



PARTICIPANT WORKBOOK

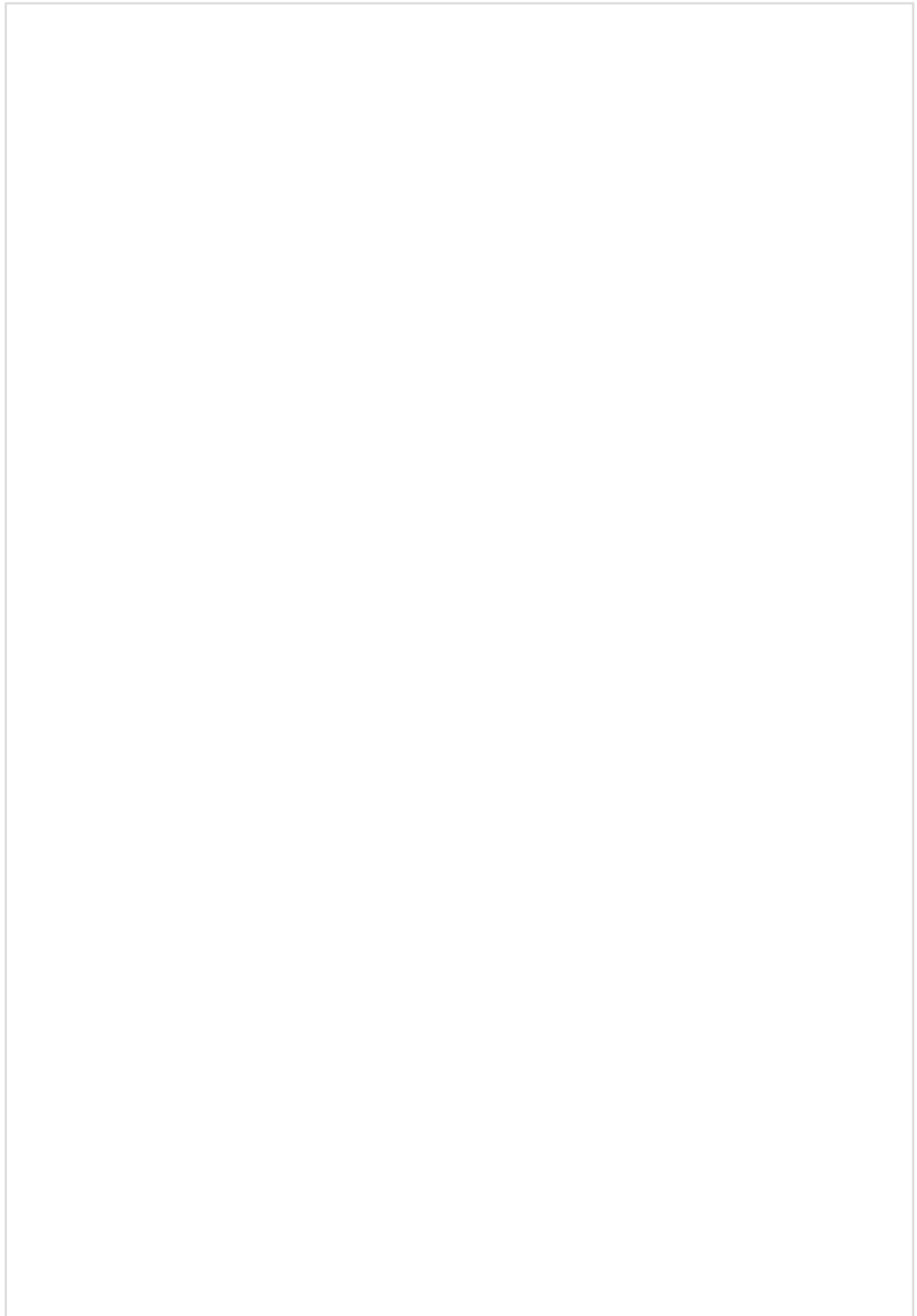
EXECUTIVE COMMUNICATION



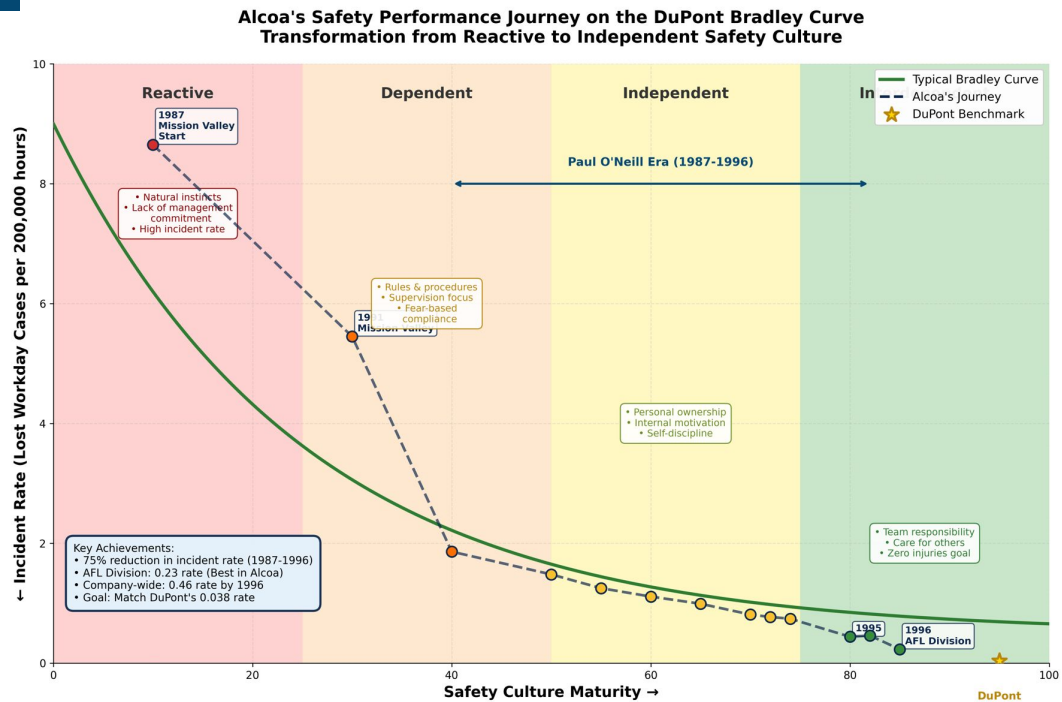
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TEAM PRESENTATIONS



DUPONT BRADLEY CURVE

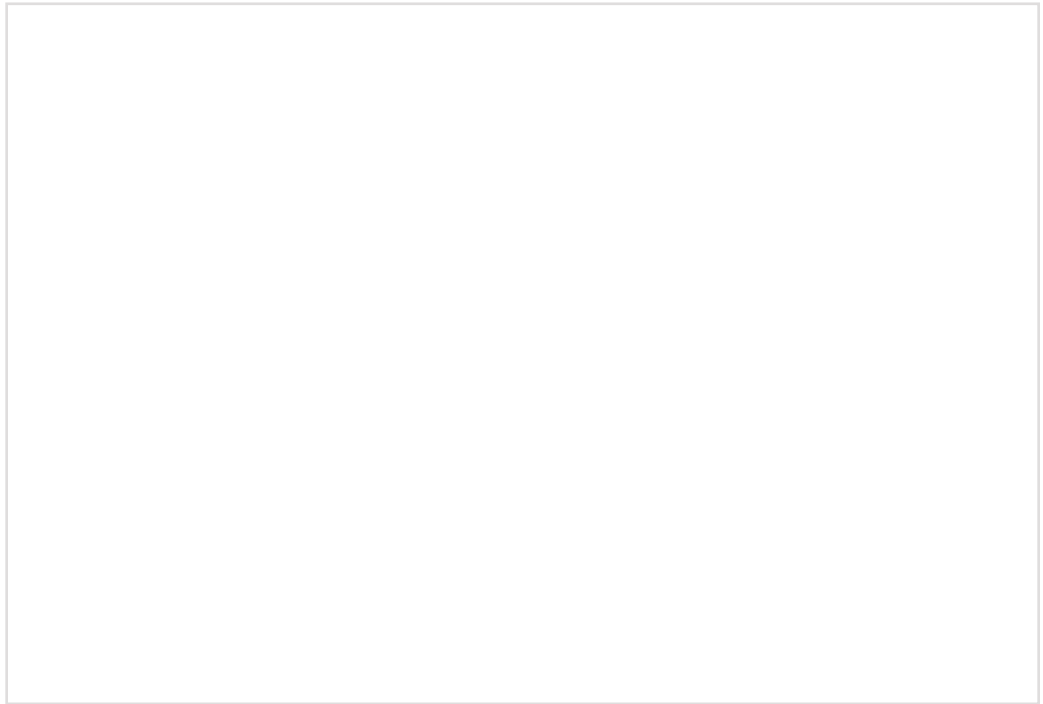


ALCOA FUJIKURA LIMITED

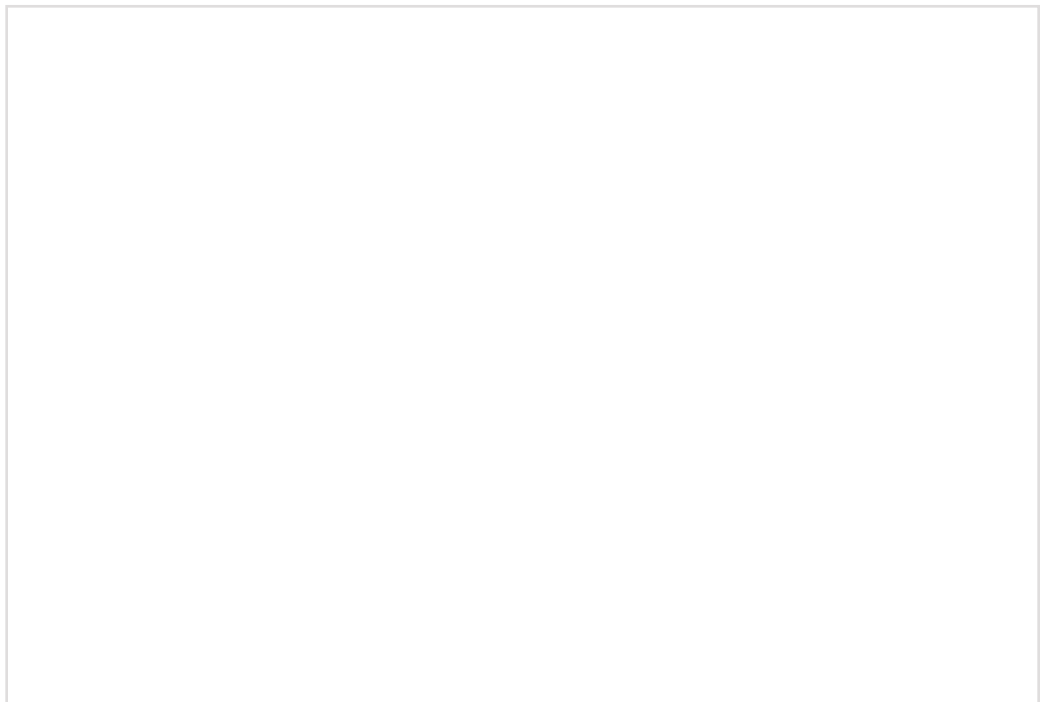
- **Headquarters:** Brentwood, Tennessee
- **Size:**
 - 1986: 10 plants and 3,000 employees
 - 1996: Over 40 plants and 26,000 employees
- **Revenue:**
 - 1986: \$11 million
 - 1996: \$1.4 billion
- **Performance Highlights:**
 - One of Alcoa's best performers in revenue, revenue growth, and safety
 - Generated more than 10% of Alcoa's total sales despite being just 1 of 21 business units
 - Achieved best-in-company safety record with 0.23 lost workday rate (compared to Alcoa's overall 0.46)
- **Strategic Importance:**
 - Highly valued by major customers, particularly one of the Big Three North American automobile manufacturers
 - Affirmed Paul O'Neill's belief that there's no trade-off between workplace safety and business priorities
 - Demonstrated that excellence in safety could coexist with exceptional business performance

The AFL Division exemplifies how a focus on safety culture can align with outstanding business results, making it a model within Alcoa.

STAR PROGRESS UPDATE



LEADERSHIP COMMITMENT



Building Your Executive Presence



Executive Presence

INSTRUCTIONS

What comes to mind when you hear the term “**Executive Presence**”?

Common Misconceptions

- ✗ Being the loudest person in the room
- ✗ Intimidating or dominating others
- ✗ Only for senior executives
- ✗ Fixed personality trait you're born with
- ✗ One-size-fits-all approach

Why it Matters

- Represents General Dynamics to our stakeholders
- Builds credibility with customers and leadership
- Enhances team effectiveness across operations
- Positions us for future opportunities
- Demonstrates GD ETHOS values in action



Small Group Discussion

What does executive presence look like at General Dynamics?

What do our stakeholders expect from us?

How is this different from other industries?

What specific behaviors demonstrate presence?

Executive Presence in OTS

- Technical credibility and precision
- Calm under high-stakes pressure
- Security and discretion
- Formal professionalism
- Clear chain of command respect
- Proactive problem-solving
- Commitment to Safety and Operation Excellence

Our Working Definition

The ability to inspire confidence in others through your competence, communication, and character — demonstrating that you are capable of handling whatever challenges arise.

The Three Pillars



HOW YOU ACT

67%



HOW YOU SPEAK

28%



HOW YOU LOOK

5%

Alignment & Consistency – The 3 Vs

Verbal – what we say

- Words you choose
- Vocabulary and grammar
- Jargon and idioms

Vocal – how we sound

- Tonality
- Pitch
- Pace of speech
- Volume

Visual – how we appear

- Posture
- Gestures
- Facial expressions
- Eye contact
- Attire

Impact of the 3 Vs

	Verbal (say)	Vocal (sound)	Visual (appear)
Percentage of communication	_____ %	_____ %	_____ %
Percentage of phone communication	_____ %	_____ %	0 _____ %

The Written Word

Email | Text messaging | Social media posts | IM/Teams

	Verbal (say)	Vocal (sound)	Visual (appear)
Percentage of written communication	100%	%	%

When your communication relies **100% on your words**, how do you adapt?

Leveraging Non-verbal Communications

- ✓ Stand up when you're presenting on the phone (changes vocal energy)
- ✓ Smile during important points (actually changes your tone)
- ✓ Vary your pace—slow down for important points, energize for action items
- ✓ Match your vocal energy to the message
(confident = steady tone; urgent = controlled faster pace)
- ✓ Eliminate filler words ('um,' 'uh,' 'like')
- ✓ Use purposeful pauses instead of filler words

Effective Writing

"Per our discussion, please send the updated specs by Friday."

VS.

"Hi Sarah - Following up on our conversation this morning. Would you be able to send the updated specs by Friday? That would help keep us on track for the Monday review. Let me know if you need anything. Thanks!"

- **Choose words carefully** - you have 100% of the burden
- **Use structure** - bullets, bold, spacing to add 'visual' component
- **Read it out loud** before sending - That's your 'vocal' check
- **Add warmth** - greeting, thanks, context (the human elements)
- **When in doubt, pick up the phone** - or turn on your camera



Gravitas: How You Act

- Confidence under pressure
- Sound judgment and decisiveness
- Emotional intelligence
- Integrity and authenticity
- Grace and composure
- Accountability and ownership

Demonstrating Gravitas

- ✓ Acknowledge mistakes quickly and propose solutions
- ✓ Stay calm when stakeholders challenge your approach
- ✓ Make tough calls with incomplete information
- ✓ Stand by your team when under pressure
- ✓ Admit 'I don't know, but I'll find out'
- ✓ Follow through on commitments consistently



Communication: How You Speak

- Clarity and conciseness
- Executive-level language
- Active listening
- Compelling storytelling
- Reading the room
- Adapting style to audience
- Written and verbal excellence

Effective Executive Communication

DO

- Lead with the bottom line
- Use data to support assertions
- Be concise | speak in headlines
- Pause and consider before responding
- Ask clarifying questions
- Manage internal emotional state
- Have a communication strategy

AVOID

- Rambling
- Over-explaining
- Rushing to fill silence
- Over-apologizing
- Getting defensive
- Emotional reactivity
- Not listening

NOTES:



Appearance: How You Look

- Professional presentation
- Body language and posture
- Energy and engagement
- Context-appropriate dress
- Virtual presence
- Non-verbal communication

Presence in Virtual Meetings

- Camera at eye level
- Professional background
- Good lighting
- Test tech beforehand
- Camera on when speaking
- Attentive body language
- Minimize multitasking
- Use chat strategically
- Speak clearly and pause

NOTES:

The 60-Second Elevator Pitch

A Framework for High-Impact Executive Communication

1. HOOK 5-8 sec

Compelling opening statement, question, or statistic that grabs attention.

Example: "What if I told you we could reduce [problem] by 40%?"

2. PROBLEM 10-12 sec

State the challenge clearly and why it matters to THEM.

What's at stake? (cost, risk, missed opportunity). Make it tangible and urgent.

3. SOLUTION 15-18 sec

Your proposal in one clear sentence, then briefly how it works.

Keep it simple—avoid technical jargon. Focus on the "what," not the "how."

4. VALUE 12-15 sec

Quantify the benefit and establish credibility.

ROI, timeline, or measurable outcome. Brief evidence: pilot results, comparable success, data point.

5. ASK 8-10 sec

Clear, specific call to action.

What do you want from them? Make it easy to say yes.

Example: "I'd like 15 minutes with your team next week to walk through the details."

Quick Tips for Delivery

- Practice until it feels natural, not memorized
- Pause after the hook—let it land
- End with confident eye contact on the ask
- Leave them wanting more, not checking their watch

Example 1: Predictive Maintenance Initiative

Scenario: Director of Manufacturing Engineering encounters VP of Operations near the elevator.

- HOOK:** "Mark, you know those unplanned line stoppages that cost us 12 days of production last quarter?"
- PROBLEM:** "Right now we're running reactive maintenance—we fix it when it breaks. That's costing us roughly \$2.3M annually in downtime, emergency repairs, and missed delivery windows."
- SOLUTION:** "My team has developed a predictive maintenance pilot using vibration sensors and existing PLC data. We can detect failures 2-3 weeks before they happen."
- VALUE:** "We ran a 90-day proof-of-concept—caught three failures, avoided 4 days of unplanned downtime. Projecting 35% reduction and payback in under 8 months."
- ASK:** "I'd like 20 minutes on your calendar next week to walk you through the full rollout plan. Would Tuesday or Thursday work better?"

The 60-Second Elevator Pitch

Example 2: Supply Chain Resilience

Scenario: Director of Supply Chain encounters the CFO in the cafeteria.

- HOOK:** "Susan, what would it mean for us if we could cut our critical component lead times in half while actually reducing cost?"
- PROBLEM:** "We currently single-source 23 mission-critical components. Last year, one supplier issue held up \$4.8M in shipments for six weeks."
- SOLUTION:** "I'm proposing a dual-source qualification program for our top 10 highest-risk components with volume-split agreements."
- VALUE:** "We piloted this on electronics assemblies—reduced lead time from 18 weeks to 9, negotiated 8% better pricing. Projecting \$1.2M annual savings."
- ASK:** "I need about \$180K in qualification costs. Can I get 30 minutes with you and procurement next week to review the business case?"

Example 3: Safety Culture Enhancement

Scenario: Senior Safety Manager encounters the President/GM walking to the parking lot.

- HOOK:** "Jim, I've found a way to cut our recordable injury rate by 40%—without adding headcount."
- PROBLEM:** "Our TRIR has plateaued at 1.8 for three years. 70% of incidents trace back to the same five behavioral patterns—and our current training isn't changing behavior."
- SOLUTION:** "I want to implement a peer-to-peer safety observation program with volunteer safety champions in each work cell."
- VALUE:** "Alcoa used this exact approach to set the global benchmark—and saw productivity gains as a side effect. I've mapped our pilot to three high-incident cells."
- ASK:** "I'd like your support to brief the operations leadership team. Can I get on your staff meeting agenda the week of the 15th?"

Example 4: Quality Improvement Initiative

Scenario: Quality Engineering Manager encounters VP of Programs at an all-hands meeting break.

- HOOK:** "Rachel, what if we could eliminate 80% of our first-article inspection rework before parts ever leave the supplier?"
- PROBLEM:** "We're rejecting 18% of incoming first-article submissions—that's burning 340 engineering hours monthly and delaying schedules an average of three weeks."
- SOLUTION:** "I'm proposing a digital first-article collaboration platform where suppliers upload data in real-time and we catch discrepancies at the machine."
- VALUE:** "Pilot with two suppliers: acceptance rate went from 82% to 97%, approval time dropped from 22 days to 6. That's a real schedule margin."
- ASK:** "I need IT support and \$60K for licenses. Can we set up a working session with you and IT leadership this month?"

Key Variations to Notice

Element	Manufacturing	Supply Chain	Safety	Quality
Hook Style	Question + stat	"What if" benefit	Bold claim	"What if" benefit
Problem Focus	Cost & risk	Contract exposure	Plateau & behavior	Time & rework
Proof Type	Internal pilot	Internal pilot	External benchmark	Internal pilot
Ask Specificity	Time + person	Budget + meeting	Agenda slot	Resources + session



Your Elevator Pitch

INSTRUCTIONS

Craft a 60-second program update for a GD executive.

Use the suggested outline.

Practice in pairs and provide feedback using the framework.

1. HOOK
5-8 sec

2. PROBLEM
10-12 sec

3. SOLUTION
15-18 sec

4. VALUE
12-15 sec

5. ASK
8-10 sec

Feedback Framework



NOTES:

General Discussion Guide For All Cases

Analysis Framework

Use this framework to analyze each scenario:

1. Initial Assessment

- What's really happening here?
- What are the underlying issues beyond the surface problem?
- What's at stake?
- Who are the key stakeholders and what are their concerns?

2. Gravitas (How You Act)

- How do you demonstrate composure?
- What shows sound judgment?
- How do you maintain emotional control?
- What demonstrates integrity and authenticity?

3. Communication (How You Speak)

- What's your key message?
- How do you structure your response?
- What tone is appropriate?
- How do you demonstrate listening?
- What questions should you ask?

4. Appearance (How You Present)

- What does your body language convey?
- How do you manage your facial expressions?
- What does your energy level communicate?
- How do you position yourself physically?

5. Follow-Through

- What immediate actions are needed?
- What commitments should you make?
- How do you restore or build confidence?
- What's your longer-term strategy?

CASE STUDY #1 (Group Discussion): THE CHALLENGED DELIVERABLE**Scenario**

You're presenting the monthly program status report to your GD-OTS customer in a formal review meeting. The presentation has been going well, and you're halfway through when you reach the slide on deliverables.

The senior GD program manager interrupts: "Hold on. I want to talk about this deliverable you submitted last week. Frankly, I'm concerned about the quality. It doesn't seem to meet the requirements we discussed, and I'm not sure how this made it through your internal review process."

Several of your team members are in the meeting. You can see them shifting uncomfortably. The GD-OTS manager continues: "This is the second month we've had issues with deliverables. I need to understand what's going on and how we can have confidence going forward."

The room is silent. Everyone is looking at you.

Discussion Questions

For Your Group to Discuss (10 minutes):

1. How should you respond in this moment?
 - What should you say first?
 - What tone should you use?
 - What information do you need?
2. What specific behaviors would demonstrate executive presence?
 - Consider gravitas, communication, and appearance
 - Think about both verbal and non-verbal responses
 - What would build or maintain credibility?
3. What responses would undermine your credibility?
 - What should you absolutely NOT do or say?
 - What reactions would make the situation worse?
 - What would damage the relationship?
4. What should you do after the meeting?
 - Immediate follow-up actions?
 - Internal conversations needed?
 - How do you rebuild confidence?

Key Principles to Consider

- Gravitas: Stay calm and composed; don't get defensive
- Communication: Acknowledge the concern directly and specifically
- Accountability: Own the issue without throwing team under the bus
- Problem-Solving: Focus on solutions, not excuses
- Follow-Through: Commit only to what you can deliver

Use this space to capture insights from your discussion:

Key insights from Case #1:

CASE STUDY #2 (Group Discussion): THE TEAM CONFLICT

Scenario

You're leading a weekly planning meeting with your integrated GD-OTS Industry team. The agenda includes task assignments for the upcoming sprint.

As you're reviewing the tasking list, a GD-OTS team member says, "I thought our Industry partner was handling the system integration tasks. That's what we agreed to last week."

The Industry Partner team member responds, "No, we were only doing the initial assessment. The integration work is clearly in GD-OTS's scope based on the SOW."

The GD-OTS team member's voice rises: "That's not what we discussed. You guys always try to push work back to us that should be in your lane."

The Industry Partner team member responds defensively: "That's not fair. We're doing everything that was agreed to. Maybe if GD-OTS communicated better internally, we wouldn't have these issues."

Other team members are starting to take sides. The discussion is becoming circular and heated. You're now 15 minutes over on this agenda item, and you have three more critical topics to cover. The meeting ends in 20 minutes.

Discussion Questions

For Your Group to Discuss (10 minutes):

1. How do you intervene in this moment?
 - What do you say to stop the escalation?
 - How do you refocus the discussion?
 - What tone do you set?
2. What leadership presence is required here?
 - What behaviors demonstrate gravitas?
 - How do you balance being firm and being respectful?
 - How do you address the behavior without attacking people?
3. How do you preserve everyone's dignity?
 - How do you avoid embarrassing team members?
 - How do you acknowledge legitimate concerns from both sides?
 - How do you maintain your relationship with both parties?
4. What's your path forward?
 - How do you resolve the immediate task assignment question?
 - What follow-up is needed?
 - How do you prevent future conflicts?

Key Principles to Consider

- Leadership: Taking control without being controlling
- Fairness: Not showing favoritism between GD-OTS and Industry Partner
- Decisiveness: Making a call when consensus isn't possible
- Emotional Intelligence: Reading and managing the room's dynamics
- Professionalism: Maintaining partnership standards

Additional Context

Remember: GD-OTS is the prime contractor and leads this effort. Industry Partner is a valued partner, but GD-OTS sets the tone and direction. You need to demonstrate leadership while maintaining a productive partnership

Use this space to capture insights from your discussion:

Key insights from Case #2:

Body Language Matters

- Power postures: stand/sit tall
- Open posture
- Eye contact
- Purposeful gestures
- Controlled movements

Avoid:

- Crossed arms, fidgeting, looking down, or slouching

Undermining Behaviors

- Over-apologizing
- Defensive reactions
- Blaming others
- Rambling answers
- Poor preparation
- Lack of follow-through
- Emotional reactivity
- Inconsistent behavior
- Not listening

NOTES:

CASE STUDY #3 (Role Play): YOUR IFS ADOPTION PROJECT

Role-Play Guidance

Roles Needed:

- Primary Presenter (Decathlete responding to the challenge)
- Mock ELT Members (2-3 people asking challenging questions)
- Observer(s) (watching and providing feedback)

Process:

1. Assign roles
2. Run the scenario (5 minutes)
3. Pause and discuss (5 minutes)
 - What worked well?
 - What could be enhanced?
 - What else could have been done?
4. Optional: Run it again with adjustments
5. Rotate roles if time permits

Mock ELT Personas (Choose 2-3):

- The Skeptical CFO: We already paid for this system - why more investment?
- The Defensive Sponsor: Championed IFS originally; feels blamed for adoption issues
- The Operations Protector: Guards team bandwidth; people are already overwhelmed
- The Change Fatigued: We've tried to fix this before; why is this different?
- The System Skeptic: Maybe we should cut our losses and try something else

Scenario

You and your Decathlon project team have been invited to present your IFS adoption strategy to the GD-OTS Executive Leadership Team. GD-OTS invested significantly in the IFS ERP system, but adoption has been disappointing - many employees continue using legacy processes, spreadsheet workarounds, and informal systems instead of IFS. Your team has been tasked with developing a change management strategy to drive full utilization of the system.

This is a 20-minute presentation slot in their quarterly business review, with 10 minutes reserved for Q&A.

Your presentation covers:

- Root cause analysis of current adoption resistance
- The cost of the current state - dual systems, workarounds, data integrity issues
- Proposed change management strategy and implementation roadmap
- Stakeholder engagement and communication plan (continued on next page)

Scenario (cont.)

- Training and support approach
- Success metrics and accountability measures

You've just finished presenting your root cause analysis - which identified that the original IFS implementation lacked adequate change management - when the VP of Operations leans forward and says:

"Let me be direct with you. We've already spent millions on IFS. Now you're telling me we need to spend more money and pull people off their real jobs to fix an adoption problem? My supervisors say the system doesn't work for how we actually operate. Maybe the problem isn't change management - maybe the problem is we bought the wrong system. Why should I force my people to use a tool they've already rejected?"

The room goes quiet. The VP of Finance is reviewing your budget slide with a skeptical expression. The SVP who championed the original IFS purchase shifts uncomfortably. Eight senior executives are watching to see how you respond. Your project team members are looking to you for leadership.

This is your moment to demonstrate executive presence.

Sample Challenging Questions for Mock ELT:

1. "People have been working around IFS for two years now. Those work-arounds are baked in. You're asking them to unlearn what's working."
2. "The original implementation team said adoption would happen naturally. It didn't. Why will your change management approach be any different?"
3. "You're basically saying we failed the first time. How does that message land with the people who led that implementation?"
4. "My best supervisors say IFS doesn't match how we actually do work. Are you saying they're wrong?"
5. "What's the stick? If people can keep using their workarounds with no consequences, why would they change?"
6. "How do we know this is a change management problem and not a system capability problem?"

Observer Feedback Focus:

- Specific behaviors you noticed (positive and developmental)
- Impact of those behaviors on perceived credibility
- Alternative approaches to consider
- How well did they acknowledge past challenges without blame?
- Connection to GD ETHOS values in responses
- Body language and voice tone under pressure

Use this space to capture insights from your discussion:

Key insights from Case #3:

How I can apply these lessons to my IFS presentation:

Executive Presence Assessment

Name: _____

Date: _____

Instructions: Rate yourself on each statement using the following scale:

1 = Rarely/Not at all | 2 = Sometimes | 3 = Often | 4 = Very Often | 5 = Always/Consistently

PART 1: GRAVITAS (How You Act)

Confidence & Composure

- ___ 1. I remain calm and focused under pressure or in high-stakes situations
- ___ 2. I maintain composure when receiving criticism or pushback
- ___ 3. I project confidence without appearing arrogant
- ___ 4. I stay centered when dealing with ambiguity or uncertainty
- ___ 5. I handle unexpected challenges with grace and poise

Decision-Making & Judgment

- ___ 6. I make timely decisions with the information available
- ___ 7. I demonstrate sound judgment in complex situations
- ___ 8. I'm willing to make tough calls when necessary
- ___ 9. I take calculated risks when appropriate
- ___ 10. I stand by my decisions while remaining open to feedback

Emotional Intelligence

- ___ 11. I accurately read the emotions and dynamics in a room
- ___ 12. I manage my own emotions effectively in professional settings
- ___ 13. I respond empathetically to others' concerns or perspectives
- ___ 14. I adapt my approach based on others' needs and situations
- ___ 15. I build trust through authentic interactions

Integrity & Accountability

- ___ 16. I acknowledge mistakes quickly and own them
- ___ 17. I do what I say I'll do consistently
- ___ 18. I give credit to others for their contributions
- ___ 19. I hold myself to the same standards I expect of others
- ___ 20. I act consistently with my stated values

GRAVITAS SUBTOTAL: _____ / 100

PART 2: COMMUNICATION (How You Speak)

Clarity & Conciseness

- ___ 21. I communicate my ideas clearly and concisely
- ___ 22. I lead with my main point before providing details
- ___ 23. I avoid jargon when speaking with non-technical audiences
- ___ 24. I tailor my message to my audience
- ___ 25. I can explain complex topics in simple terms

Active Listening

- ___ 26. I listen fully before formulating my response
- ___ 27. I ask clarifying questions to ensure understanding
- ___ 28. I demonstrate that I've heard others through my responses
- ___ 29. I avoid interrupting when others are speaking
- ___ 30. I pick up on both verbal and non-verbal cues

Speaking Effectiveness

- ___ 31. I speak with appropriate volume and clarity
- ___ 32. I use purposeful pauses for emphasis
- ___ 33. I vary my tone to maintain engagement
- ___ 34. I minimize filler words (um, like, you know)
- ___ 35. I speak at an appropriate pace (not too fast or slow)

Interpersonal Skills

- ___ 36. I read the room and adjust my approach accordingly
- ___ 37. I acknowledge others' perspectives before sharing my own
- ___ 38. I ask insightful questions that move discussions forward
- ___ 39. I provide constructive feedback effectively
- ___ 40. I handle disagreements diplomatically

Written Communication

- ___ 41. My written communication is clear and professional
- ___ 42. I proofread important communications before sending
- ___ 43. I respond to emails and messages in a timely manner
- ___ 44. I structure written content logically
- ___ 45. I match my written tone to the situation and audience

COMMUNICATION SUBTOTAL: _____ / 125

PART 3: APPEARANCE (How You Look)

Professional Presentation

- ___ 46. I dress appropriately for my role and the situation
- ___ 47. My appearance is polished and professional
- ___ 48. I maintain good personal grooming
- ___ 49. I consider the cultural and organizational context in my appearance
- ___ 50. I project energy and engagement through my presence

Body Language

- ___ 51. I maintain appropriate eye contact in conversations
- ___ 52. My posture conveys confidence and engagement
- ___ 53. I use purposeful gestures when communicating
- ___ 54. I'm aware of and manage nervous habits (fidgeting, etc.)
- ___ 55. My body language is open and approachable

Virtual Presence

- ___ 56. I use an appropriate background for virtual meetings
- ___ 57. My camera is positioned at eye level for video calls
- ___ 58. I have good lighting in my virtual meeting space
- ___ 59. I maintain engagement and attentiveness in virtual settings
- ___ 60. I test my technology before important virtual meetings

APPEARANCE SUBTOTAL: _____ / 75

SCORING SUMMARY

Category	Your Score	Maximum	Percentage
Gravitas	_____	100	_____ %
Communication	_____	125	_____ %
Appearance	_____	75	_____ %
TOTAL	_____	300	_____ %

INTERPRETATION GUIDE

80-100%: Strong executive presence in this area. Continue to model and refine.

60-79%: Solid foundation. Identify specific skills to develop further.

40-59%: Opportunity for growth. Focus development efforts here.

Below 40%: Significant development needed. Prioritize this area.

REFLECTION QUESTIONS

1. My TOP 2 STRENGTHS in executive presence are:

a. _____

b. _____

2. My TOP 2 DEVELOPMENT AREAS are:

a. _____

b. _____

3. Specific situations where I want to demonstrate stronger executive presence:

4. Who can support my development? (mentors, colleagues, peers)



Your Personal Development Plan

INSTRUCTIONS

Answer the questions below and be ready to share with the group:

What is your top **executive presence strength**?

What is your primary **development area**?

What **three specific actions do you commit to** in the next 30 days?

How will you **measure progress**?

What **support** do you need?

Continuing Your Development

- 30-day follow-up check-in
- Optional coaching sessions
- Peer feedback opportunities
- Recommended reading list
- Team support and observations
- Pair up with an accountability partner

Moving Forward

Executive Presence:

It's not about being someone you're not, it's about being the best version of who you are.

Your Challenge:

Start implementing one new behavior tomorrow.

NOTES:

One-on-Ones That Work

Guided Conversations That Drive Performance



Who Did it Best?

INSTRUCTIONS

Think about a leader you worked for that conducted the most effective 1:1s you ever had:

What did they **do (or not do)** that made them effective?

What was **their impact** on you?

ACTIVITY



What Gets in the Way?

INSTRUCTIONS

This is a group brainstorm. You are welcome to take notes.

NOTES:

ACTIVITY



What are the Benefits of Good 1:1s?

INSTRUCTIONS

This is a group brainstorm. You are welcome to take notes.

NOTES:

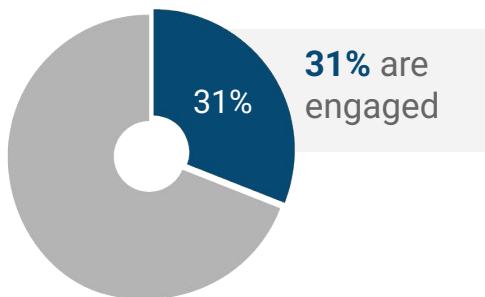
Why You Need Them – Engagement

Employees want **fewer** meetings with the exception of **one meeting type**.

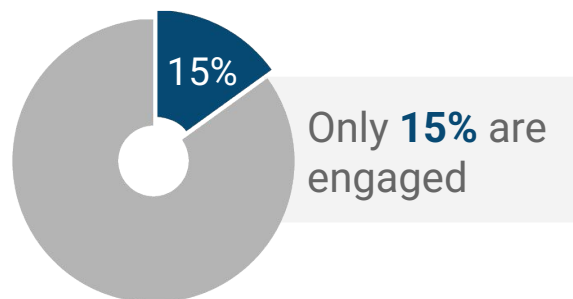
They want more what?

How often do they want them?

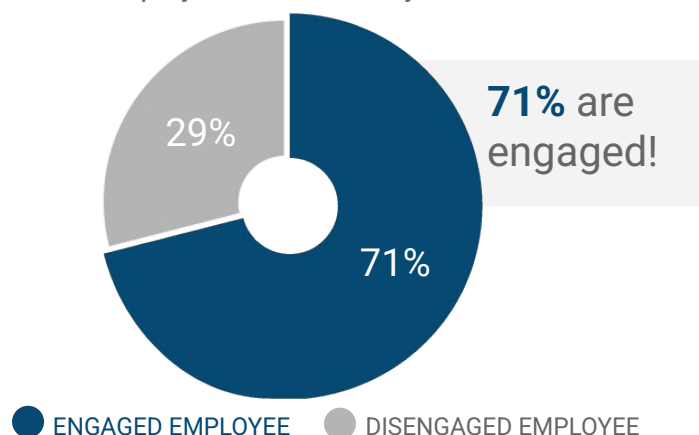
National Average of Engaged Employees



Employees WITHOUT weekly 1:1s



Employees WITH weekly 1:1s



Key Ingredients for Success



Roles and Expectations



Powerful Questions



Structure and Consistency



Active Listening



Quality of Feedback



Predictive Index Data

NOTES:



Roles and Expectations

The role of a **leader**:

DO:

AVOID:

The role of an **employee**:

DO:

AVOID:



Accountability

What Accountability is:

- Setting clear expectations
- Monitoring progress
- Providing support
- Recognizing results
- Addressing shortfalls

What Accountability Does:

- Aligns expectations
- No surprises
- Offers transparency
- Builds trust
- Weathers storms

Holding someone accountable means they are expected to own their responsibilities and face appropriate outcomes based on their performance – **positive or negative.**

91% of employees say “effectively holding others accountable” is a top need.

40% of employees feel their manager actually holds them accountable to their goals.

Employees **want** to be held accountable.

Being prepared **matters.**

- An employee should show up prepared for their agenda items.

Stay on **target.**

- If your employee goes over time, end the meeting.
- Stick to the agenda and timing to focus on what’s most critical.

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Structure and Consistency

Structured & Purposeful

- Use formal meeting agendas and track action items and progress.
- Focus on moving forward and going narrow and deep.

Consistency

- Consistency is critical: only commit to what you can do consistently, not perfectly.

Specific Goals

- Make narrow, written, defined goals:
 - Five, not 15
- Discuss areas for improvement/development one at a time:
 - People struggle to improve more than one thing at once.

1.	Feedback and development (employee and leader) Situation-specific In context of development plan Status on action items/next steps	5 min
2.	Weekly updates (employee) Wins: status only, less context Misses: status only, less context Insights: key items, not all items	5 min
3.	Priorities and issues (employee) Top three in next 30 days What success looks like and the timeline What do you need from me as your leader?	10 min
4.	Leader's turn (leader) Anything the leader wants to discuss Feedback to share Confirm action items	5 min
5.	Verbal summary (employee) Decisions, actions, timelines, responsible party Use to clarify any ambiguity	5 min



Agenda Elements

	Description	Value
1. Feedback and development	Actionable, constructive feedback, recognition, or coaching with the intent to help someone grow, improve, build on their strengths, and/or raise their self-awareness.	Sets the expectation that development will be an ongoing conversation. Makes feedback easier by breaking it into consistent, bite-size pieces. Reinforces the employee's sense of growth, boosting engagement and retention.
2. Weekly updates	A concise status update of the successes, setbacks, and challenges on a direct report's most important current priorities. Not an accounting of every detail or item. A quick "scorecard" (even on qualitative items), not a place/time for deep discussion.	Keeps leader and direct report aligned on key priorities (no surprises). Can help a direct report more comfortably deliver bad news AND feel comfortable talking about wins. Flags topics that may need deeper discussion.
3. Priorities and issues	Focuses on upcoming priorities and current challenges, ensuring alignment and clarifying where support is needed. Both parties align on action items to go forward.	Promotes ownership by having the direct report define priorities, while giving them a clear space to request support—especially helpful for those who struggle to ask. Ensures they're focused on the right things with no surprises.
4. Leader's turn	Opportunity for leader to provide additional feedback on anything they may have learned during weekly updates and priorities/issues. A chance to talk about ANYTHING else on their mind, probe into certain areas with deeper questions, etc.	Gives the leader a chance to address/discuss anything additional. Gives the leader the "last word" on things, as necessary.
5. Verbal summary	A quick but detailed recap to confirm understanding and alignment on decisions, actions, feedback, ownership, and timelines, so there is strong alignment.	Significantly reduces assumptions and miscommunication, and as a result increases speed to productivity.

The Impact of Canceling 1:1s

NOTES:

- Shows employee they are not your priority.
- Employee may have been waiting to bring up an issue.
- Misses the opportunity to connect.
- Erodes trust, productivity, engagement.



Quality of Feedback

Feedback is more than recognition.

Recognition is **appreciation**.

Feedback is **actionable**.

Low Quality

- Clichés, hyperbole, fixed mindset
 - You always, you never, you constantly...
 - You are really smart.
 - You are the best I've ever seen at...
- Comments about personality
 - Nice, friendly, abrasive, opinionated, confident

High Quality

- Focused on variables, growth mindset
 - Knowledge, skills, abilities, attitude, perspective, etc. that a person can impact, improve, change.
- Is specific, relevant, actionable

People who receive low quality performance feedback are **2x** more likely to quit than those who receive high quality feedback.

When employees understand expectations, they are more likely to stay.

Among employees planning to stay:

61%

understand what their manager expects of them.

Among employees planning to leave:

21%

understand what their manager expects of them.

[Textio](#), Language Bias in Performance Feedback, 2024



Giving Good Feedback

Timely:

Specific:

Sincere:

"John, I want to tell you what an excellent job you did handling that upset customer yesterday. They were clearly angry and emotional – and with good reason. Yet, you did a remarkable job really listening to them and staying calm. That helped the customer feel heard and then they were able to calm down. Because of how composed and thoughtful you were, you turned an angry customer into one who left feeling heard and valued. That is the kind of thing that helps us keep our customers and makes our entire organization successful."

Examples

Recognition:

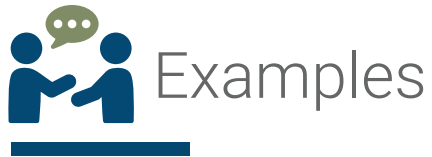
1. Observation
2. Impact

"You did an excellent job during your presentation yesterday. You were well prepared, your delivery was thoughtful and persuasive, and best of all, you handled a number of skeptical, difficult questions with composure and patience. All of this really added to your personal credibility and the credibility of the project."

Encouragement:

1. Observation
2. Encouragement
3. Question (how to do more, more often, etc.)

"When you asked <XYZ> question in the team meeting, it really gave us some insight we needed to improve the timeline. Tell me your thoughts on how can we incorporate that thinking into other project meetings."



Constructive/Critical:

1. Observation
2. Impact
3. Confirmation (do they agree/see it that way?)
4. Question (I wonder how...?)

"I noticed when you present to the team, sometimes you get so excited that you don't pause enough to bring others into the conversation. This can cause the team to hold back their thoughts. Have you noticed that? Let's explore what we can do differently to help the team feel as excited as you are and create more inclusion."

Managing Accountability:

1. Observation
2. Impact
3. Question (obstacles, how to get going)

"I've noticed that the process for approving published materials slows down the project. This affects the team's overall timeline for producing new content. Share your perspective on what's happening here."

Developmental:

1. Observation/future state/purpose/goal
2. What it will do for the them, and the team/organization
3. Observation
4. Confirmation (do they agree/see it that way?)
5. Question (I wonder how...?)

John, I'd like to talk about you taking the next step and start handling more complex customer troubleshooting cases.

I've seen what a great job you do providing thoughtful, high quality service to our customers. They consistently have rave reviews about your expertise and helpfulness.

Doing this would give you an opportunity to flex your customer service excellence while challenging you to build new skills and grow your expertise. It would also start you on a path to the next level role and compensation here, which I know is important to you. And our organization and customers would really benefit from your capabilities in this area.

Tell me your thoughts about this idea. Share what's interesting or exciting about it and anything you might be worried about.

What do you think might be the best way to start working on this?



Coaching High Performers

INSTRUCTIONS

What's difficult about coaching High Performers?

What gets in the way?

NOTES:

High-Performer Stats

800%

High performers are 800% more productive than your average employee.

53%

Only 53% say their manager sits down with them monthly.

63%

Employees are 63% more likely to quit if they get low quality feedback.

Feedback

High performers are more motivated than any other group by constructive and critical feedback.

1.8

They receive 1.8 instances of "exaggerated" feedback (low quality) for every instance of feedback all other employees receive.



Who Really Has “All” the Answers?

INSTRUCTIONS

Answer the following:

Why did **you get promoted** to a leadership role?

What are the benefits of **asking questions vs. having all the answers?**



Powerful Questions



Investigative

Reveals what is most important to a person that would get them to take action. Starts with Describe, Tell, Share, Explain, Help me understand. Short, broad, wide-open.

Describe what's most important to you.

(Not: What's most important about your career?)



Speculative

"What if" questions that cause people to slow down, consider other options, and overcome limiting assumptions/mindsets

I wonder how you might...



Productive

Cuts to the "Now what?" of an issue. Helps a person think through process, where to start, resources needed, their capabilities, etc.

Describe, how can you get started?



Interpretive

Gets at the "So what?" Pushes people to redefine the real issue and go beneath the surface.

Tell me, what happens if this continues?



Subjective

Targets what is unsaid. Reveals emotions, personal feelings, frustrations, confidence, tensions, and buy-in.

Share, how do you really feel about _____?



Questions Role Play

INSTRUCTIONS

1. In the role of Employee, pick the biggest **real goal or challenge** you're working on right now and describe that to your partner in as much detail as possible. (3-5 minutes)
2. In the role of Leader, write down five questions (one from each category) that you will ask the employee using your Questions Library on page 32.
3. Role play this 1:1 for 5-7 minutes.
4. When you've finished, Employee, tell the leader how you felt when the leader asked these questions. Leader, how much quality information did you learn as a result of asking these questions?
5. Switch roles and do another round.

Leader Questions:

Active Listening

Reminders:

- Take notes with keywords
- Pause for five seconds after a question
- “Interesting, tell me more.”

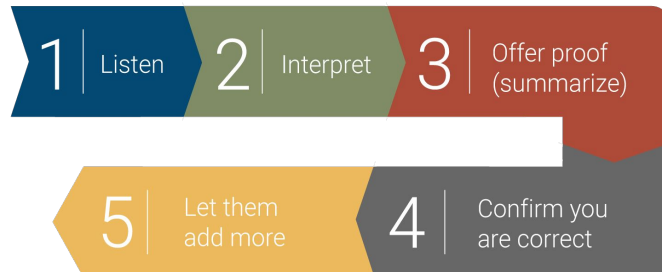
The Verbal Summary

“So, what I heard you say was...

What I think that means is...

Did I get that right?

Is there anything else?”





Self-Awareness

Strength	LOW	CAUTION	FACTOR	Strength	HIGH	CAUTION
Selflessly interested in others. Will delegate. Approachable.	May shy away from critical feedback. Doesn't like to push. May take on too much to "help."		A Dominance	Holds people accountable. Will push/challenge. Not shy with conflict.	Difficulty delegating authority. Holds onto control. May intimidate.	
Thoughtful, reflective. Naturally asks good questions. Factual.	Can be hard to read. May not share feedback frequently enough. May be dismissive of "feelings."		B Extraversion	Inclusive. Communicative. Persuasive and motivating.	May be too talkative, too trusting. May avoid conflict to preserve relationship.	
Handles change and variety comfortably. Will push and challenge.	Naturally selective listener. Impatient with repetition.		C Patience	Thoughtful listeners. Predictable, dependable. Even-keeled.	May not push/challenge. May be overly tolerant. Takes too long to decide.	
Big picture focus Let's direct own details. Mistakes = learning.	May struggle with process/agenda. May not provide enough structure/clarity.		D Formality	Good at creating process. Holds directs accountable to plan. High quality standards for success.	May micromanage. Overly critical of mistakes. Struggles to delegate.	

NOTES:



Self-Reflection

INSTRUCTIONS

Using the behaviors chart on the previous page, circle the items that stand out to you in how your behaviors impact your 1:1s.

My **key strengths** in 1:1s.

My **key cautions** in 1:1s.

My **key takeaways** and **actions**.



Adapting to Maximize Impact

LOWEST	FACTOR	HIGHEST
Give reassurance of their role and your confidence in them. They like freedom from conflict and competition. "World peace."	A Dominance	Always challenge them to up their game/achieve more. Focus on outcomes/impact: They win if <x>. They lose if <y>.
Give them private time to think. Written communications. Substance, no fluff. Don't put them on the spot.	B Extraversion	Do NOT cancel their 1-1. Give recognition for how they are impacting others. Share info early on and ask for their input. Let them talk as a way to think.
Load them up with work, variety, challenge. Brief, concise communications focused on actions. Reinforce and check for understanding on the most important elements.	C Patience	Give time to consider, bring back questions. Time to get ready/build a plan. State the why. Offer clear timelines and deadlines but don't pressure.
Give outcomes/deliverables with clear guardrails but room to figure out how. Help them think through mundane details, contingencies.	D Formality	Offer depth and clarity of expectations (in writing) to get started. Ask, "What else do you need to begin?" and "What are you worried about?" Frequent, ongoing feedback.

NOTES:



Using PI Data

INSTRUCTIONS

1. Look at your direct report's behavioral graph and identify their highest (farthest right) and second-highest (farthest left) Motivating Needs.
2. Look back to the Strengths, Cautions, and Impact Maximizers on pages 19 and 21 and write down one to two Dos/Don'ts for each direct report.

Employee Name	Strongest Motivating Need	2nd Strongest Motivating Need	Do	Don't



Creating Buy-in

If you **are not** currently doing 1:1's but plan to start ...

State the goal: Why have 1:1's?

Define roles: Give the rationale for each role and clarify understanding.

Share proposed agenda: Gain alignment.

Agree on cadence and length: Discuss logistics.

Summarize and gain agreement: Clarify, answer questions, review.

If you **are** currently doing 1:1's and want to enhance ...

Share the goal: "We can make these more effective and valuable."

Discuss what to "start/stop/continue": Gain agreement.

Describe/define new role expectations: Rationales and benefits.

Define the new/modified agenda: Purpose and expectations.

Agree on cadence and length: Discuss logistics.

Summarize and gain agreement: Clarify, answer questions, review.

NOTES:

ACTION PLANNER

Planning my new 1:1

Employee Name:

Look at your employee's strongest Motivating Needs. Circle the highest (furthest right) and lowest (furthest left) factor. Write in their strongest below.

Strongest Motivating Need:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

Do and Avoid: Based on your employee's highest and lowest factor, circle or check one-two items to which you will adapt.

LOWEST	FACTOR	HIGHEST
Give reassurance of their role and your confidence in them. They like freedom from conflict and competition. "World peace."	A Dominance	Always challenge them to up their game/achieve more. Focus on outcomes/impact: They win if <x>. They lose if <y>.
Give them private time to think. Written communications. Substance, no fluff. Don't put them on the spot.	B Extraversion	Do NOT cancel their 1-1. Give recognition for how they are impacting others. Share info early on and ask for their input. Let them talk as a way to think.
Load them up with work, variety, challenge. Brief, concise communications focused on actions. Reinforce and check for understanding on the most important elements.	C Patience	Give time to consider, bring back questions. Time to get ready/build a plan. State the why. Offer clear timelines and deadlines but don't pressure.
Give outcomes/deliverables with clear guardrails but room to figure out how. Help them think through mundane details, contingencies.	D Formality	Offer depth and clarity of expectations (in writing) to get started. Ask, "What else do you need to begin?" and "What are you worried about?" Frequent, ongoing feedback.

Goals:

My main goals with starting the 1:1s are:

☐ Coaching ☐ Connection ☐ Development ☐ Other _____

Questions Library:

Refer to the questions library in your workbook and write questions you want to use more often with this employee:

Timing: *Frequency*

Timing: *Length*

Agreement:

I will meet with this person and get agreement on new 1:1 approach by the following date:

Opening Conversation Checklist:

- ☐ Goals and value of 1:1s (Why?)
- ☐ What's in it for the employee (and leader)?
- ☐ Gauge their reaction/input/opinion of having 1:1s
- ☐ Agenda agreement (step/purpose/owner)
- ☐ Roles and expectations (Who will prepare what?)
- ☐ Metrics and data to measure goals during these 1:1s
- ☐ Questions, concerns, other input
- ☐ Agree on start date
- ☐ Verbal summary of who owns what and when

ACTION PLANNER

Enhancing my existing 1:1

Employee Name:

Look at your employee's strongest Motivating Needs. Circle the highest (furthest right) and lowest (furthest left) factor. Write in their strongest below.

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

Strongest Motivating Need:

Do and Avoid: Based on your employee's highest and lowest factor, circle or check one to two items to which you will adapt.

LOWEST	FACTOR	HIGHEST
Give reassurance of their role and your confidence in them. They like freedom from conflict and competition. "World peace."	A Dominance	Always challenge them to up their game/achieve more. Focus on outcomes/impact: They win if <x>. They lose if <y>.
Give them private time to think. Written communications. Substance, no fluff. Don't put them on the spot.	B Extraversion	Do NOT cancel their 1-1. Give recognition for how they are impacting others. Share info early on and ask for their input. Let them talk as a way to think.
Load them up with work, variety, challenge. Brief, concise communications focused on actions. Reinforce and check for understanding on the most important elements.	C Patience	Give time to consider, bring back questions. Time to get ready/build a plan. State the why. Offer clear timelines and deadlines but don't pressure.
Give outcomes/deliverables with clear guardrails but room to figure out how. Help them think through mundane details, contingencies.	D Formality	Offer depth and clarity of expectations (in writing) to get started. Ask, "What else do you need to begin?" and "What are you worried about?" Frequent, ongoing feedback.

Goals:

My main goals with starting the 1:1s are:

☐ Coaching ☐ Connection ☐ Development ☐ Other _____

ACTION PLANNER

Enhancing my existing 1:1

Rankings Guide:

Use these numbers to rank how your 1:1s have been so far.

1 = We/I haven't been doing this and/or it has not worked effectively.

3 = We/I have been doing this, but the consistency/effectiveness/impact could improve.

5 = While not perfect, we/I have been doing this consistently and it has been effective.

Structured & Purposeful Meetings:

RATING:

_____ We use a formal meeting agenda.

_____ We stay narrowly focused on the goals, development, and issue resolution.

_____ The employee comes to our meetings prepared with agenda items, topics of discussion, and candid updates on their progress since our last meeting.

For this category, the item that is most successful is:

One area for focus and improvement that would make a difference is:

Quality of Conversations:

RATING:

_____ My employee is open, candid and vulnerable during our conversations.

_____ My employee will share and advocate for what they need from their leader.

_____ I ask a lot of questions as their leader.

_____ I challenge my employee and hold them accountable.

_____ I don't "hog the microphone," don't "direct," and usually let the employee create the idea, solution, or next step.

For this category, the item that is most successful is:

One area for focus and improvement that would make a difference is:

I will meet with this person and get agreement on updated 1:1 approach by (date): _____



Conclusion/Wrap-up

INSTRUCTIONS

Answer the questions below and be ready to share with the group:

What **ONE most important action/commitment** will you will take?
WHEN will you take it and how will you know you've been successful?

Choose an **accountability partner**. Write their email address here.
Share your commitment with them and describe what would keep you accountable. Be prepared to share out loud.

Date of follow-up:

Appendix

Continue Learning

- Books: Executive Presence (Sylvia Ann Hewlett)
- Presence (Amy Cuddy)
- The CEO Next Door (Elena Botelho)
- Online:
 - Harvard Business Review
 - TED Talks
 - LinkedIn Learning

Motivating **NEEDS**

	Motivated By:	How to Connect:	Challenges:
High A	Independence, CONTROL , competition, OUTCOMES , individual recognition.	Bottom line, direct to the point. Outcomes, outcomes, outcomes.	They will argue with you. Everything is a chance to win.
Low A	Encouragement, reassurance, HARMONY , team environment.	Ask for their help based on their expertise, attitude. Considerate, supportive, encouraging dialogue.	Will say things are fine, when they aren't, especially when feeling confronted or responding to a harsh approach.
High B	Positive, personal, public praise. INCLUSION, SIGNS OF STATUS, ACCOMPLISHMENT.	Inclusion: share info, ask their opinion. Never criticize in public, build a relationship, recognition for how they do things with people.	Will get defensive, make excuses out of a desire to protect their image.
Low B	Recognition for technical accomplishments/expertise, time to think, FREEDOM FROM POLITICS.	Allow time to think, clear, factual communication, freedom from too much small talk, straightforward, analytical approach.	May not say much, engage in discussion, tell you how they are feeling, avoid focusing on the "people part."
High C	Paying attention to them. SECURITY, STABILITY , family-like work team, recognition for LOYALTY.	Scheduled: meetings, conversations, everything. Time to consider and reflect before deciding, lessen pressure, give full attention, be very specific on time frames, deadlines.	May be uncomfortable/resistant to changes in routine, schedule, comfort zone. Needs time to think, consider, get used to change.
Low C	VARIETY, CHANGE OF PACE , mobility, lots to do.	Brief, bulleted communication about the action/point, immediate feedback, load them up with a variety of challenges, pressure is productive.	Will interrupt, may not listen well. Can be tense and frustrated when change isn't fast enough for them.
High D	OPPORTUNITY TO GET THINGS RIGHT , structure, plan, SPECIFIC JOB KNOWLEDGE , freedom from risk, RECOGNITION FOR ACCURACY.	Written, precise expectations. Very specific and frequent feedback with examples; opportunities to develop subject-matter expertise, specialized training.	Very sensitive to criticism (they work hard to make NO mistakes.) Very hard on themselves for anything not done exactly "right."
Low D	FREEDOM FROM STRUCTURE , delegate details, give room to decide how, BIG PICTURE FOCUS.	Flexible, informal, casual interactions. Focused on big picture with strong clarity around "guard rails." Freedom from structure.	Thick-skinned, stubborn about their way. May not care very much about your rules, policies, procedures.
Logical	Being correct, ensuring the right decision, driven by data.	Logic, data, analysis, facts, evidence of why something will succeed.	Will slow down or stop when they don't have enough time, data, info to decide.
Intuitive	Deciding, using emotion, gut, experience and going for it.	Flexibility, use estimates, get 80% of what you need and go, consider their emotions.	Will decide, but sometimes wrong. Emotion can drive rash decisions.

POWERFUL QUESTIONS Topic Library

By asking powerful questions, the leader invites the employee to clarity, action, and discovery at a whole new level. They are generally open-ended questions that create greater possibility for expanded learning and fresh perspective. Below are some topics to get your questions started.

INVESTIGATIVE:

Share with me what is happening now.
Describe the results produced so far.
Tell me what's working; what's not.
Describe areas that are unclear for you.
Help me understand your vision for success.
Share what's most important for you.
Tell me what's top of mind.
Describe what's most critical.
Explain the roadblocks you're experiencing.

PRODUCTIVE:

Describe the desired outcome.
How can you get started?
What else do you need to take action?
Walk me through some options you could pursue.
Identify some milestones on the path.
Share what you'll do as a result of this conversation.
What's the timeline?
Share what roadblocks you're anticipating.
How will you know you've succeeded?

SUBJECTIVE:

Help me understand your view on this.
How do you really feel about...?
Describe what most excited you.
Share with me what you're most worried about.
Share with me what has you feeling frustrated.
Describe what you're most confident about.
Describe any hesitations you have.
Share what you'll take away from this.
How did [other person] react when you shared this with them?

SPECULATIVE:

I wonder how you might...

- ...capitalize on your experience?
- ...explore some other angles/perspectives?
- ...handle this another way?
- ...reframe this?

Describe what happens if this continues.
Describe what happens if nothing changes.
Share with me another possible point of view.
Explain the other possible options.

INTERPRETIVE:

Share what might happen if this doesn't work.
Describe the real issue here.
Share with me what led to that.
How might you look back on this in five years?
Share your assessment of the situation.
If you could do that over again, what would you do differently?

PI STRENGTHS:

Highest A

- How can you build on your natural desire for outcomes, to see success?
- How can you adapt to be more collaborative to get the outcomes you're looking for?

Highest B

- How can you use your natural ability to persuade and connect to help get you the outcomes you want?
- How would being a bit more reflective in your approach enhance your credibility with others?

Highest C

- How could you apply your thoughtful, persistent approach to get the outcome you want?
- What would help make you comfortable in speeding up how you take action in this area?

Highest D

- How could you leverage your desire to get things exactly right in this situation?
- What's the best way for you to get more comfortable in uncertain situations?

