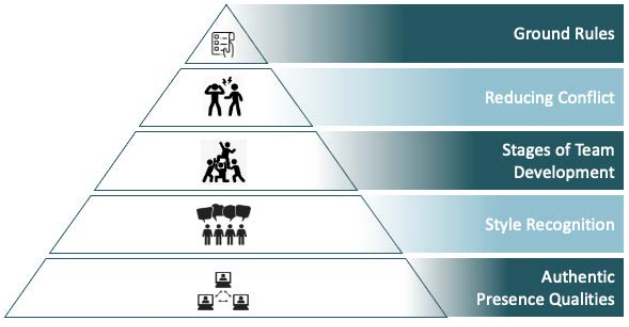
- To help heighten team collaboration and work enjoyment
- To build and lead a high-performing & productive team
- To strengthen customer relationships
- To increase sales revenue

Outcome:

- Use the tools with your team

AGENDA

- Authentic Presence Qualities
- Style Recognition
- Stages of Team Development
- Reducing Conflict
- Ground Rules



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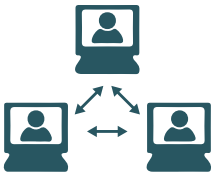
TOOL 1: AUTHENTIC PRESENCE QUALITIES



Instructions: Please fill out this self-assessment by rating your Authentic Presence Qualities (APQs). How well do you demonstrate each APQ? Rate yourself on a scale from 1-5 (1–Needs Improvement; 3–Average; 5–Amazing). Once complete, fill in the blanks below to identify your two lowest and your two highest rated APQ's.

		NEEDS IMPROVEMENT AMAZING
Clarity	The ability to communicate your message in an intuitively clear and compelling way.	1 2 3 4 5
Confidence	The air of assurance, such that others know you have the required strength and resolve.	1 2 3 4 5
Inspiration	Feeling passionately about the vision and mission of the organization. The ability to communicate that passion.	1 2 3 4 5
Passion	The expression of commitment, motivation, and drive that shows people you really believe in what you do.	1 2 3 4 5
Polish/Poise	The look of sophistication, conveying a background of education and experience.	1 2 3 4 5
Respect	The willingness of being accessible to others and of being interested in them.	1 2 3 4 5
Sincerity	The conviction of believing in and meaning what you say.	1 2 3 4 5
Thoughtfulness	The projection of thinking or having thought through something before responding.	1 2 3 4 5
Trustworthiness/ Integrity	Models true positive character qualities and top-level competence of their profession. Your beliefs, words, and actions are aligned and demonstrated through the willingness to constructively share your point of view and follow through on your commitments.	1 2 3 4 5
Warmth/ Openness	The willingness of being accessible to others and of being interested in them. No prejudging; the willingness to consider another's point of view.	1 2 3 4 5

LOWEST RATED APQ'S:

_____ _____

HIGHEST RATED APQ'S:

_____ _____

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EXAMPLES OF HOW YOU CAN DEMONSTRATE AUTHENTIC PRESENCE QUALITIES

CLARITY
- Use communication tools that work for you
- Listen to and watch your virtual meeting recordings

CONFIDENCE
- Practicing for an effective delivery
- Being prepared to address even the most difficult questions

INSPIRATION
- Motivating a stalled team to move forward
- Believing people can achieve the project and helping them believe they can

PASSION
- Enthusiastic tone in communicating
- Getting the project done with a positive attitude

POLISH/POISE
- Greeting clients with a firm handshake and positive eye contact
- Dressing appropriately for the event and audience

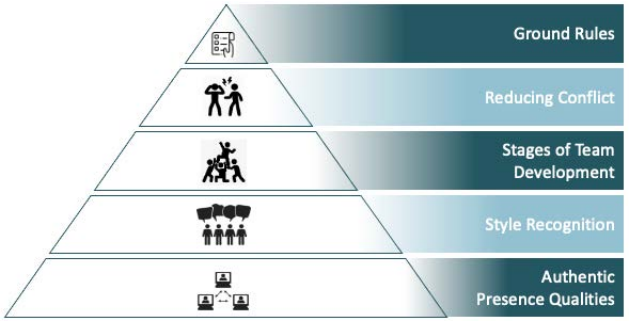
RESPECT
- Good eye contact when speaking into the video camera
- Acknowledging that diverse opinions & experiences have value

SINCERITY
- Walk your talk; live by example
- Not saying something just to be accepted

THOUGHTFULNESS
- Reconsidering a position after hearing a colleague's stance
- When offended, calm down before responding

TRUSTWORTHINESS / INTEGRITY
- Repeatedly performing at a high quality
- Follow through on your commitments or renegotiate
- Living within your values and ethical standards

WARMTH / OPENNESS
- Acknowledging someone for a job well done
- Learning & speaking about what you know is special to someone
- Listening to another's point of view
- Considering all options for the best possible outcome and not just your way



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AUTHENTIC PRESENCE QUALITIES (APQ'S) DEVELOPMENT PLAN

Which two will you work on?

1. [redacted]
2. [redacted]

Why?

What actions will you take to develop your APQs?

APQ [redacted]

-
-
-
-
-
-
-

APQ [redacted]

-
-
-
-
-
-
-

Identify people who can help you work on these qualities and give you feedback over time.

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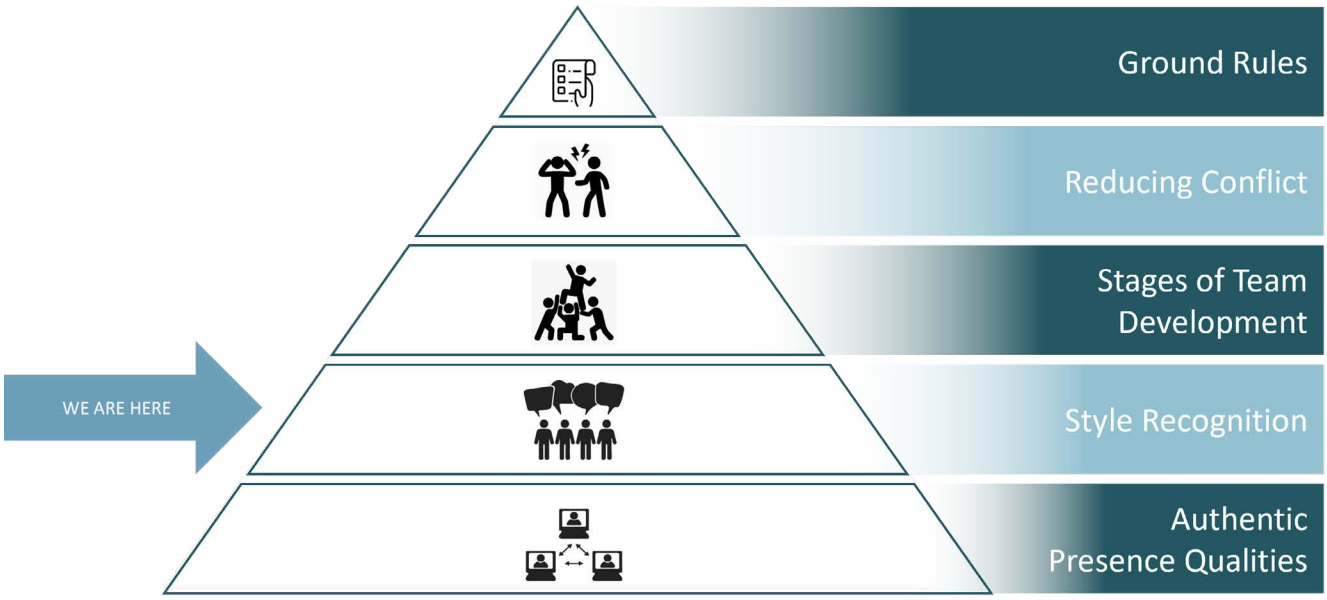
DIVERSITY

“It means understanding that each individual is unique, and recognizing our individual differences. These can be along the dimensions of race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs, political beliefs, or other ideologies.”

https://epibiostat.ucsf.edu/diversity

WBENC ANTI-DISCRIMINATION POLICY

As a community of entrepreneurs, corporate executives, and economic development thought leaders, WBENC is committed to the elimination of discrimination in all areas of business and the provision of equal opportunity when accessing capital, contracts, and contacts. In compliance with state and federal laws and regulation, we do not discriminate on the basis of age, color, disability, gender identity or expression, marital status, national origin, race, religion, sex, sexual orientation, or veteran status in any of our policies, procedures, or practices. This anti-discrimination policy covers admission and access to, and treatment, in all programs and activities.



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TOOL 2: STYLE RECOGNITION

				
	PEOPLE PEOPLE	PARTY PEOPLE	PLANNER PEOPLE	POINT PEOPLE
Pattern	Open/Indirect	Open/Direct	Guarded/Indirect	Guarded/Direct
Pace and Orientation	Slower/People Oriented	Faster/People Oriented	Slower/Task Oriented	Faster/Task Oriented
Their Goal	Steadiness	Influencing Others	Compliance	Dominance
Work Area	Casual, Conforming	Stylish, Interesting	Formal, Functional	Busy, Structured
Wants to	Build and Maintain Relationships	Interact and Be Recognized	Gather Information and Know Process	Get to the Bottom Line and Decide Quickly
Fear	Conflict	Loss of Prestige	Embarrassment	Loss of Control
Aggravated by	Insensitivity	Routine	Surprises	Indecision
Makes decision by	Considering Options	Spontaneity	Deliberate Action	Decisiveness
Decisions are	Careful	Impulsive	Planned	Steadfast
Measures success by	Compatibility, Depth of Relationships	Recognition, Applause, Compliments	Precision, Accuracy, Activity	Results, Track Record, Progress

Which style best represents you?

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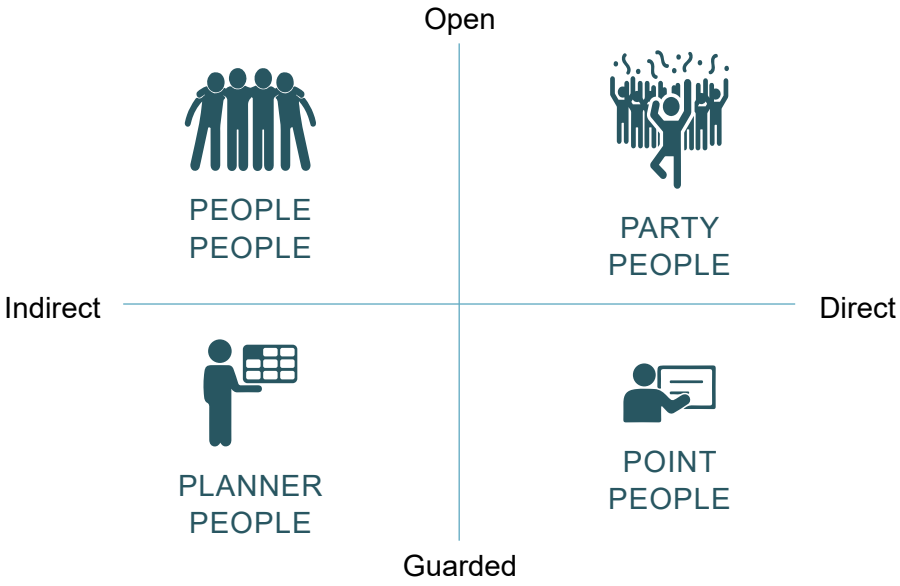
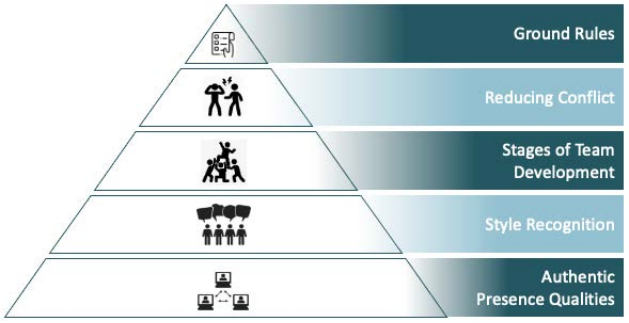


How will you be more flexible in managing yourself when dealing with someone with a different style?



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VERBAL CLUES

Listen carefully in a virtual setting to the words used.

SPEED READ PEOPLE—READING OTHERS' STYLES

Verbal clues: If you meet someone, especially for the first time, and they come on strong, they are likely either a **Party** or **Point Person**.

If they are quiet and soft-spoken, they are probably a **People** or **Planner Person**.

NEXT CLUES: *WHAT* THEY SAY.

	STYLE	TYPICAL STATEMENTS	NOTES
	Point Person	"Tell him I want to talk to him ASAP!" "Let's get this settled right now!" "What's the bottom line?" "Cut to the chase; what are the options?" "Here's how we'll proceed…" "I want to win this – no ifs ands or buts." "Tell me what the goal is." "You handle it, but keep me informed."	
	Party Person	"Hey! Here's an idea! Whattaya think?" "Why don't you noodle on that for a while?" "I feel this is the way we ought to go." "Tell me what you think about…" "Spare me the details. Just give me the drift." "I think we're making progress. Now let's…" "My sense is that…" "Let's try it a different way, just for kicks."	
	People Person	"I'd like to go kind of slow on this. Is that okay?" "Have we determined the impact of this on the staff?" "I really enjoy working with you." "I'd like to help you however I can." "We can work this out, I'm sure." "How do you really feel about this?" "How's this likely to end up? I'd like to know first."	
	Planner Person	"Now, let's look at this logically." "Is that really the right thing to do? Can we justify that?" "Let's take this first step. Then we can decide step two." "Give me all the facts first." "What guidelines make sense for this project?" "Precisely what do you mean?" "I don't want any surprises." "Have we touched all the bases?"	

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ADAPTING TO OTHER STYLES

- Think about someone you have trouble communicating with.
- Determine which style best represents that person.
- Click on the boxes for the tips you plan to use when communicating with that person.
- Plan your next interaction with that person and used the tips.
- Use the tool again to plan a conversation with another person.

☐ To adapt to People People

Be warm and sincere by:

- ☐ supporting their feelings by showing personal interest when possible
- ☐ assuming they'll take things personally
- ☐ allowing them time to trust you
- ☐ discussing personal feelings – not facts when you disagree
- ☐ moving along in a slower, informal, but casual steady manner
- ☐ showing that you're actively listening

☐ To adapt to Party People

Show interest in them by:

- ☐ supporting their opinions, ideas and dreams when possible
- ☐ being upbeat, stimulating and fast-pace
- ☐ tolerating digressions and not hurrying a discussion
- ☐ trying not to argue – you'll seldom win
- ☐ being enthusiastic, spontaneous and casual
- ☐ explaining how action can enhance their image
- ☐ sparing them the details

☐ To adapt to Planner People

Show yourself to be thorough:

- ☐ supporting their organized, thoughtful approach when possible
- ☐ showing commitment through your actions, not just words
- ☐ being detailed, accurate and logical
- ☐ listing advantages & disadvantages of any plan organized
- ☐ providing solid, tangible evidence
- ☐ adhering to established procedures
- ☐ giving assurances that decisions won't backfire on them

☐ To adapt to Point People

Be efficient and competent by:

- ☐ supporting their goals and objectives when possible
- ☐ keeping your relationship businesslike
- ☐ using facts – not personal feelings – if you disagree
- ☐ being precise, effective and well organized
- ☐ recommending alternate actions with brief supporting analysis
- ☐ getting to the point quickly
- ☐ stressing competitive results and growth opportunities

HOW TO USE STYLE RECOGNITION WITH YOUR TEAM

- Share the 4 styles with your team (page 9)
- Ask them to share their preferred style
- Share the verbal clues (page 11)
- Ask everyone on your team 1-2 ways they will practice adapting to styles that are different from their own (page 12)
- Challenge the team to practice adapting their style to fellow team members, customers, vendors, advisors, etc.

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TOOL 3: STAGES OF TEAM

Where is your team? What do you need to do to better understand the stage of your team?



DEFINITION: STAGES OF THE TEAM

NORMING

Working with each other

- Attempts to achieve harmony by avoiding conflict & reaching consensus
- Openness & friendliness
- Confiding in one another
- Sharing personal problems
- Increased energy & motivation (i.e., teamwork & meetings become fun & productive)

STORMING

Challenging each other

- Arguing
- Defensiveness & competitiveness
- Questioning others' knowledge & expertise (jealousy?)
- Concern & verbalization of "too much work"
- Questioning the team's ground rules
- Disagreements concerning team's purpose/ charter

PERFORMING

Working as one

- Close attachment to the team (i.e., team "ambassadors" and "cheerleaders")
- Ability to prevent and/or solve group problems & challenges
- Team productivity is very high

FORMING

Learning about each other

- Attempts to define the task
- Attempts to determine acceptable group behavior
- Lofty, abstract discussions of concepts & issues
- Discussion of symptoms or problems not relevant to the task
- Complaints about the organization & barriers to the task

Source: Dr. Bruce W. Tuckman, a professor of educational psychology at The Ohio State University

Notes:

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ACTIONS FOR TEAM LEADERS AND MEMBERS

Check boxes that will work for your team

NORMING

- [ ] Be an available resource for experiments team wants to try
- [ ] Check assumptions
- [ ] Help the group coordinate its activities
- [ ] Help the group critique itself
- [ ] Observe and assist when asked
- [ ] Help to ensure balanced participation
- [ ] Identify and manage resistance

STORMING

- [ ] Focus on differences and legitimize them
- [ ] Get the group to practice “Active Listening” techniques (paraphrasing/showing empathy)
- [ ] Encourage the open expression of feelings and concerns
- [ ] Continue the role definition process
- [ ] Facilitator/Team Member)
- [ ] Watch out for pseudo agreements
- [ ] Focus on problem definitions
- [ ] Help the group develop effective discussion skills
- [ ] Use conflict resolution strategies when appropriate

PERFORMING

- [ ] Closely monitor team results and progress
- [ ] Keep the momentum going
- [ ] Design ways to celebrate successes
- [ ] Assess gaps between team goals and actualities
- [ ] Discuss the team next steps
- [ ] Provide ways for the team to identify what’s been left undone
- [ ] Design ending ritual (s)

FORMING

- [ ] Help team members get acquainted
- [ ] Flush out and discuss team members’ expectations. Hopes. Concerns and fears
- [ ] Encourage team members to share expertise
- [ ] State purpose and goals (begin the “buy-in” process)
- [ ] Establish future team meeting dates, times, and sites 3-4 months in advance
- [ ] Develop team “Ground Rules”
- [ ] Develop team “Critical Success Factors”
- [ ] Establish methodologies for meeting minute taking and distribution
- [ ] Develop a system for archiving all future documents produced by the team
- [ ] Establish procedures for evaluating team progress

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HOW TO USE THE STAGES OF TEAM DEVELOPMENT WITH YOUR TEAM

- Review the descriptions of the 4 stages with your team (page 13)
- Ask your team what stage they think they're in
- Agree as a team on the actions to take to move through the stage (page 14)
- When you see things happening in your team, refer to this tool as a guide to help you move your team to high performance

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TOOL 4: LADDER OF INFERENCE

UP THE LADDER!

What you are thinking:



- **Data** – One committee member is looking at his phone and not contributing to the meeting.
- **Add Meaning** - When someone doesn't contribute it means they don't care.
- **Assumption** – If people don't care they shouldn't be invited to future meetings.
- **Actions** – I will not invite David to the next meeting.

Get off your ladder example:

- **Observable Data** – Speaker: "David, I saw you looking at your phone during the committee meeting, and noticed you did not say anything during the meeting."
- **Assumption** – Speaker: "It's my assumption you may not be engaged in this committee any longer."
- **Paraphrase and Dialogue** – David: "You saw me looking at my phone during the meeting and noticed I did not say anything. So you're concerned that I'm no longer engaged in the committee." Speaker: "Yes, thank you for hearing me." David: "Actually, my wife had an accident. She's okay but I was preoccupied with making sure she was alright."
- **Requested Future Behavior Change** – Speaker: "Wow, I didn't know that. In the future, if an emergency happens, please say "timeout" and let us know that you need to step out of the meeting. I agree that family comes first."

Write your observation from the video to complete the steps below:

ACTION

ASSUMPTION

ADD MEANING

OBSERVABLE DATA

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LADDER OF INFERENCE—REFLECTIVE LOOP

The ladder clearing (our beliefs affect what data we select next time)

- **Observable Data** – I see you are holding my cat and there is red dripping off the cat. I'm confused as to what is going on. One committee member is looking at his phone while someone else is speaking.
- **Assumption** – It's my assumption, you have hurt my cat with a knife.
- **Paraphrase and Dialogue** – Listener: You see me holding the cat and are confused what is going on. Speaker: Yes! Give me the details! Then they would have a conversation: Cat stepped on pan and that is spaghetti sauce not blood.
- **Requested Future Behavior Change** – Speaker: Keep cooking me dinner and make sure the cat is locked in the other room. They agree on that.

OBSERVABLE DATA

ASSUMPTION

PARAPHRASE AND DIALOGUE

REQUESTED FUTURE BEHAVIOR CHANGE

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SMALL GROUP ACTIVITY

BREAKOUT ROOM INSTRUCTIONS

- 12 minutes
- Assign:
  - Time Keeper – Keep time and help assign roles
  - Speaker (CEO=Jane) – Jane needs to share observable data, assumption and after Berry paraphrases and they dialog, she requests what she needs in the future
  - Listener (Employee=Berry) – Berry needs to paraphrase and clear up what happened
  - Observer/ Feedback Giver(s) – Give feedback to Jane & Berry after they clear their ladder – what worked? Anything you would recommend changing?
- Practice clearing the ladder - using the scenario below, pages 16 and 17 as examples, and this page as a guide.

CONFLICT SCENARIO

- An employee (Berry) committed to the CEO (Jane) that a report would be produced by EOB Tuesday.
- It is now Wednesday and Tuesday passed with no report.
- The CEO (Jane) does not have what's needed for a critical status update meeting with key customers which is happening Wednesday afternoon. Jane approaches Berry to clear this ladder with him.

OBSERVABLE DATA

ASSUMPTION

PARAPHRASE AND DIALOGUE

REQUESTED FUTURE BEHAVIOR CHANGE

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HOW TO USE THE LADDER OF INFERENCE WITH YOUR TEAM

- Teach the ladder
- Share pages 16 and 17 for examples
- Make a commitment to use the ladder when you have a misunderstanding or conflict
- Use the language, “I’m up a ladder,” or “are you up a ladder?” and “is now a good time to clear this up?

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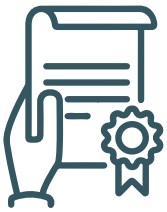
TOOL 5: TEAM GROUND RULES

Put a check by the ones you would like to adopt. Add new ones that would work for your team.



GROUND RULE	WHEN TO USE	
Mute yourself when you are not speaking	Call/Web Conference	☐
Use headphones	Call/Web Conference	☐
Minimize distractions	Call/Web Conference	☐
Check your internet speed (turn off your video if less than 5mb)	Call/Web Conference	☐
Avoid talking over others	All work situations	☐
Be Present/Don't Multi-task	All work situations	☐
Be Open, Honest and Respectful When Communicating	All work situations	☐
Suspend Self-Interest and Fully Listen to Other Opinions	All work situations	☐
Use an agreed upon decision-making process (i.e. Directive, Consensus, Analytical)	All work situations	☐
Clear up ladders within 48 Hours of the event	All work situations	☐
Call a "Time Out" if you feel the conversation is not valuable or if the topic is off track	All work situations	☐
Use the "Parking Lot" for any topics that are off the purpose of the meeting	Calls/Meetings	☐
		☐
		☐
		☐
		☐
		☐

HOW TO USE GROUND RULES WITH YOUR TEAM

- Show page this page to your team.
- Brainstorm meeting Ground Rules that you all want to adopt as a team.
- Multi-vote on the top 5-10 Ground Rules that the team is choosing to adopt.
- Show these Ground Rules at the beginning of key team meetings.

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WHAT 2 - 3 TOOLS WORK BEST FOR YOU AND YOUR TEAM?

WHAT'S NEXT?

1. Free Community of Practice on LinkedIn Groups
   https://www.linkedin.com/groups/13841506/
2. BONUS DOWNLOADS:

- Style Recognition Assessment: What is your preferred personality style?
  https://insideoutlearning.com/style/
- APQ Assessment
  https://insideoutlearning.com/ratemyapqs/

3. 5-Session Leadership Coaching Package

- Exclusive offer for WBENC! Use code WETHRIVECOACH for 15% off*
- **Code Expires 5/31/2025
- https://insideoutlearning.com/product/5-session-leadership-coaching-package/

4. Buy or share The Authenticity Code™ Book

- http://amzn.to/3nBRdXF

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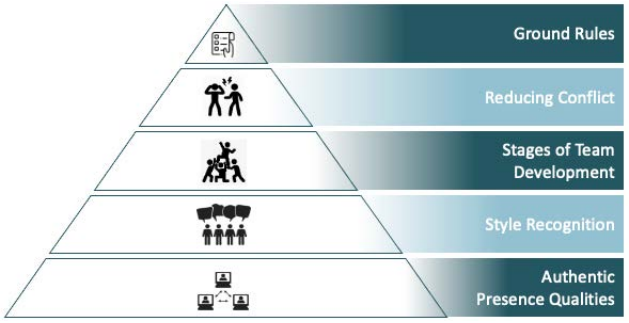

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