



PARTICIPANT WORKBOOK

CHANGE MANAGEMENT

Driving Cultural Transformation
to Achieve 100% IFS Usage



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LEADERSHIP COMMITMENT

A large, empty rectangular box with a thin grey border, intended for a leadership commitment statement.

STAR PROGRESS UPDATE

A large, empty rectangular box with a thin grey border, intended for a star progress update.

Asking Powerful Questions

Asking the Right Questions to
Accelerate Performance and Insight

ACTIVITY



Why Should Leaders Ask Questions?

INSTRUCTIONS

What do you find **most challenging** about leadership?

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Who Did it Best?

INSTRUCTIONS

Think about a time when a person asked you really good questions.

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

What was **the impact** on you?

What about a time when a person **did not ask questions well**?

“As a leader, you don’t have answers – your workforce does. That completely changes how you have to lead. You have to unleash the creativity. Innovation isn’t happening because of a genius at the top.” -Jane Fraser | Citi CEO

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Benefits of Asking Questions

INSTRUCTIONS

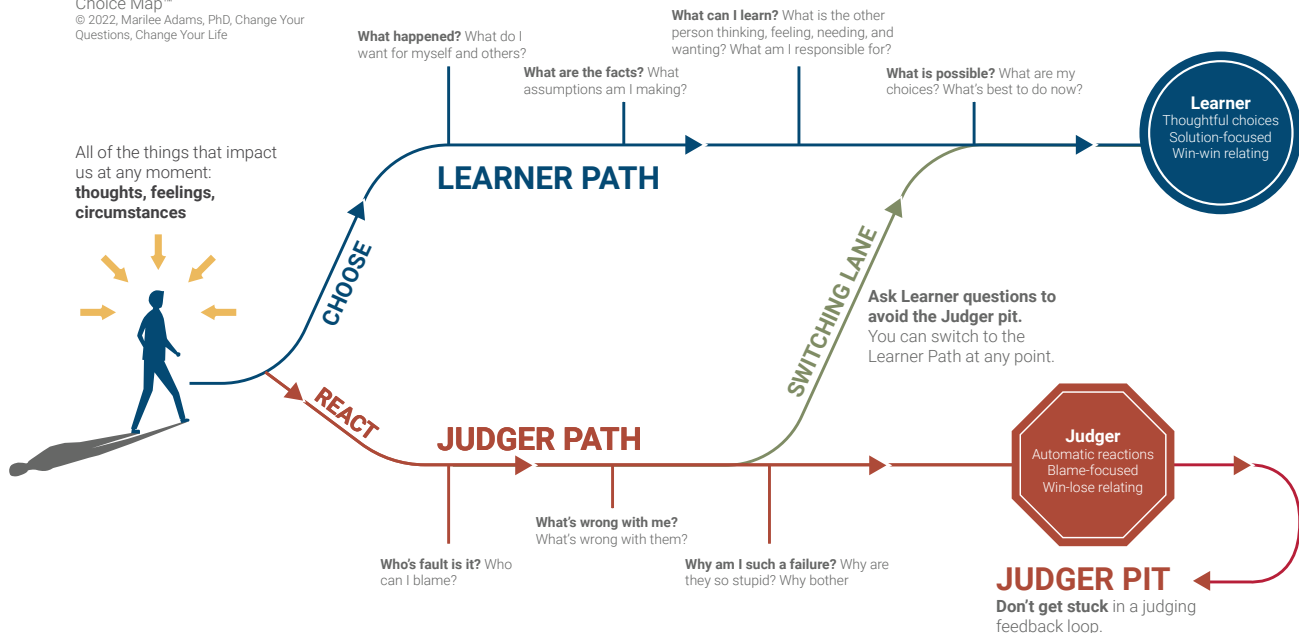
Describe the **benefits** of asking questions.

“Trust is the stacking and layering of small moments and reciprocal vulnerability over time.” -Brené Brown

Learner vs. Judger

It's YOUR CHOICE!

Choice Map™
© 2022, Marilee Adams, PhD, Change Your
Questions, Change Your Life



Addressing Your Mindset

Judger

- Close-minded, pessimistic
- Certain, critical, inflexible
- Dismissive or defensive
- Problem-focused
- Focuses on areas of disagreement
- Critical, blaming, guilt

Learner

- Open-minded, optimistic
- Curious, creative, flexible
- Collaborative, connective
- Possibility-focused
- Finds areas of agreement
- Understanding of others' perspectives
- Self-awareness of own impact

Change Your Questions, Change Your Life

Judger

- What's wrong with me/you?
- Whose fault is this?
- Why are they so stupid?
- How can I prove that I'm right?
- Why even bother?

Learner

- What's the goal?
- What is working?
- What are the facts/what can I learn?
- What role did I play in this?
- What are the options?
- What's possible?

Get Back to the Learner Path

Awareness – Am I a being a Judger or Learner right now? Is that what I want to feel or do?

Breathe – Do I need to take a step back, pause, and look at this situation more objectively?

Curiosity – Do I have all the facts? How else can I think about this? Am I open to hearing other perspectives **or** ideas?

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Judger vs. Learner Mode

INSTRUCTIONS

Think about a recent experience when **you were in Judger mode**. How did that go? What was the result?

And in Learner mode? What was different?

“We do not rise to the level of our expectations. We fall to the level of our training.” -Archilochus

Are Your Behaviors Getting in the Way?

LOWEST	FACTOR	HIGHEST
May shy away from challenging/difficult questions.	A Dominance	Desire to decide, provide direction, give answers, take over.
May not ask enough questions about emotional/feeling items.	B Extraversion	Desire to talk with not enough listening. May be overly focused on emotions.
Situational listening. May not be patient to ask enough questions.	C Patience	May not push and challenge person with their questions.
Too high-level, not thorough enough with questions.	D Formality	Ask too many questions to create personal comfort/pin down every detail.

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Behaviors - Reflection

INSTRUCTIONS

Reflect on the way your behaviors impact how you ask questions.

Pick one area you want to focus on going forward.

“When you ask a question, you invite a conversation.”

-Marilee Adams, PhD

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Let's Practice! Role Play 1

10 MINUTES

Pair up with a partner. Choose your role and read the practice scenario. Play out the role play for seven minutes. When finished, share feedback. We will instruct you when to stop so you can switch roles for round two!

Scenario 1

An employee has asked to talk about a day-to-day process that feels clunky or inefficient. They've been noticing small issues and think things could be improved, but they aren't sure what the best fix might be.

Recently, they shared this with you:

“I keep running into the same hiccups every week and I think there's probably a better way to do this — but I don't really know where to start. I'd love to hear your thoughts.”

They want to talk it through with you to get clarity on what could be improved and how they might take the lead on suggesting changes.

Leader Instructions:

- Use open-ended questions to help the employee explain what's not working well and what they've noticed so far.
- Stay curious about the bigger picture and the impact of any ideas they have.
- Use your questions to help guide them towards sharing suggestions and deciding on a next step.

Employee Instructions:

- Time to engage your acting skills! Pick a process you use at work and describe the situation to your Leader. Be clear about what's not working and why it's frustrating.
- Respond to your Leader's questions naturally.
- Be honest about what kind of support you'd like from your leader.

Types of Questions



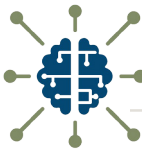
Investigative



Speculative



Interpretive



Productive



Subjective



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?)



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

I wonder how you might...?



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

How can you get started?



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

What happens if this continues?



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

How do you really feel about _____?



Judger vs. Learner Mode

10 MINUTES

Brainstorm 2-3 questions for each of the five categories. Write those down.

Identify one example situation/ scenario in which you might use each of the five question types.

Pick a spokesperson and prepare to report out your results.

	2-3 QUESTIONS	EXAMPLE SITUATION
INVESTIGATIVE 		
SPECULATIVE 		
PRODUCTIVE 		
INTERPRETIVE 		
SUBJECTIVE 		



Let's Practice! Role Play 2

10 MINUTES

Scenario 2

Your employee is a mid-level team member. You know them as someone who is conscientious and usually full of ideas. They have shown strong enthusiasm for their role and career path. But today's conversation feels different — they seem distracted and frustrated.

"I don't know what it is, but I just feel a bit stuck lately. I'm usually the first one to speak up in team meetings, and I really enjoy the creative process — or at least I used to.

In yesterday's team meeting, I noticed I could barely focus on what was being discussed. I know the team shared some good suggestions, but honestly, I don't even remember what they were. It just feels like the meetings are all the same now. I guess I'm not feeling as challenged as I used to be, and I'm not sure I'm growing much right now."

Leader Instructions:

- Ask questions using the five question types to help your employee open up more about what's really going on.
- Stay curious. Try to find out what they want or need to feel engaged again.
- Focus on helping your employee find their own insights or solutions.

Employee Instructions:

- Time to engage your acting skills! Be honest about how you might feel in this situation.
- Don't offer solutions right away—share what you're experiencing and what's making you feel stuck.
- Respond naturally to the Leader's questions.
- Be honest about what kind of support you'd like from your leader.

“Leaders who don’t listen will eventually be surrounded by people who have nothing to say.” -Andy Stanley

Powerful Listening

Factors that impact listening:

- Private planning/rehearsing response
- Prejudging
- Premature dismissing
- Selective listening

Tips:

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

Body Language Matters

Positive body language

- Open posture (lean in)
- Facial expressions
- Eye contact

Validate what they’re saying

- Summarize back to them
- Acknowledge the emotion
- Show empathy, encouragement

Be present

- Put away distractions
- Pause before responding
- Focus on the speaker

Seek to understand

- Curiosity & vulnerability
- Show interest in learning
- Only offer advice when someone asks for it!

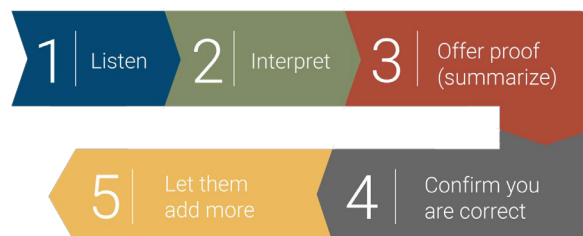
The Verbal Summary

“So, what I heard you say was...

What I think that means is...

Did I get that right?

Is there anything else?”





Let's Practice! Role Play 3

10 MINUTES

Scenario 3

An employee has asked for your perspective on a challenge they're facing while collaborating on a cross-functional project. They've been working closely with a colleague from another department — someone they don't know well and who is not part of your team.

Recently, the employee and their team put together a detailed idea to improve part of the project's workflow. During a team meeting, they presented their idea and asked for feedback. As soon as they finished presenting, the employee from the other department dismissed it with a quick comment, saying, "We don't need to consider that idea — it doesn't really fit the approach we're taking."

Your employee says this isn't the first time it's happened. In fact, they feel like this person always shuts things down without offering real feedback or alternatives. They've come to you looking for help — and possibly hoping you'll step in to speak to the other team member on their behalf.

They recently said to you, "I'm just tired of getting shut down. This keeps happening, and it's starting to affect the team's motivation. I feel like someone needs to say something. Could you talk to them?"

Leader Instructions:

- Ask questions using the five question types to help the employee talk through the situation, their perspective on what happened, and what they really want or need.
- Stay curious and neutral. Try to find out what they hope will happen next and what options they see. Use your listening skills and verbal summary to make them feel heard.
- Help guide their ideas to an appropriate next step without letting the responsibility of taking action fall on your shoulders.

Employee Instructions:

- Time to engage your acting skills! Be honest about how you might feel in this situation.
- Share what's on your mind (e.g.: your uncertainty, your desire to avoid conflict, and your concern for the team's work).
- Respond naturally to the leader's questions.



Getting Unstuck

What if you can get unstuck by asking a few questions well?

INSTRUCTIONS:

Brainstorm questions with your team for each situation. Write down 2-3 questions that you want to save for a future situation of your own.

Situation 1: You have a high performer you're not sure how to help improve and get to the next level.

NOTES:



Getting Unstuck

Situation 2: You have a direct report hesitant to make decisions or take action without certainty.

Situation 3: You have a direct report who wants to “put the monkey on your back” by identifying problems but not bringing solutions/actions.



Getting Unstuck

Situation 4: You have a direct report who may be feeling overwhelmed and isn't sure where to get started/what to prioritize.

Situation 5: You have a direct report who constantly complains about other (or certain) people.



Getting Unstuck

Situation 6: The team is stuck in a limiting mindset.

Situation 7: The team is reluctant to share ideas and feedback openly and candidly.



Situation in which you'll be asking questions:

- ☐ 1:1 Meeting
- ☐ Development Conversation
- ☐ Direct Report Coaching
- ☐ Performance Management Conversation
- ☐ Feedback Conversation
- ☐ Team Meeting
- ☐ Upper Management Meeting

Other:

Who will be involved?

Describe the situation – what goal are you trying to achieve?

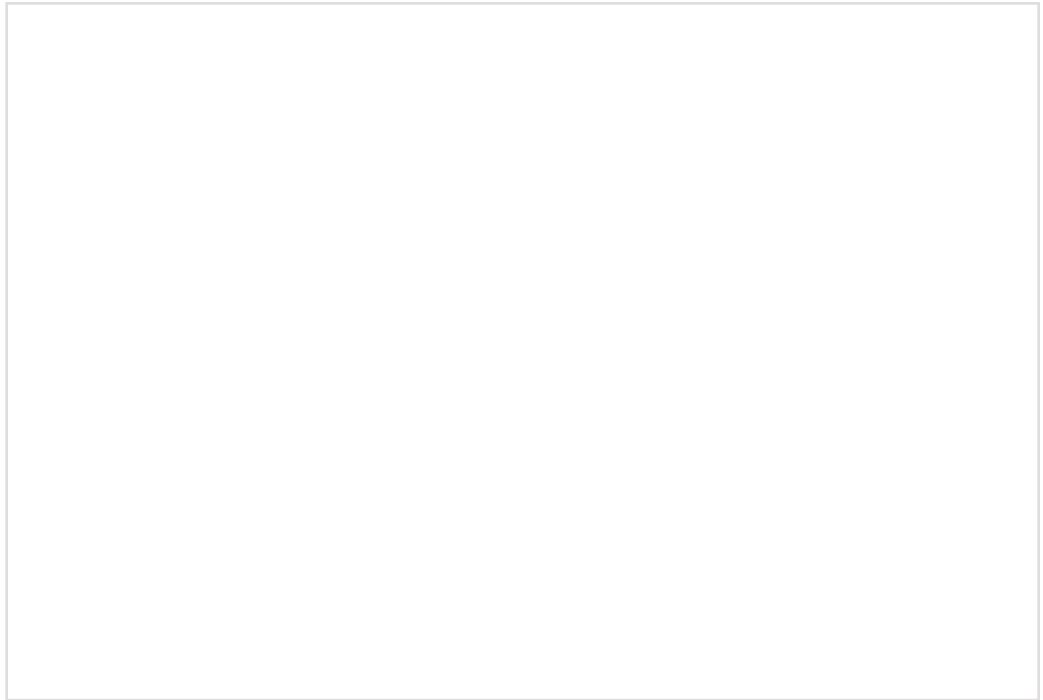
Questions to ask: (refer to your Questions Library)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

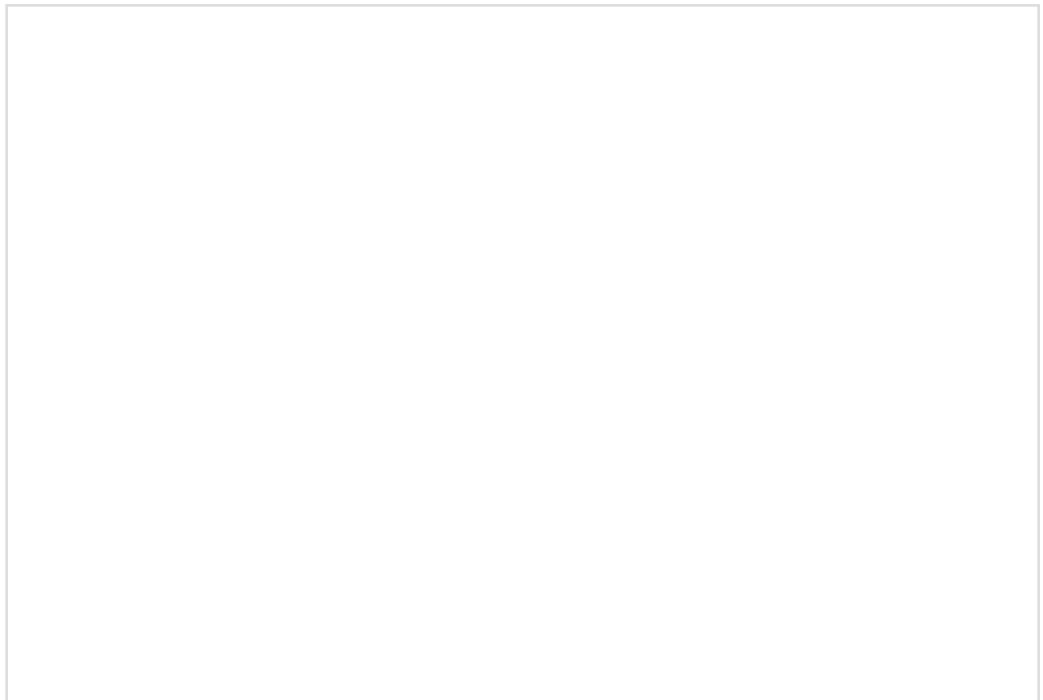
Keystone Habits

Driving Cultural Transformation
to Achieve 100% IFS Usage

Safety



Keystone Habit



Why Keystone Habits Matter for Leaders

Individual Impact

- Create automatic success patterns
- Reduce decision fatigue
- Build consistency under pressure

Organizational Impact

- Establish cultural norms
- Drive systematic improvement
- Create competitive advantages
- Build resilient, adaptive teams

“Keystone habits start a process that, over time, transforms everything.”

Charles Duhigg, “The Power of Habit: Why We Do What We Do in Life and Business”

A keystone habit is a foundational behavior that, once established, naturally leads to improvements in other areas of your life without requiring direct effort on those other habits.

What is a Keystone Habit?

Key Characteristics

- A single habit that triggers widespread positive change
- Creates momentum for other beneficial behaviors
- Establishes cultures of excellence
- Generates compound returns on investment

Key Take-Aways

- Singular behavior
- Catalyst to transform the culture of an organization
- Serves to drive ripple effects toward desired outcome

Impact of Keystone Habits

Daily Gemba Walks

- R: Encourages empirical problem-solving and voicing of concerns proactively
- T: Reinforces respect for people and frontline expertise
- T: Active engagement of leadership

Standardized Work Reviews

- R: Drives performance, quality improvements, safer workflows, & cost reductions
- T: Empowers people to suggest improvements and adhere to standards

Kaizen Events

- R: Triggers incremental performance gains
- T: Creates proactive mindset and idea-sharing
- T: Fosters mutual trust and shared commitment to waste elimination

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Building Keystone Habits

INSTRUCTIONS

1. Discuss what Keystone Habit(s) are most impactful for your group.
2. Identify the results and the transformational behaviors it creates.
3. Be prepared to share!

Group Work Plan

Group Work Plan

- Current state
- Future state
- Keystone Habit
- Actions and Scorecard
- Ripple Effects: Impact on OTS performance and culture
- Present to the group

NOTES

Alcoa Keystone Habit Impact

Metric	Pre-O'Neill (1986)	5-Years (1992)	Delta '86-'92	10-Years (1997)	Delta '86-'97
Safety Lost Days/100 workers	1.86	~0.81	-56%	~0.25	-87%
Revenue	\$4.9B	\$9.0B	+84%	\$13.3B	+171%
Productivity Revenue per Employee	\$84.5K	\$149.2K	+77%	\$163.2K	+93% Sustained gains from safety-driven uptime and process refinements
Employee Retention	High Turnover	Moderate Improvement	Safety Gains Boosting Morale	Strong Retention Gains	Via Trust-Building
Employee Engagement	Low Engagement Multiple Strikes	Rising Engagement Fewer Disputes	Reduced strikes Near-zero major safety incidents post-1990	High Engagement Minimal labor unrest	Major reduction Strikes dropped to near-zero; focus on shared safety goals fostered collaboration
Net Income	\$254M	-1.1B	-534% !! Initial dip due to restructuring	\$805M	+217% Quintupling trajectory by end of tenure

Pre-O'Neill

Business Conditions

- Strong technical expertise
- Siloed operations
- Overcapacity and outdated facilities
- Lacking in adaptive leadership
- Poor operational discipline
- Intense global competition
- Distrustful management-labor relations
- Stagnant stock price
- One of the most dangerous industries in America

Cultural Norms

- General complacency and lack of ownership
- Bureaucratic and resistant to change
- Accepted injuries as the "cost of doing business"
- Workers took pride in handling dangerous situations
- "Danger is like a rite of passage."
- "Burns, cuts, smashed fingers just come with the territory."
- Split standards
- "Safety procedures I follow vs. those I think aren't important."



IFS Conditions & Norms

INSTRUCTIONS

1. In your groups, describe the current conditions and cultural norms around IFS utilization.



O'Neill's Bold Step

Existing Cultural Norms:

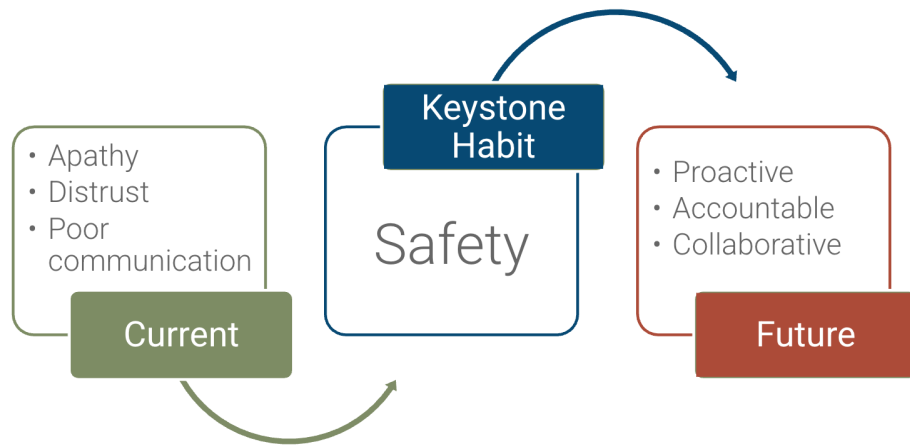
- Productivity necessitated danger
- Accidents and injuries were the price people had to pay for attaining certain goals.

The Goal: Zero Injuries

Safety as a Driver of Operational Excellence

- Requires a comprehensive understanding of manufacturing processes.
- Better process understanding would lead to more productive plants.

Alcoa's Path



O'Neill's Desired Future State

Safety results in efficiencies, improved quality, and innovation	Leadership are held accountable for safe, productive teams	Coordination and communication between departments is standard operating procedure	Workers volunteer ideas for improvement and report issues without fear
Everyone looks out for their own safety and those they work with	Every worker expects to go home in the same condition they left	Incidents and fatalities are viewed as names, not numbers	If we need to "be careful," it means there is a safety issue to be solved



Future State and Cultural Norms

INSTRUCTIONS

1. Describe the desired future state and cultural norms to achieve 100% IFS utilization.

O'Neill's Challenge

Attitudes:

- Pride in the dangerous nature of the work
- Lack of confidence in managers and workers
- Already best in aluminum industry

Behaviors:

- Productivity was king
- Employees fearful to voice concerns

Processes:

- Quick fix vs. lasting solutions

Accountability:

- ***Tying Keystone Habit safety to business metrics***

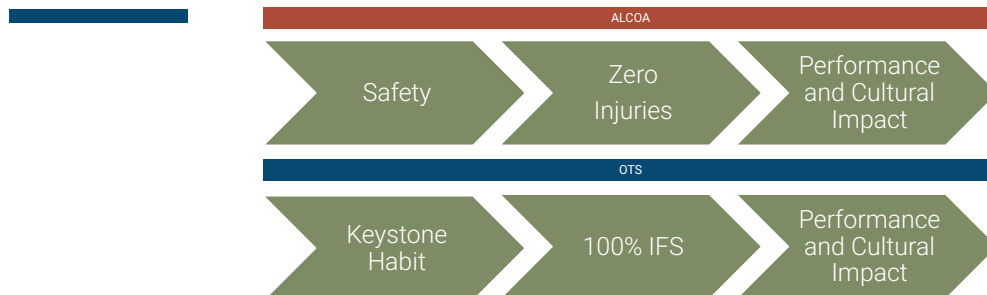


Challenges & Transformation

INSTRUCTIONS

1. In your groups: Identify the challenges you face and the transformation required: behaviors, processes, attitudes, language, and accountability.

Thought Model

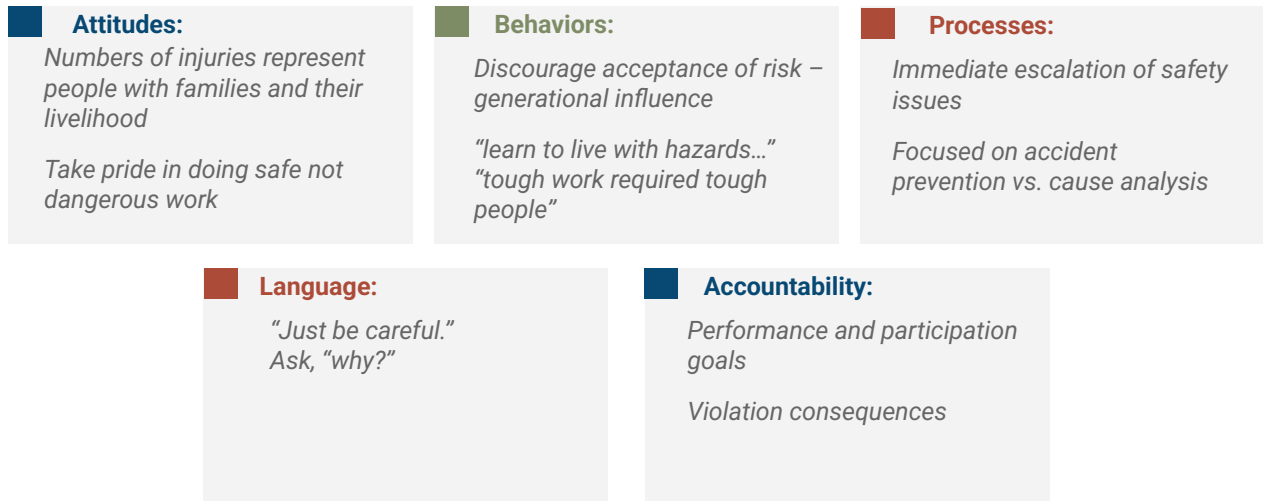


Power of O'Neill's Keystone Habit

To truly **improve safety**, an organization must:

- **Understand every process:** *Deep analysis reveals efficiency opportunities.*
- **Improve communication** *Realtime information flow enhances all operations.*
- **Build accountability:** *Clear responsibility improves execution everywhere.*
- **Focus on prevention:** *Proactive thinking becomes embedded.*
- **Engage everyone:** *Safety is personally relevant to all employees.*

Keystone Habit Implementation



Alcoa's Scoreboard

Attitude:

- Public declaration as top priority

Process:

- 24-hour incident reporting rule
- Integration of safety tools & tracking
- Regular safety evaluations (Kaisen events)

Behavior:

- Employee hotline direct to CEO
- Prioritizing safety tasks over speed

Accountability:

- Zero-injury performance goal
- Post-incident leadership accountability sessions

Alcoa's Keystone Habit: Safety

Safety was Alcoa's lever for holistic change:

- Addressed immediate risks
- Unlocked productivity, profitability, and ethical culture

Alcoa became a safer, more agile and competitive company by focusing on its people.

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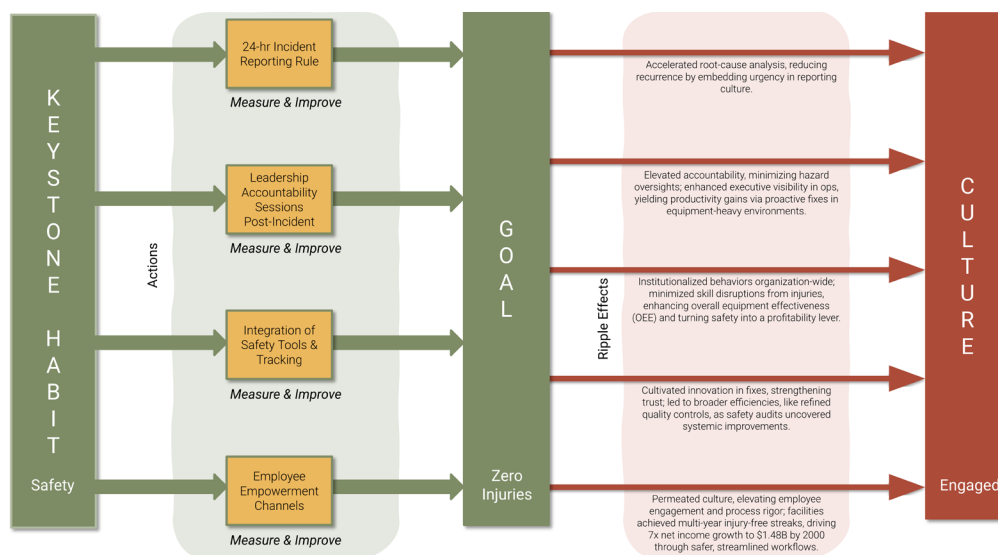


Building Keystone Habits

INSTRUCTIONS

1. In your groups, what keystone habit will help you drive the adoption of IFS and what is your scoreboard (actions & metrics)?

Keystone Habit Implementation



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Outcomes & Ripple Effects

INSTRUCTIONS

1. List the expected outcomes and ripple effects.
2. Prepare to share your total findings with the group.

Messaging

Messaging:

- Frames perception
- Focuses on positive outcomes and impact
- Visionary
- Addresses audience challenges
- Integral part of every decision
- Repeated often

Formulate Your Message

What does success look like?

"I intend to make Alcoa the safest company in America."

Customer: How does success benefit the customer?

Business: What does success mean to the business?

Organization: What does the organization realize with success?

Team: How does it impact your team – expectations & success?

Individual: What will the individual gain and at what cost?

"Every year, numerous Alcoa workers are injured so badly that they miss a day of work. **Our workers should expect to return home in the same condition they left.**"

PI Design for Project Teams

Maximizing Strengths and Opportunities



Using the PI Software

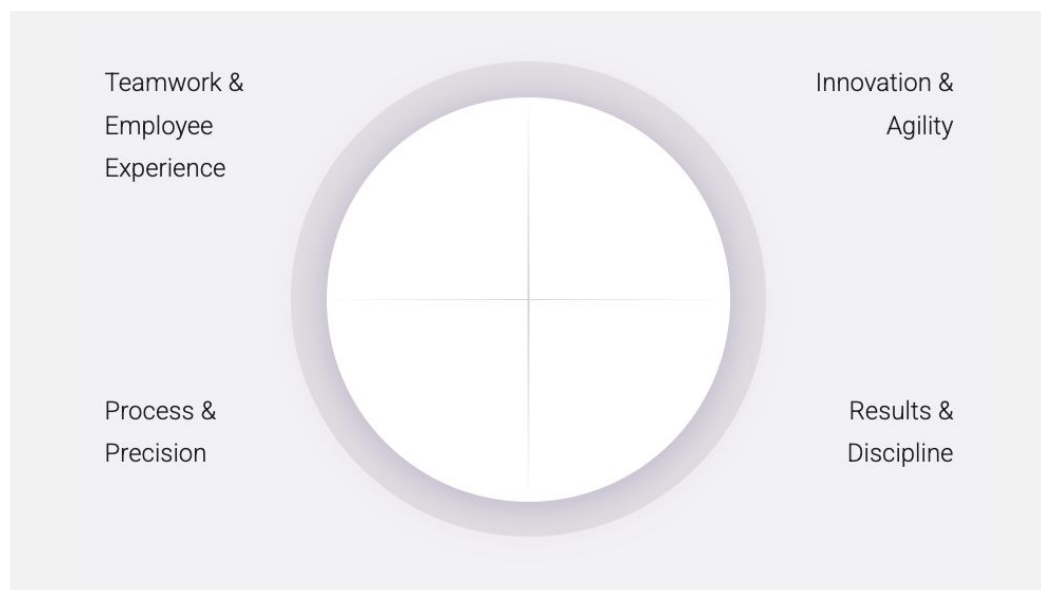
INSTRUCTIONS

Log in to the PI Software.

Create your project team in Design.

Review your strengths and caution areas of your team type.

Identify 1-2 that resonate most.





Your Team Type

INSTRUCTIONS

Review the Recommendations and Action Planner.

Brainstorm your action plan. Your action plan is the SINGLE item/area that would have the biggest impact on the effectiveness of this team working together.

1. What action you will take
2. Who, what, when, where, how
3. Timeline
4. How you will hold yourself accountable
5. Success is _____.

Prepare to report out and share your recommended action and all details with the larger group.



Design for Strategic Action

INSTRUCTIONS

In your groups:

1. Discuss the 3-4 activities you need to do to achieve success on your project team.
2. Select the correlating objectives in the Design software.
3. Review your Strategy Type.



Action Planning

INSTRUCTIONS

Review the strengths and challenges presented in the software.

Review the Recommendations and Action Planner.

Brainstorm your action plan. Your action plan is the SINGLE item/area that would have the biggest impact on the effectiveness of this team working together.

1. What action you will take
2. Who, what, when, where, how
3. Timeline
4. How you will hold yourself accountable
5. Success is _____.

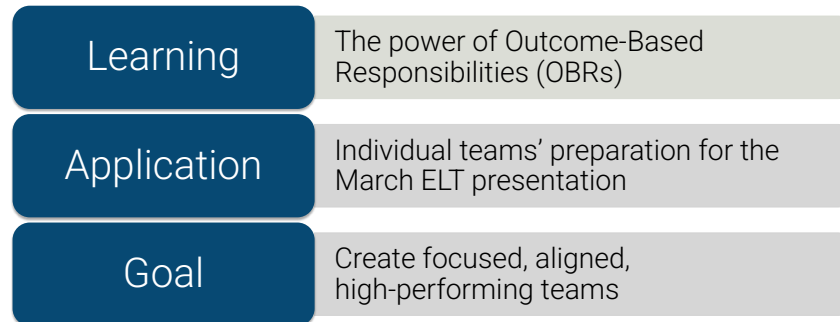
Prepare to report out and share your recommended action and all details with the larger group.

Moving from Completing Tasks to Achieving Outcomes

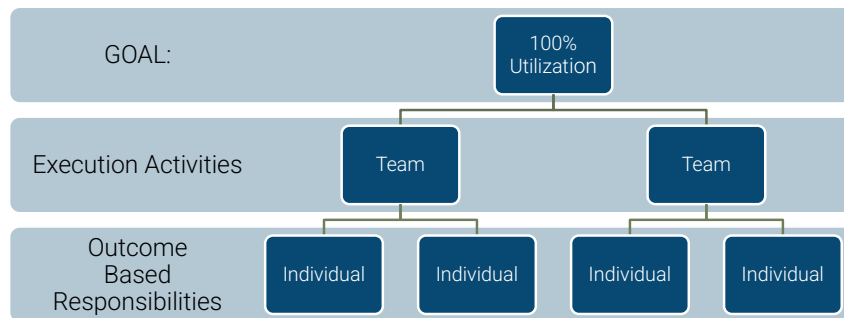
Creating High-Impact Teams

The path to success is never as clear as the goal.

Objective



IFS Project



High Performance Criteria



Clarity



Expectation



Behavior

What are Outcome-Based Responsibilities?

Traditional Role Definition:

- Job title + list of tasks
- “What you do” focus
- Activity-based accountability

Outcome-Based Responsibility

- Clear deliverable & measurable success
- “What you achieve” focus
- Results-based accountability

People own outcomes, not activities

OBR Example:

	Military	Decathlon
Task	Policing your area	Creating and delivering the Decathlon program
Outcome-Based Responsibility	Maintain Self & Area to Defined Standards	Develop Decathletes with deep self-awareness and emotional intelligence, integrated into their application of core GD Bench Strength Skills, demonstrated in their ability to create an environment that fosters: • High performance • Mutual trust, and • Effective communications
Goal	Pass Inspection	Drive Business Impact & Results

The 4 Core Framework Questions

Every role must answer:

WHAT: The Outcome

WHY: Connection to team goal

HOW: Success criteria

WHO: Role fit

Identifying Drivers

Drivers are the categories of work that concentrate team efforts to achieve the goal.

What's the ultimate deliverable that demonstrates success?

A compelling proposal presentation

What must that presentation accomplish?

Inform, persuade, address risk, implementation roadmap

What building blocks must exist before we can present?

Current/Future State, stakeholder needs analysis, change management plan, risk analysis, communication strategy, implementation timeline, etc.

What support functions keep the team on track?

Project coordination, communication, documentation, quality control

Driver Discovery

Categories	Core Question	Key Outcome Types
Strategic	What direction must we set?	Vision, strategy, stakeholder alignment
Technical	What must be designed/built?	Requirements, specifications, solutions
Analytical	What must we understand/prove?	Data analysis, ROI, risk assessment
Operational	How do we execute day-to-day?	Plans, processes, coordination
Communication	What must stakeholders know?	Messages, presentations, documentation
Quality	How do we ensure excellence?	Reviews, standards, compliance
Change Management	How do we enable adoption?	Training, support, transition plans

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IFS High Performance Team Design

TEAM GOAL

"Deliver a winning, persuasive, and impactful presentation to the ELT."

Describe 5-7 Drivers required to accomplish the team goal using the four questions on the previous page to help you.

Then define the key outcome – or measure of success – that the Driver must accomplish to ensure the team goal is achieved.

EXAMPLE:

Driver: Site interviews and data collection

Key Outcome: Identify root causes of IFS adoption resistance and synthesize data to identify issue priority.

USE HANDOUT TO COMPLETE EXERCISE

Identify Outcome-Based Responsibilities

Defining the OBRs

Outcome-Based Responsibilities

- ✓ Related to adding value vs. tasks
- ✓ Assure success of the outcome
- ✓ Measure objective results
- ✓ Typically 2-4 for each Driver

OBRs should be defined in such a way that it is obvious that someone is delivering on them

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Example OBRs

Team Goal:

Driver:

Key Outcome:

Outcome-based Responsibilities (2-4 deliverables)

1.

2.

3.

4.

Values -> Cultural Behaviors

Pride in Work

"Give your best everyday"

"We hold each other to high standards and support quality work"

Accountability

"Do what you say you will with a personal commitment to the end result"

"We take full responsibility for our outcomes without blame or excuses"

Innovation

"Strive for a better way every day"

Collaboration/Communication

"Fully engaged and participating with the team communicating expectations clearly"

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Cultural Standards

INSTRUCTIONS

1. For the values: Trust, Honesty, Alignment, and Transparency, describe the behaviors that illustrate what these look like lived out for your team. Use the handout to complete this exercise. Be prepared to share.

Matching People to Roles

Three-Factor Fit Assessment

Best role fit requires examining: Weighting

Behavioral Strengths (PI Assessment) 40%

Experience & Skill Set (Track record) 40%

Development Opportunity (Growth goals) 20%

PI Factor Mapping

Drivers	Primary Factor	Secondary Factor	Rationale
Stakeholder Analysis	Moderate B (Extraversion)	Moderate D (Formality)	Requires relationship-building and social comfort, plus structured documentation
Technical Requirements	High D (Formality)	Moderate C (Patience)	Demands precision, analytical rigor, and thoroughness
Business Case/ROI	High D (Formality)	Moderate A (Dominance)	Requires analytical precision and confidence in presenting data
Implementation Roadmap	Balanced C-D	Moderate A (Dominance)	Needs methodical planning with attention to detail and results focus
Change Management	High B (Extraversion)	Moderate C (Patience)	Requires people engagement and sensitivity to adoption pace
Proposal Development	High A (Dominance)	High B (Extraversion)	Needs assertive messaging and persuasive communication
Project Coordination	Balanced C-D	Low A (Dominance)	Requires process consistency without being domineering

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Factor Mapping

On your handout, identify the Primary & Secondary factors for each Driver. Be prepared to share.



Role Fit Self-Assessment

INSTRUCTIONS

Complete your self-assessment, then share with your group and assign leads for each Driver. Be prepared to share.

Driver	PI Behavioral Fit	Experience/Skills	Interest/Growth	Total Score

NOTES



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:

