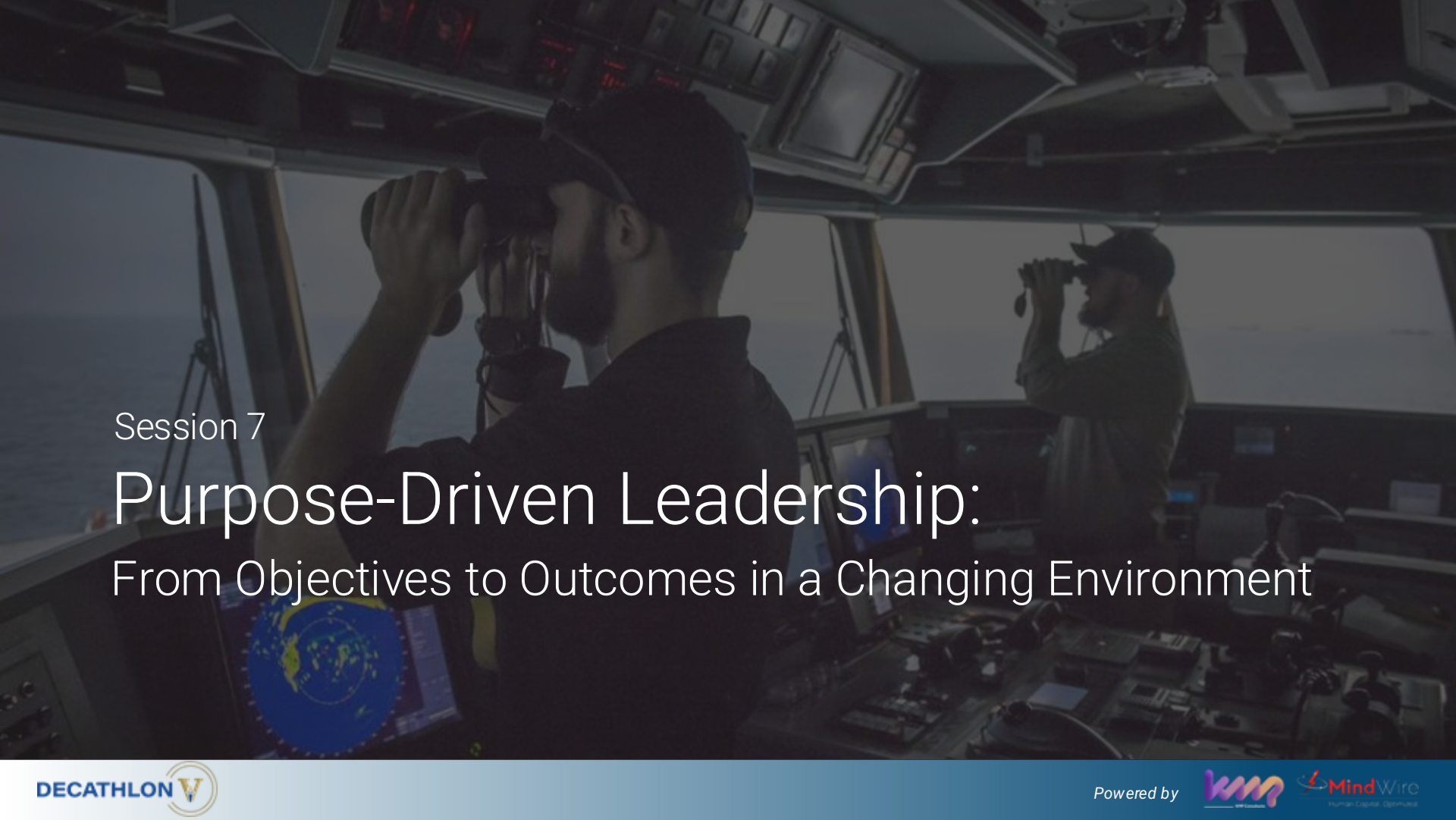




Session 7

Purpose-Driven Leadership:

From Objectives to Outcomes in a Changing Environment

Session 7 at a Glance

Why This Matters — Motivation and the Retention Connection

The Performance Snapshot — Concepts and Principles

Copilot Setup — Start Your AI Chats

Practice Snapshots — Live Facilitation Exercise

Building Better OBRs — AI-Assisted OBR Creation

Putting it All Together — AI, Retention, and Change Management

Why This Matters

Most leaders dread performance reviews.

Most team members dread them even more.

The Performance Snapshot is built on a different premise.

When It Goes Wrong

Marcus has been on the team for 11 months.

His manager David is busy. The annual review is due Friday. David glances at the rating scale, recalls a few recent moments, and assigns scores. He writes two generic development areas from a form dropdown.

On Thursday, David reads through the scores. Marcus nods. The meeting ends in 12 minutes.

Six months later, Marcus leaves — citing “no growth opportunity.”

What Went Wrong

Form, Not Conversation

- David completed a rating form — not a development conversation
- Preparation took 10 minutes; Marcus' trust took years to erode
- No behavioral observations, just recalled impressions

Generic Development

- Development areas picked from a dropdown, not observed behavior
- “Communication” and “Initiative” — could apply to anyone
- No connection to role outcomes or team goals

No Peer Voice

- Marcus's teammates had no input into the conversation
- Marcus himself had no voice — he just nodded and signed
- One-way verdict disguised as a conversation

Zero Accountability

- No specific actions, no completion dates
- No manager support commitment or follow-up plan
- Nothing changed — because nothing was asked to change

When it is Done Right

Tuesday, 2pm. Elena's Performance Snapshot

- Teammates share specific behavioral observations. Elena listens, then speaks last on strengths.
- For development, she goes first: "I avoid conflict in meetings. I want to change that."
- The culture conversation shifts the room — peers name specific ETHOS behaviors. Elena names her own growth area before anyone else could.

Three months later, she turns down a recruiter without a second thought.

What Made the Difference

Culture Was Explicit

- ETHOS behaviors named and grounded in real examples
- Culture discussed with the same rigor as outcomes
- Elena owned her cultural growth area — Alignment

Specific and Dated

- Actions had exact completion dates
- Manager committed specific support
- Check-in dates set before leaving the room

Individual Owned It

- Elena spoke first on development areas
- She chose her own commitments with dates
- Growth was self-driven, not manager-assigned

Preparation Was Visible

- Sarah used Copilot as her facilitation partner
- Preparation communicated Elena's growth was worth investing in
- Connected development to STAR® Manager concepts

The Retention Connection

Seen

- Peers name specific strengths — not just the manager
- The individual hears their impact from the people who work alongside them
- Validation from peers is qualitatively different from a manager's assessment

Developed

- Self-chosen commitments with specific completion dates
- Growth owned by the individual, not assigned by the manager
- Manager commits specific support and check-in rhythm

Matters

- OBRs connect individual behavior to the team's success
- Personal Impact - every person sees how their results move the numbers that matter
- Effort is tied to organizational value — explicit and personal

The Performance Snapshot

Three Core Areas

Area 1: Critical Metric Performance

- Personal contribution to the team's Critical Metric
- **Observed, not judged** — it is what it is at that snapshot in time
- **One forward-looking question only** — no debate; listen and record

Area 2: OBRs

- **3–5 pre-agreed outcomes** — not job duties, but deliverable results
- **Connect individual performance to organizational value creation**
- **No surprises** - if OBRs are clear from day one

Area 3: Cultural Fit and Contribution

- **Alignment with ETHOS values**
- **Observable behaviors** — not recited slogans
- **Rated 0 | 1 | 2:**
Not demonstrating |
Demonstrating |
Actively helping others live it

Four Pillars of an Excellent Snapshot

Safety First

- No one develops in an unsafe environment
- Set norms before the first word of feedback
- Intervene immediately if the tone shifts

Preparation Is a Message

- OBRs reviewed, behavioral observations ready
- Communicates: “I take your growth seriously”
- Use Copilot for pre-session setup

Specificity is Respect

- Vague praise is forgettable; vague feedback is useless
- Observable actions with real dates show growth matters
- Always ask: “Give me a specific example”

Culture Is Not a Sidebar

- One of three core evaluation areas
- Tied to ETHOS values with observable behaviors
- A team that never talks about culture slowly drifts from it

Setup & Training

Set up your Copilot chats

Learn the Performance Snapshot process

Practice it live with your team

Copilot Chat Setup

Tool A — OBR Generator

- Open Copilot and start a new chat
- Paste the Appendix B prompt as your first message
- The AI is now configured — proceed with your request
- Start a new chat each time you use this tool

Tool B — Snapshot Coach

- Open Copilot and start a new chat
- Paste the Appendix C prompt as your first message
- Open a new chat for each person you snapshot
- Use the OBR Handoff Block to connect both tools

How the Snapshot Works

Phase 1: **Setup:** Confirm who, their OBRs, and KPI context

Phase 1.5: **Critical Metric:** Share plan vs. actual data; one forward-looking question only

Phase 2: **OBR Review:** Confirm shared understanding before feedback

Phase 3: **Strengths:** Team speaks first, individual speaks last

Phase 4: **Development:** Individual speaks first, team adds after

Phase 5: **Scoring:** OBRs: Individual first, team next, manager last (1–10)

Phase 6: **Culture / ETHOS:** Observable ETHOS behaviors;
rated 0 (not demonstrating), 1 (demonstrating), 2 (actively helping others live it)

Phase 7: **Summary:** Individual chooses 1–2 owned actions with dates

Practice Performance Snapshots

Practice Performance Snapshots



ACTIVITY — (~60 minutes)

- Work in your existing 3–4 person IFS project teams
- Each person takes a turn as facilitator — run a 15-minute Performance Snapshot using Copilot
- Use your OBRs from Session 3 (IFS Phase 1) — enter them directly into Copilot

3 rounds × 15 minutes = ~45–60 minutes

Debrief: Performance Snapshots



ACTIVITY

Group Sharing (~10–15 minutes)

- Focus on what you learned about facilitating — not on any individual's content

Discussion Questions:

- What surprised you about the self-assessment step?
- Where did you struggle as a facilitator?
- How did Copilot help keep the conversation on track?

Building Better OBRs

Outcome-focused language transforms how leaders define success.
Learn the OBR framework and practice building OBRs with Copilot.

Activity Language vs. Outcome Language

Activity-Focused (Weak)

- “Conduct monthly safety walks.”
- “Hold weekly team meetings.”
- “Submit monthly reports on time.”

What you DO — not what success looks like

Outcome-Focused (Strong)

- “Achieve zero recordable incidents per quarter.”
- “Improve team engagement scores by 15% within 6 months.”
- “Reduce reporting errors to <2% per quarter.”

Tip: Add “so that” to any activity.
The completion is usually the real OBR.

Enabler/Key Activity

An **Enabler/Key Activity** is a **category of strategic work** that a role is accountable for. It is the organizing label for a domain of responsibility — the strategic area someone *owns*.

Enabler / Key Activity	OBR (Outcome Based Responsibility)
<i>The domain you own</i>	<i>What success looks like within that domain</i>
Safety & Compliance	"Achieve zero recordable incidents per quarter, reducing direct and indirect safety costs by x%."
Supply Chain Reliability	"Reduce supplier-caused schedule delays to under 2% of program milestones per quarter."
Program Execution	"Deliver 100% of contracted program milestones on schedule with zero critical path deviations per quarter."

Create OBRs for IFS Phase 2



ACTIVITY — (~30 minutes)

- Use Copilot's OBR Generator to create OBRs for IFS Phase 2
- The AI guides you through outcome-focused language, KPI selection, and team-level connections
- Compare the manual Phase 1 OBRs with the AI-assisted Phase 2 OBRs — notice the difference
- Finish with a completed OBR Handoff Block — ready for your next Performance Snapshot

Debrief and Share OBRs



Group Sharing (~30 minutes)

- Share your newly created OBRs with the group
- Highlight strong outcome language — surface activity language disguised as outcomes
- Reinforce: well-written OBRs make Performance Snapshot conversations more effective
- Compare Phase 1 (manual) vs. Phase 2 (AI-assisted) — what improved?

Putting It All Together

Copilot: Strengths & Limits

What Copilot Does Well

- **Walks through all phases** in sequence — prevents skipping steps
- **Corrects activity-language** and shifts it to outcome-language
- **Surfaces rating gaps** and prompts exploration before judgment
- **Generates consistent written summaries** as development records
- **Scaffolds first-time managers** through the conversation structure

Irreplaceable Human Value

- **Reading the room** — managing energy, tangents, and group dynamics live
- **Emotional temperature** — addressing defensiveness or distress in real time
- **Performance data** — all metrics, OBR history, etc. must come from you
- **Cultural nuance** — team history, relationship context, and organizational norms
- **Authentic behavioral stories** — AI prompts for them but cannot verify them

The Retention Bottom Line

Why People Leave

- They don't feel seen — manager doesn't know how they show up
- They don't feel developed — nothing here helps them grow
- They don't believe their work matters — no connection to value

The Performance Snapshot addresses all three in a single conversation.

OBRs as Change Enablers

- Define what success looks like before the work begins
- Performance Snapshots create the accountability rhythm that sustains change
- Connect individual behavior to organizational value — the foundation of change that sticks

This is not performance administration. It is one of the most powerful retention levers a leader has.

OBRs & Performance Snapshots Drive Change

Change fails when expectations are unclear.

- OBRs define success before the work begins, removing ambiguity from the start.

Sustained change requires accountability rhythm.

- Quarterly Performance Snapshots create a structured checkpoint that prevents drift.

Resistance decreases when people understand why their work matters.

- Connecting individual OBRs to the team's Critical Metric makes change personal.

Self-assessment drives ownership.

- When people rate themselves first, they engage with change rather than having it imposed on them.

Peer feedback builds collective buy-in.

- When the team speaks, change is no longer a manager's initiative; it belongs to the group.

Culture alignment reinforces change.

- ETHOS-based culture conversations ensure behavioral change accompanies process change.

Lead the Conversation that Develops Someone.

Your standard is not to complete the form. It is to lead a conversation that actually develops someone.

A photograph of two men in a ship's bridge, both wearing caps and looking through binoculars. The man in the foreground is in profile, wearing a dark cap and a dark shirt. The man in the background is also in profile, wearing a light-colored shirt and a dark cap. They are standing in front of a large window that looks out onto the ocean. The bridge is filled with various electronic equipment, including monitors and control panels. The overall tone of the image is professional and focused.

Leading Change that Sticks

A People-Centered Approach to Organizational Transformation

Agenda

- Introductions and Expectations
- Tackling Change Fatigue
- Your Role as a Leader
- The Emotional Change Journey
- 5-Step Model for Individual Change
- Powerful Questions for Identifying Bottlenecks
- Using PI Data to Motivate Your Team

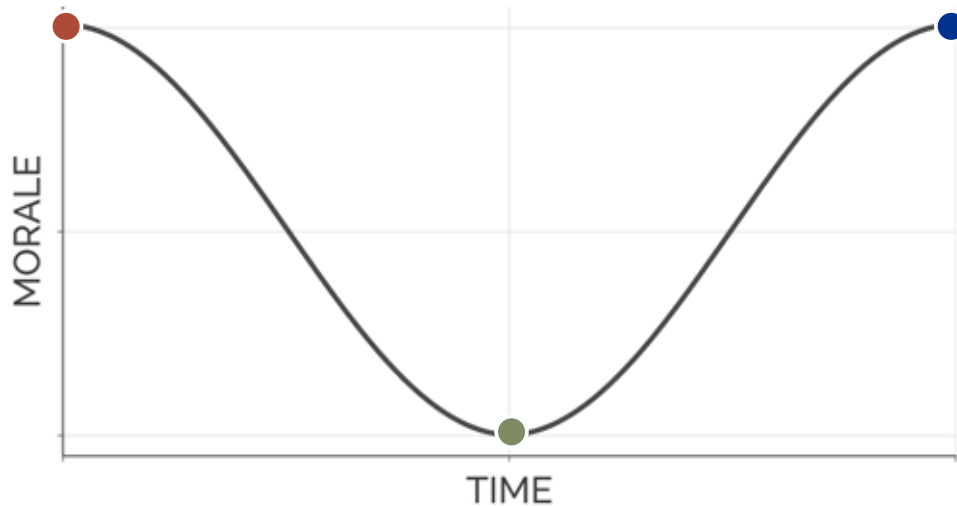
Change is Hard | Bridges' Transition Model

Ending, Losing, Letting Go:

Optimism. Energy.
Confidence in what's ahead.

New Beginning:

Clarity. Alignment. Renewed
commitment and momentum.



Neutral Zone:

Uncertainty. Fatigue. Doubt
and emotional dip.

"It isn't the changes that do
you in, it's the transitions."

William Bridges
Managing Transitions

"In times of change, emotion
will trump rational, logical
thinking almost every time."

John McGuire
Center for Creative Leadership

Change is a Reality

- Lots of people have change fatigue.
- Complaining won't fix change.
- Change management is a critical leader skill set, not an event.
- Good news - you can learn this.



*Cows run away from the storm while the buffalo charges toward it — and gets through it quicker. Whenever I'm confronted with a tough challenge, I do not prolong the torment. **I become the buffalo.***

Wilma Mankiller, first female Principal Chief of the Cherokee Nation



So, What is Change Management?



Definition: the structured approach to transitioning individuals, teams, and organizations from a current state to a desired future state

Scope for this class:
Team-level change (not organizational)

Why? It's in your control.

You can take immediate action. You don't have to wait for other decision makers. You don't have to wait for your org to suddenly become perfect.



Best and Worst



Think about a time you experienced a change at work that **did not go well**.

- *What went wrong?*

Now think about a change that **did go well**.

- *What made it successful?*



Change Effort Statistics

The Data: What Research Tells Us

30 %

of change management initiatives are **successful**.

The most common reason change efforts **fail** is:

Lack of active and visible support from people managers

Projects with **strong, visible support from middle managers** are

6x

more likely to succeed than those without it.

What percentage of employees said their **manager was a good communicator** during change?

38 %

McKinsey Quarterly (2015). Why transformations fail.

Leader Involvement Matters

When leaders **don't support** change effectively:

- Employee resistance increases
- Morale and engagement decline
- Turnover rises
- Change fatigue grows

When leaders **support** change effectively:

- Faster adoption
- Higher morale and engagement
- Sustained results



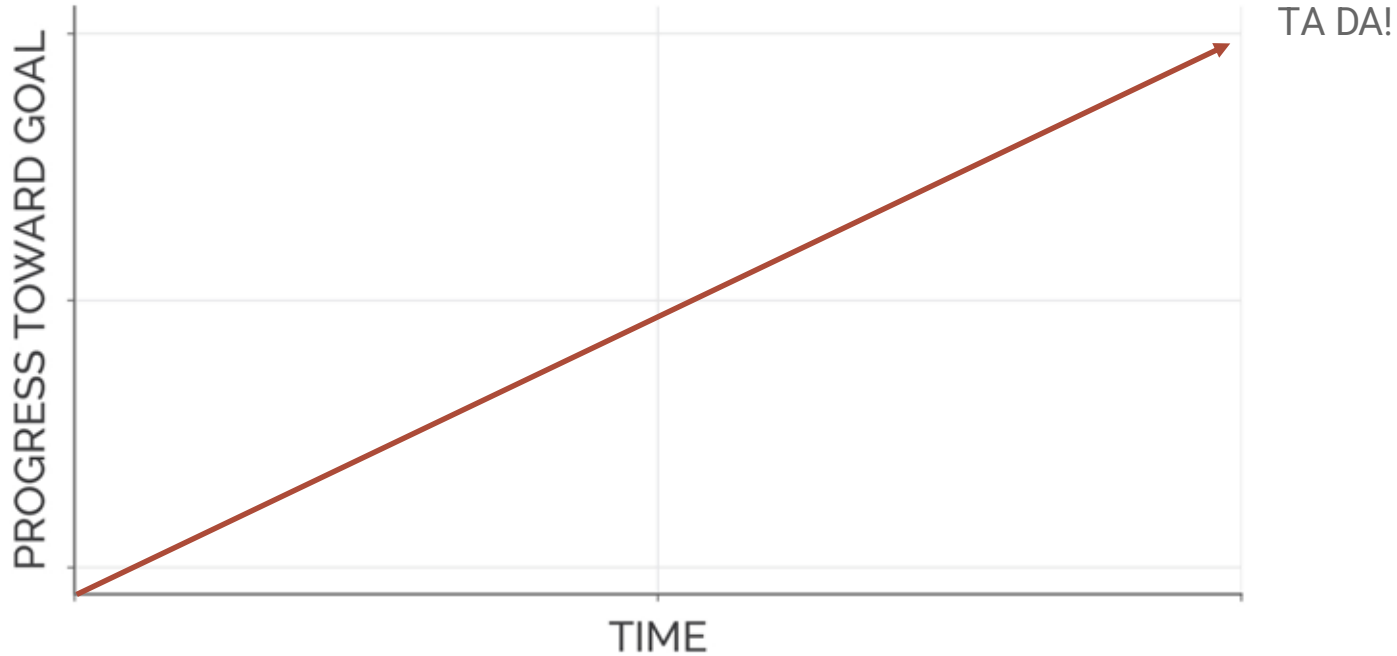
You're not just a *part of the change*,
you're the **key element** to success.

Change is Individual (and Emotional)

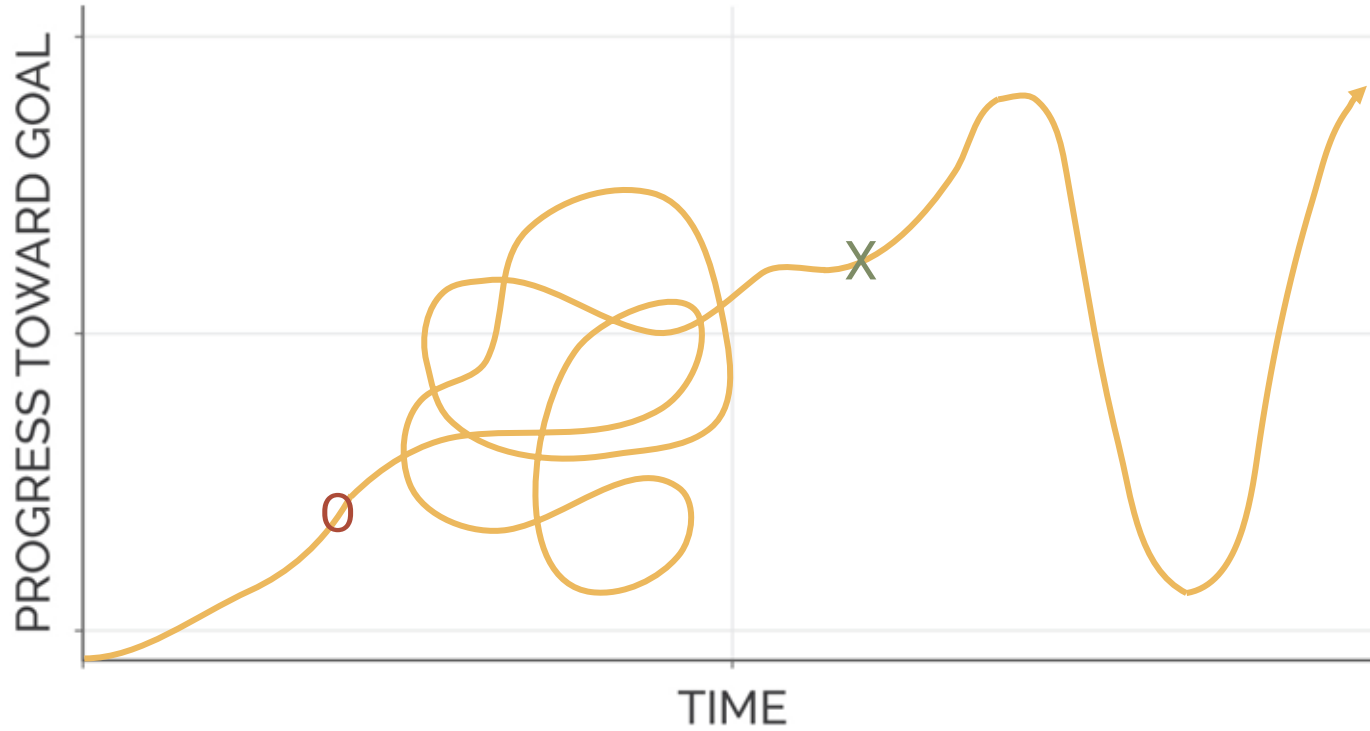




How People *Ideally* Respond to Change



How People *Actually* Respond to Change



Remember, Change is Emotional



Reflection



Consider *one* current change your team is experiencing.

Answer in your workbook:

- Where are *you* on the change journey, emotionally?
- What are the advantages of being where you are? What might be some drawbacks?

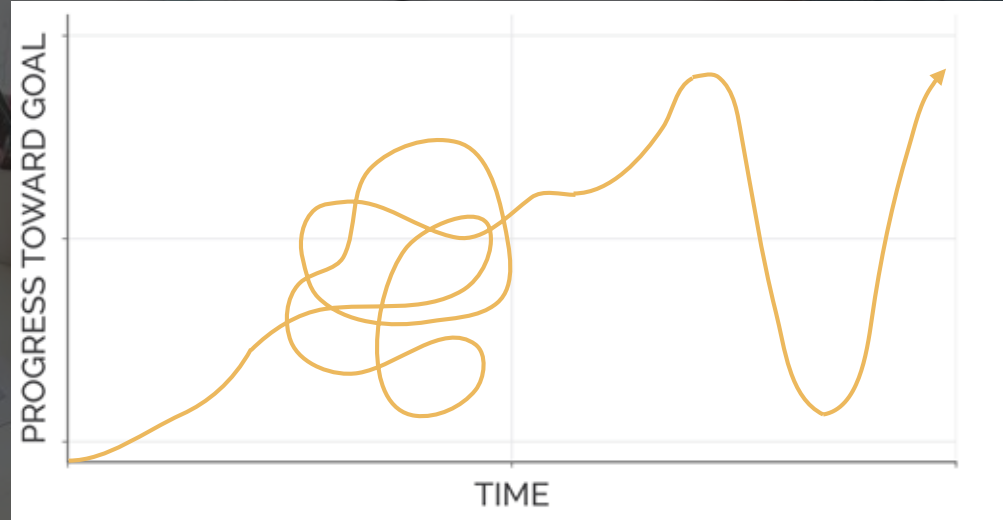


Debrief: Change Efforts



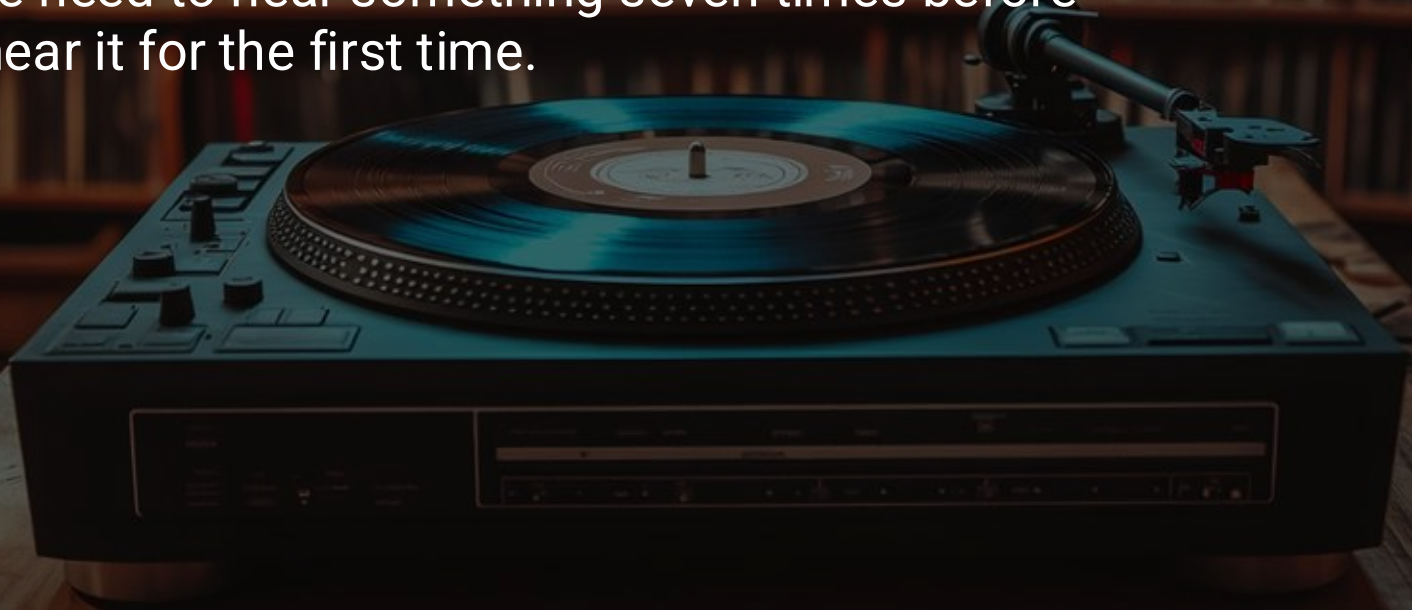
ACTIVITY

What were some “aha” moments you got from this section?



"You'll think you're a broken record long before your team thinks you're being clear."

People need to hear something seven times before they hear it for the first time.



Action Planner, part 1



ACTIVITY

HAND
OUT

1. Go to your Action Planner:
2. Choose **one** employee to fill out, now.
3. Estimate where your employee is on the Bridges' Transition Model in the **Emotional** section.

If the answer is, "I don't know," what questions can you ask your employee to help uncover this?

LEADING CHANGE THAT STICKS Action Planner

Employee Name:

How do you believe this person feels about the change? Consider their attitude, concerns, or energy level (positive or negative).

Emotional

What resistance (if any) might this person have and why? How will the change impact their role, comfort zone, or workload?

Estimate this person's emotional stage regarding this change.

How aware is this person of the change and why it's important?
Have they received clear communication? Do they understand the "why"?

Process

Do they have the knowledge and skills to implement the change?
Are you seeing evidence of competency and confidence in their new behaviors or habits?

Change Process: Informed, Motivated, Knowledgeable, Competent, Sustaining

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Emotional

How do you believe this person feels about the change? Consider their attitude, concerns, or energy level (positive or negative).

What resistance (if any) might this person have and why? How will the change impact their role, comfort zone, or workload?

Estimate this person's emotional stage regarding this change.

Change Happens at the Individual Level First



Organizational Change occurs when enough individuals in that organization ... **change.**

Change Happens at the Individual Level First



**But when we fail to bring people along
most Change Initiatives **fail**.**

Change Happens at the Individual Level First



**But when we fail to bring people along
most Change Initiatives **fail**.**

The Change Process





Are they informed of the need for change?

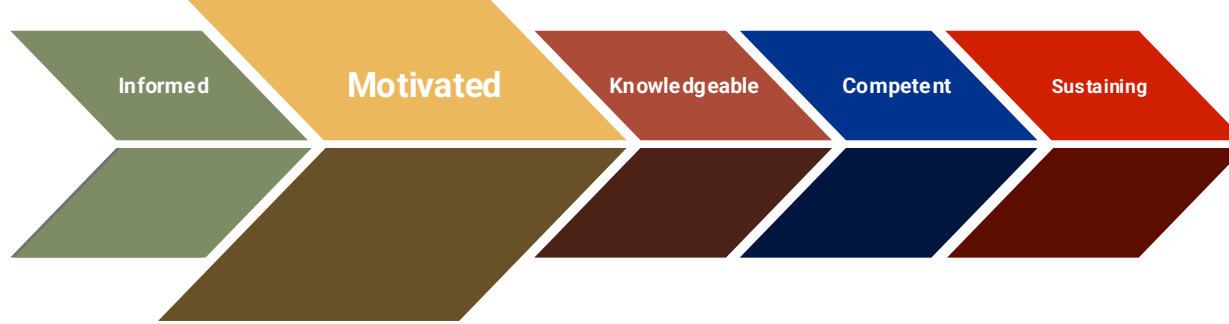
Do they understand the why, what's changing, and where we're going?

Informed looks and sounds like:

- “I know about the change and why it’s happening”
- Can clearly restate elevator pitch in their own words.
- Asks thoughtful questions about timing or impact.

NOT Informed looks and sounds like:

- “I didn’t know we were supposed to be doing this.”
- “Wait, when did this change?”
- Appears surprised or confused when expectations come up.



Are they motivated to participate in this change?

Do they believe the change matters and are they willing to engage?

Motivated looks and sounds like:

- “This is cool, I’m excited!”
- Engages in conversations without excessive negativity.
- Tries to align personal work with the change.
- “I don’t love it, but I understand why it matters and I’m on board.”

NOT Motivated looks and sounds like:

- “This will never work”, “I’m not doing that.”
- “Why can’t I keep doing things the same way?”
- Passive resistance, eye-rolling, silence, or overt sarcasm.
- “I don’t like it but I’ll do it anyway.”



Do they have the knowledge to act on the change?

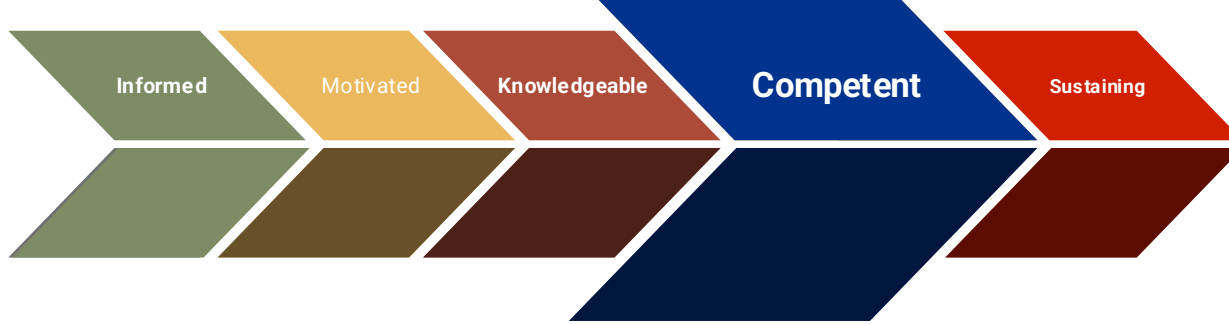
Do they know how to do what's being asked?

Knowledgeable looks & sounds like:

- Attends required training or reviews materials
- "I know what I'm supposed to do, I just need to practice it."
- Can explain new processes, tools, or resources when asked.

NOT knowledgeable looks & sounds like:

- "No one showed me how to do this."
- Asks questions they should know the answer to or have the resource for.
- Misses key steps or instructions repeatedly.



Are they competent enough to implement this change?

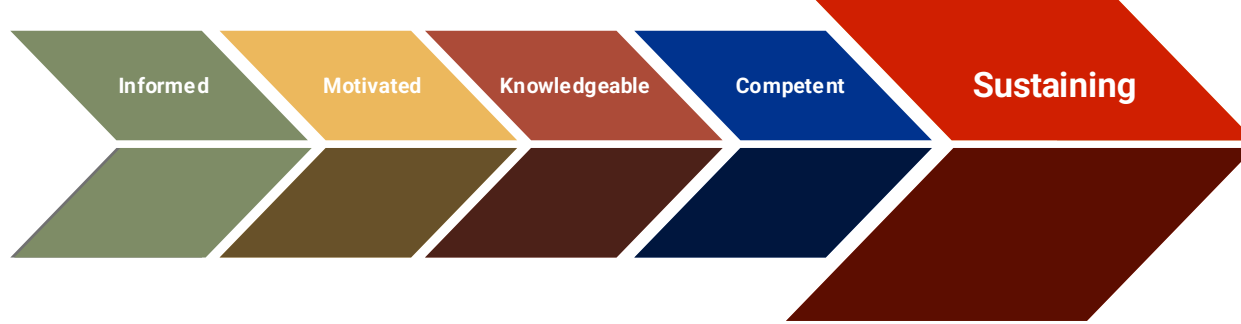
Can they execute the change with growing confidence?

Competent looks and sounds like:

- Demonstrates the skill through observable behavior.
- Uses new behaviors or tools consistently.
- Makes fewer mistakes & self-corrects.
- Has gained skills and ability to help others adapt to the change.

NOT competent looks & sounds like:

- Avoids using the new processes.
- “I’m not comfortable with doing this yet”.
- Repeatedly asks to revisit training, coaching, shadowing, or other assistance.



Are their ongoing activities reinforcing this change?

Is the change sticking over time?

Sustaining looks and sounds like:

- New behaviors feel routine and expected.
- Helps others learn or troubleshoot.
- Gives feedback on progress of adopting the change.

NOT sustaining looks & sounds like:

- Reverts to old habits under pressure.
- “Do we really still have to do it this way?”
- Needs frequent reminders or reinforcement.

Finding Bottlenecks: Where are People Stuck?



Action Planner, part 2



ACTIVITY

HAND
OUT

1. Go to your Action Planner:
2. Estimate where your employee is on the stages of change in the **Change Process** section.

If the answer is, "I don't know," what question can you ask your employee to help uncover this?

LEADING CHANGE THAT STICKS Action Planner

Employee Name:

How do you believe this person feels about the change? Consider their attitude, concerns, or energy level (positive or negative).

Emotional

What resistance (if any) might this person have and why? How will the change impact their role, comfort zone, or workload?

Estimate this person's emotional stage regarding this change.

How aware is this person of the change and why it's important?
Have they received clear communication? Do they understand the "why"?

How confident is this person in their ability to implement the change?
Have they received clear communication? Do they understand the "why"?

Change Process: Informed, Motivated, Knowledgeable, Competent, Sustaining

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Change Process

How aware is this person of the change and why it's important?
Have they received clear communication? Do they understand the "why"?

Do they have the knowledge and skills to implement the change?
Are you seeing evidence of competency and confidence in their new behaviors or habits?

Estimate where they are in the 5-step Change Process. Informed, Motivated, Knowledgeable, Competent, Sustaining

Start with YOU



Start with YOU.

Where am I in the change process?

Where are my team members in change process?

What do I need to do to get them to the next step?

Start with You



- Revisit the *one* change that you want to explore further in the workshop
- Reflect on where *you* are in the change process.
- With your partner: briefly describe the change and your position using the questions in your workbook.

ACTIVITY  **Start with You - Self-Reflection**

INSTRUCTIONS
Revisit one change that you want to explore in the workshop and answer the questions. With your partner, share the change and your position.

Describe the change. What's changing and why is it needed? Who will be impacted? Is this a short term or long term change? Has this change started yet or are you in the middle of it?

How did you find out about this change? (What was your initial reaction?)

What will be the benefits if this change is wildly successful? (Consider business factors and people factors)

What is at risk if this change effort fails? (Consider business factors and people factors)

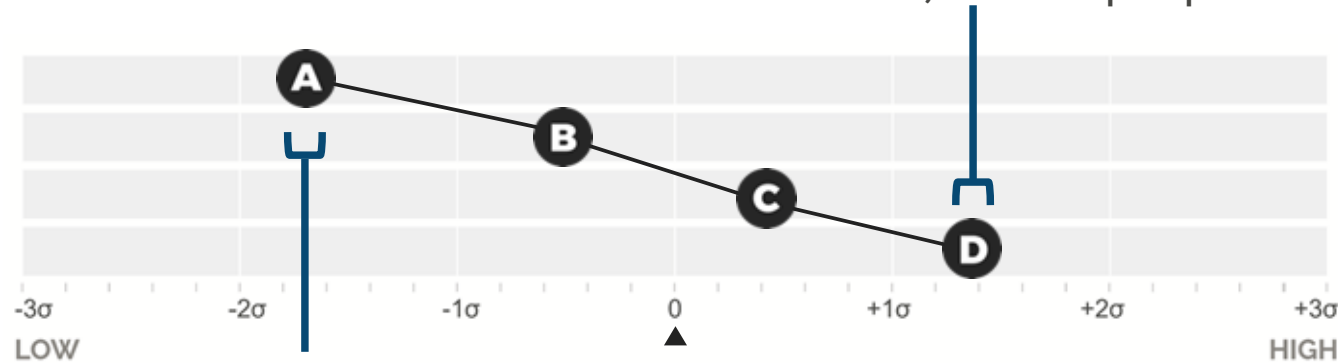
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DECATHLON V   

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Your Motivations and Response to Change

Identify the farthest **RIGHT** factor. That is the **strongest** Motivating Need. Coach to, communicate to, and keep top of mind.

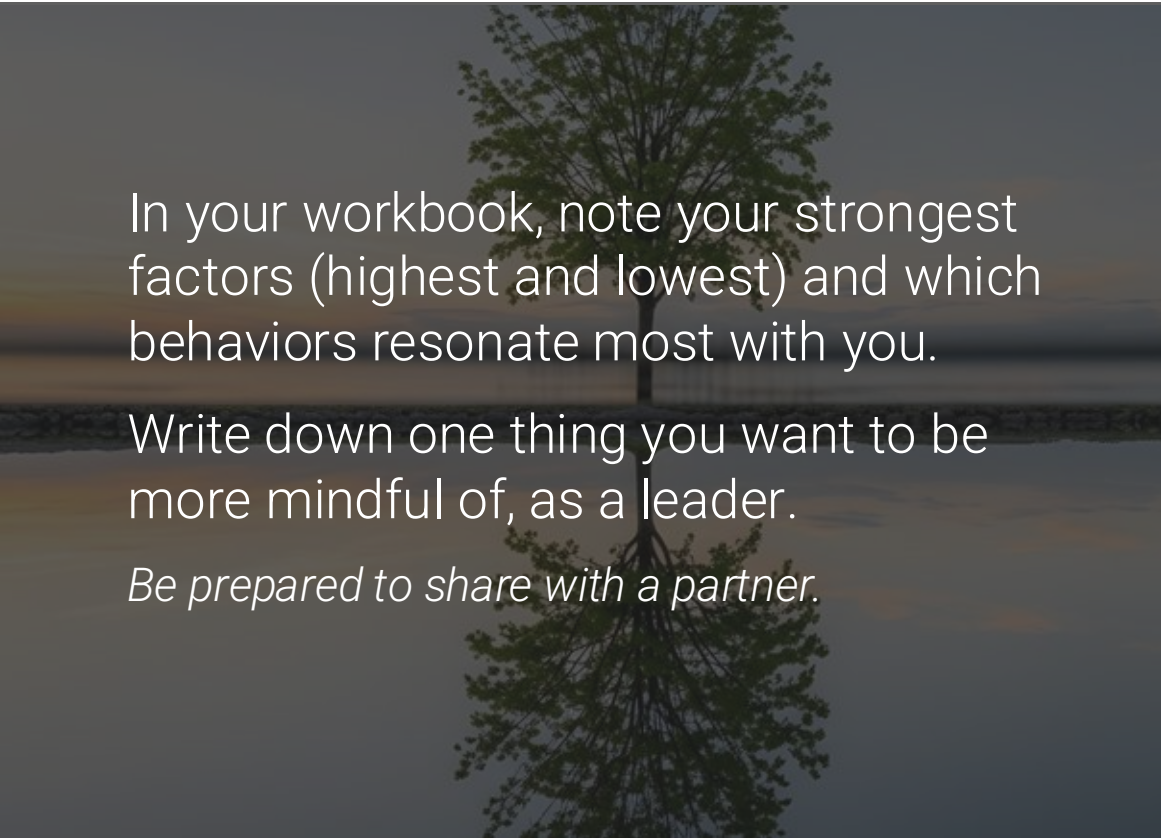


Identify the farthest **LEFT** factor. This is likely the **next strongest** Motivating Need. This should color, flavor, impact how you approach the strongest Motivating Need.

Your Response to Change, as a Leader

LOWEST	FACTOR	HIGHEST
Supportive. Helpful. Accommodating. May be overly concerned with disrupting team. May not hold others accountable.	A Dominance	Change is an opportunity to win, drive, take ownership. Holds others accountable. Undaunted by resistance.
Factual about change. Asks good questions. May not be vocal/inclusive enough. May “decide and announce”.	B Extraversion	Expressive, clear, articulates change. Can be persuasive advocates. May be sensitive towards others’ perceptions.
Change is exciting, motivating. Acts quickly. May struggle to slow down, listen. Underestimates time needed for others.	C Patience	Thoughtful listeners, will build consistency. Needs time to process, understand why. Less productive under pressure.
Flexible, adaptable, big picture focus. Can take action without much clarity. May not pay enough attention to guardrails/details.	D Formality	Excellent at building and implementing structure. Comes up with back-up plans. Needs structure, details, guidelines.

Reflection Activity



In your workbook, note your strongest factors (highest and lowest) and which behaviors resonate most with you.

Write down one thing you want to be more mindful of, as a leader.

Be prepared to share with a partner.



Identifying Bottlenecks with Powerful Questions

Your Role is to Determine:

Where am I in the change process?

Where are my team members in the change process?

What do I need to do to get them to the next step?

Your Role is to Determine:

Where am I in the change process?

Where are my team members in the change process?

What do I need to do to get them to the next step?

What Could You Do?



DISCUSSION:

How do you identify where someone is in the change process?

Observe the team climate.

Do individual check-ins.

Ask questions and listen.

What else?



5 Question Types (Reminder!)



Investigative

Describe.... Share.... Help me understand...



Interpretive

What if...



Productive

Describe your next step.



Speculative

What happens if you do _____?



Subjective

How do you really feel about _____?

Powerful Questions: *Brainstorm*



Brainstorm questions you could ask to uncover your team's perspectives, concerns, and needs.

Write down questions for each of the five categories.

Be prepared to share.

Case Study 1: Liz and John



Read through the Case Study.

Notice the type of questions Liz asks and notice John's responses.

- Identify what stage of the process John is stuck in.
- Answer the questions in your workbook.



Debrief: Liz and John



ACTIVITY

1. How would you rate Liz's use of powerful questions?
2. How would you rate Liz's listening skills during this conversation?
3. What phase is John stuck in?
4. What recommendations do you have for Liz for next steps after this conversation?

Correct Your Work



Review your question list on page 26.

Revise any questions, based on what you learned from this case study.

Pick of your one of your questions you would suggest to Liz.



Case Study 2: Liz and Sarah



Read through the Case Study Part 2.

Notice the type of questions Liz asks and notice Sarah's responses.

- Identify what stage of the process Sarah is stuck in.
- Answer the questions.



Debrief: Liz and Sarah



ACTIVITY

1. How would you rate Liz's use of powerful questions?
2. How would you rate Liz's listening skills during this conversation?
3. What phase is Sarah stuck in?
4. What recommendations do you have for Liz for next steps after this conversation?

Correct Your Work



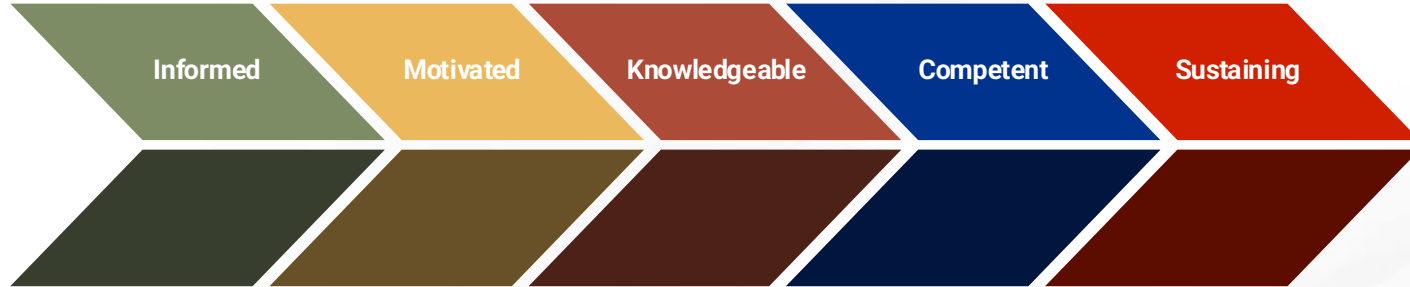
Review your question list from page 26.

Revise any questions, based on what you learned from this case study.

Pick one of your questions you would suggest to Liz.



Questions by Stage



In your groups:

Brainstorm questions for each stage that will help you uncover what your team member needs to be able to move to the next stage.

Leading with Questions



- You're not an answer vending-machine
- Lead with curiosity (learning, not judging)
- Listening builds trust

*Discuss: What if you don't know or have the answer?
What should you do or say?*

Action Planner - Action



ACTIVITY

HAND
OUT

Go to your Action Planner to the **Action** section.

Write down at least one **question** for each employee that you will ask to help uncover their needs and move them forward in the change process.

Action

Questions I can ask:

LEADING CHANGE THAT STICKS Action Planner

What is their natural response to change from a PI lens? Look at their two strongest factors:

Factor	Response
1. Discomfort	Change is uncomfortable to them. They feel it's a loss of control. They feel it's a loss of status. They feel it's a loss of power. They feel it's a loss of respect. They feel it's a loss of dignity. They feel it's a loss of honor. They feel it's a loss of pride. They feel it's a loss of self-respect. They feel it's a loss of self-dignity. They feel it's a loss of self-honor. They feel it's a loss of self-pride. They feel it's a loss of self-respect. They feel it's a loss of self-dignity. They feel it's a loss of self-honor. They feel it's a loss of self-pride.
2. Discomfort	Change is uncomfortable to them. They feel it's a loss of control. They feel it's a loss of status. They feel it's a loss of power. They feel it's a loss of respect. They feel it's a loss of dignity. They feel it's a loss of honor. They feel it's a loss of pride. They feel it's a loss of self-respect. They feel it's a loss of self-dignity. They feel it's a loss of self-honor. They feel it's a loss of self-pride.

What do they need from you? Look at their two strongest factors:

Factor	Response
1. Discomfort	They need a response to their discomfort. They need a response to their loss of control. They need a response to their loss of status. They need a response to their loss of power. They need a response to their loss of respect. They need a response to their loss of dignity. They need a response to their loss of honor. They need a response to their loss of pride. They need a response to their loss of self-respect. They need a response to their loss of self-dignity. They need a response to their loss of self-honor. They need a response to their loss of self-pride.
2. Discomfort	They need a response to their discomfort. They need a response to their loss of control. They need a response to their loss of status. They need a response to their loss of power. They need a response to their loss of respect. They need a response to their loss of dignity. They need a response to their loss of honor. They need a response to their loss of pride. They need a response to their loss of self-respect. They need a response to their loss of self-dignity. They need a response to their loss of self-honor. They need a response to their loss of self-pride.

Based on the above PI insights, what do they need from you, as their leader? Will they need competition, reassurance, action, time to think, freedom, clarity of expectations?

What is the frequency and depth of interactions this person needs? High frequency, high depth, low frequency, low depth.

Questions I can ask:

My next step:



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Leading Others Through Change with PI®

Your Team's Response to Change

LOWEST	FACTOR	HIGHEST
Supportive. Helpful. May be overly concerned with disrupting team. May not voice disagreement/concerns.	A Dominance	Change is an opportunity to win, drive, take ownership. Undaunted by risk. Challenges - Could push back.
Factual about change. Analytical. Thoughtful. Asks good questions. May not be voice own ideas or opinions.	B Extraversion	Expressive about own opinions. Can be persuasive advocates. If not on board, can lobby against change.
Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting.	C Patience	Skeptical about change. Needs time to process, understand why. Less productive under pressure.
Flexible, adaptable, big picture focus. Can take action without much clarity. May not pay enough attention to guardrails/details.	D Formality	Skeptical, wants to know details. Asks exacting questions. Excellent at building and implementing structure.

Activity: PI Factors



Instructions:

Identify your employee's highest and lowest factor.

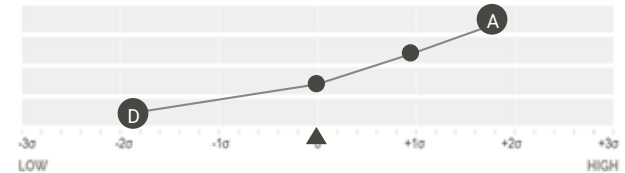
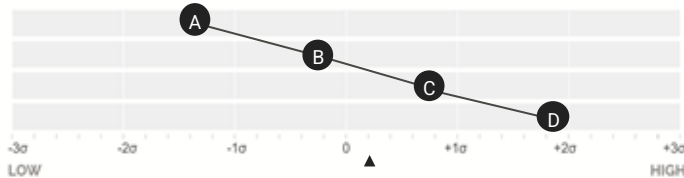
Using the table in your workbook, note one strength and one challenge that may be affecting their current response to the change you've been exploring in this workshop.



Address the stages of the model with PI



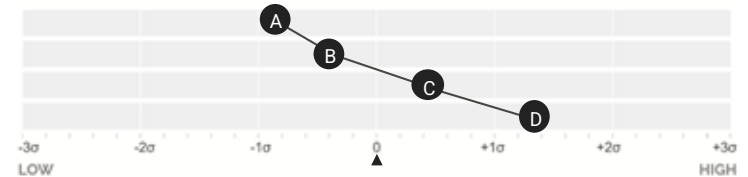
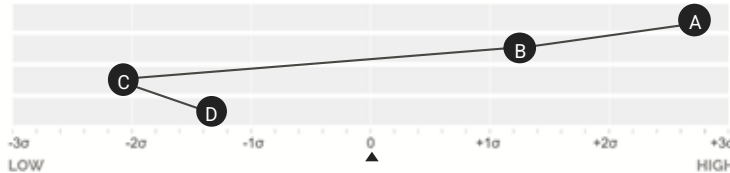
How might **Informed** look different for these two employees?



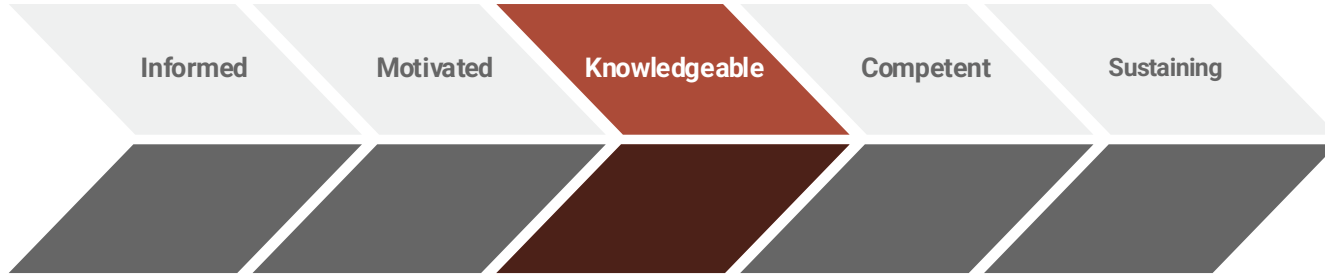
Address the stages of the model with PI



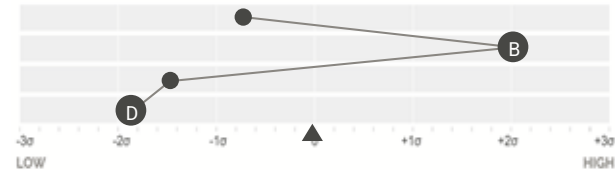
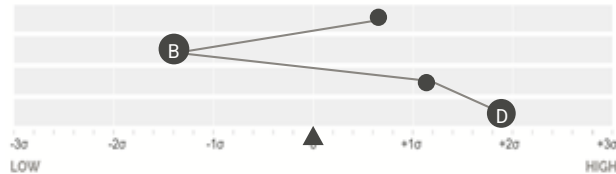
How might **Motivated** look different for these two employees?



Address the stages of the model with PI



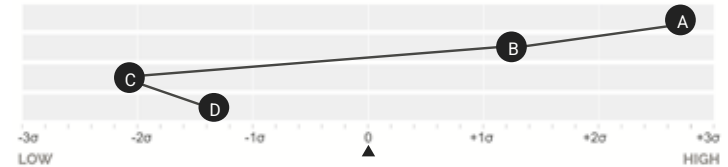
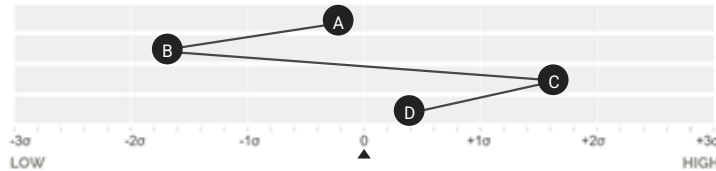
How might **Knowledgeable** look different for these two employees?



Address the stages of the model with PI



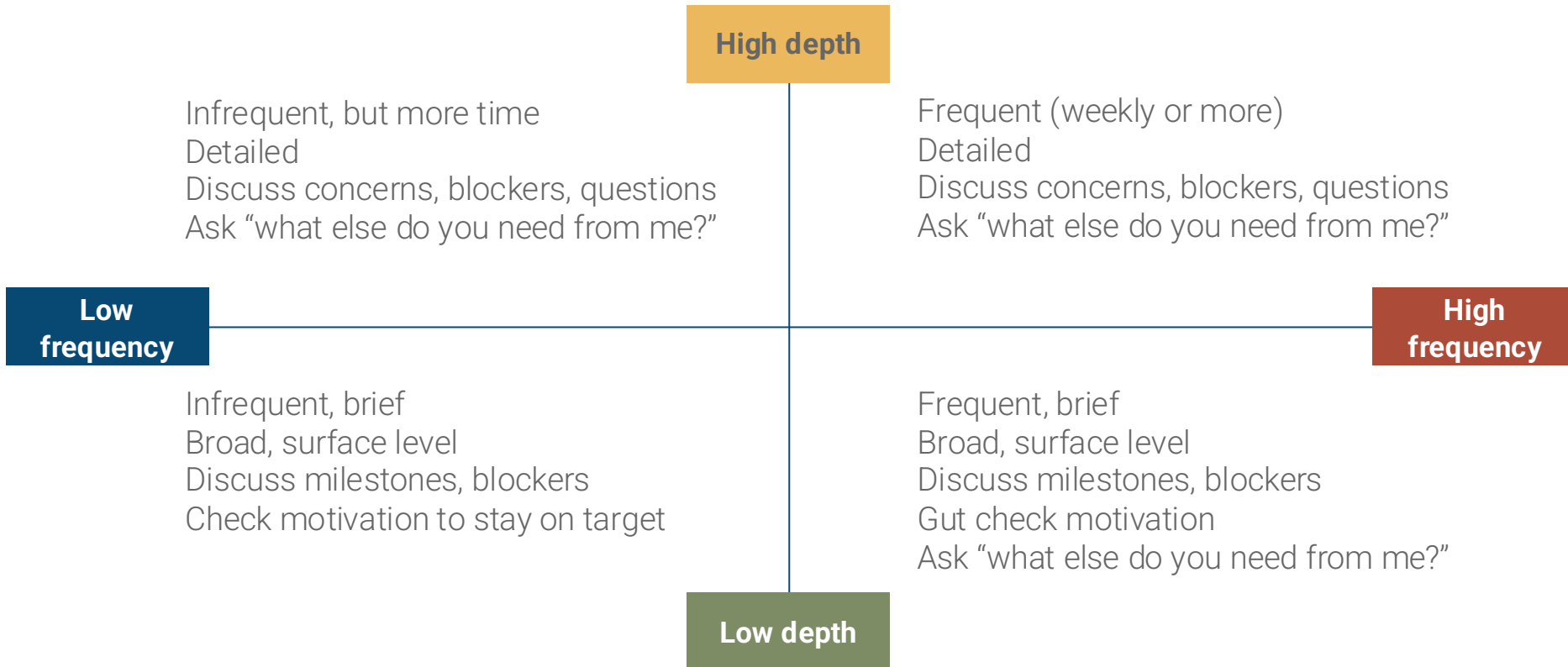
How might **Competent** look different for these two employees?



What They Need From You

LOWEST	FACTOR	HIGHEST
Clearly define how the change helps others. Reassure of your confidence in them. Encourage to share thoughts	A Dominance	Define outcomes , rewards for successfully implementing change and consequences for failing. Challenge them to “win”.
Give facts, don't sugarcoat. Private time to think, absorb information. Space to ask questions.	B Extraversion	Opportunities to share their feelings, ideas out loud. Reminder they can increase their credibility by handling this change well.
Clear, concise direction on the action and timeline. Verbal summary to ensure understanding.	C Patience	Depth and clarity on why things are changing before the change occurs. Time to get ready for the change.
Clear outcomes and guardrails. Space to figure out “how” on their own (where appropriate).	D Formality	Depth of clarity , expectations, thorough training. Multiple progress checks to avoid mistakes. Written communication/processes

Frequency and Depth of Check-ins

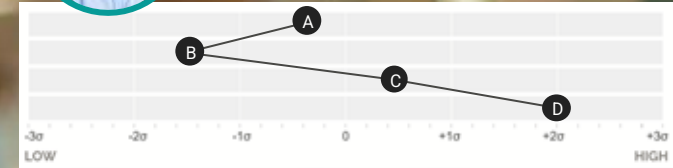


Liz, John, Sarah Part 2



In your groups, discuss:

- What is John's response to change?
- What is Sarah's response to change?
- Where might John or Sarah get stuck or bottlenecked, based on their PI?
- How might Liz communicate and motivate John or Sarah, based on their strongest motivating needs?
- What else might you suggest Liz do?



Action Planner, part 3



ACTIVITY

HAND
OUT

Go to your Action Planner to the **Predictive Index** section.

Identify your employee's highest and lowest factor to determine their response to change and their needs. Summarize what they need from you.

Predictive Index®

What is their natural response to change from a PI lens? Look at their two strongest factors.		What do they need from you? Look at their two strongest factors.	
LOWEST	HIGHEST	LOWEST	HIGHEST
A Dominance Supportive, helpful. May be overly concerned with disrupting team. May not voice disagreement/objection. Change is an opportunity to win, drive, take ownership. Uninhibited by risk. Challenges. "Clash back."	B Extroversion Expressive about new options. Can be persuasive advocate. If not at least, can lobby against change. Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting.	A Dominance Clearly define how the change helps others. Reassure of your confidence in them. Reinforce if above thoughts. Define outcomes, rewards for successfully implementing change and consequences for failing. Challenge them to "win".	B Extroversion Give facts, start responses. Provide time to think, absorb information. Space to ask questions. Opportunities to share their feelings, ideas and feedback. Share your excitement for their credibility in handling this change well.
C Patience Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting. Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting.	D Formality Thoughtful, wants to know details. Asks probing questions. Excellent at building and implementing structure.	C Patience Clear, concise direction on the action and timeline. Initial summary to ensure understanding. Depth and clarity on why things are changing before the change comes. Time to get ready for the change.	D Formality Depth of clarity, expectations, thorough training. Multiple program checks to avoid mistakes. Written communication processes.

Based on PI Insights, what do they need from you, as their leader? Will they need competition, reassurance, action, time to think, freedom, clarity of expectations?

What is the frequency and depth of interactions this person needs? High frequency, high depth, low frequency, low depth.

LEADING CHANGE THAT STICKS Action Planner

What is their natural response to change from a PI lens? Look at their two strongest factors.		What do they need from you? Look at their two strongest factors.	
LOWEST	HIGHEST	LOWEST	HIGHEST
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C Patience Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting. Change is exciting, motivating. Acts quickly. May struggle to slow down and listen before acting.	D Formality Thoughtful, wants to know details. Asks probing questions. Excellent at building and implementing structure.	C Patience Clear, concise direction on the action and timeline. Initial summary to ensure understanding. Depth and clarity on why things are changing before the change comes. Time to get ready for the change.	D Formality Depth of clarity, expectations, thorough training. Multiple program checks to avoid mistakes. Written communication processes.

Based on the above PI Insights, what do they need from you, as their leader? Will they need competition, reassurance, action, time to think, freedom, clarity of expectations?

What is the frequency and depth of interactions this person needs? High frequency, high depth, low frequency, low depth.

Questions I can ask:

My next step:

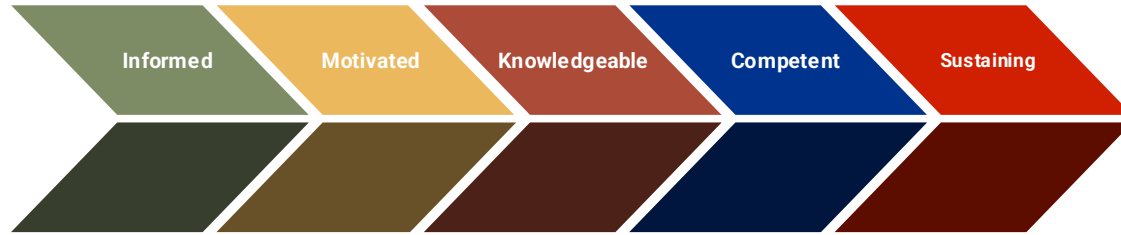


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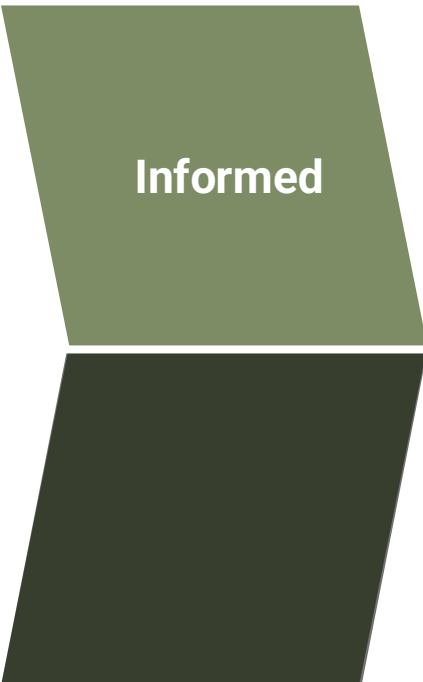
Guiding Your Team Through the Change Process

Am I Helping Them Change?



1. Do they know what is changing and why?
2. Are they willing and engaged with the change?
3. Do they have the knowledge needed to implement the change?
4. Have they practiced and fostered the ability to execute the change?
5. Have they established new habits and skills to ensure the change sticks?

Am I Keeping Them:



Informed

Define the why

- What is the problem we are solving?
- What happens if we don't change?
- What evidence shows that we need to change?

Paint a clear vision for the future

- What will success look like?
- How will it benefit the team, customers, org?
- Equate the change to something familiar

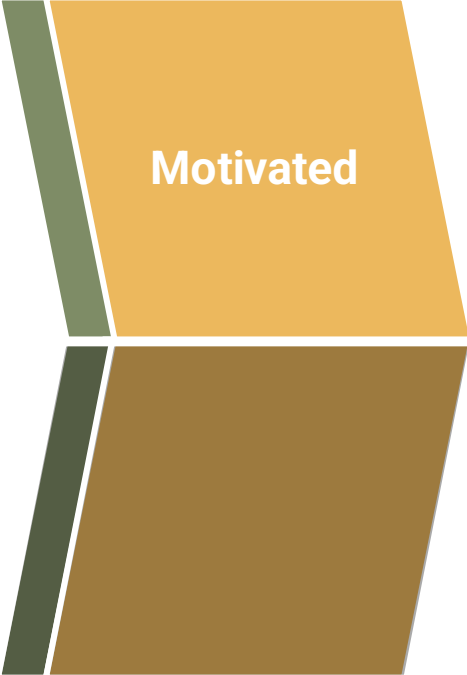
Accept team input and questions

- What questions do you have?
- What concerns should we address?
- What ideas do you have?
- What support will you need?



**Your
elevator
pitch!**

Am I Keeping Them:



Motivated

Communicate down and communicate up

- Inform your team what is happening and changing
- Voice your team's concerns and challenges to leadership

Model and advocate

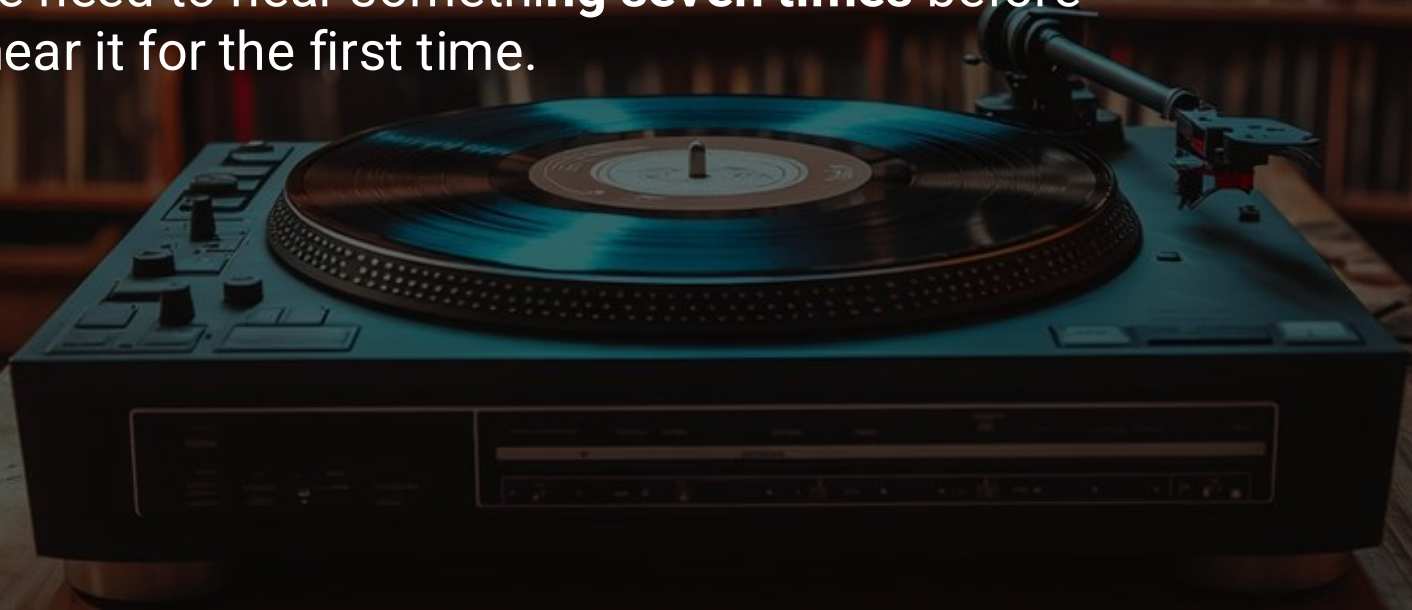
- Speak positively about the change
- Be transparent and share your own challenges

Anticipate needs

- Get curious about concerns
- Speak to the "WIIFM"
- Recruit your change advocates

"You'll think you're a broken record long before your team thinks you're being clear."

People need to hear something **seven times** before they hear it for the first time.



Talking about Change

Think about the change you discussed in the opening activity.

- **Part 1:** Create your elevator pitch using the template in your participant materials.
- **Part 2:** Deliver your pitch to someone at your table and get some feedback.

Part 1: Build Your Pitch

Your Change: _____

Opening Hook:

We are **<action>** to **<result of action>** because of **<need for action>**.

The Challenge/Opportunity:

Right now, **<new need or requirement>**. This means **<need for change of behavior>**.

The Solution/Vision:

With **<new process>** we will be able to **<need met>**. For our team, this means **<ideal outcome>**.

Call to Action/Next Steps:

<Timing> we will **<first step of new process>**. I need **<individual actions>**.

YOUR CHANGE

OPENING HOOK

THE CHALLENGE/
OPPORTUNITY

THE SOLUTION/
VISION

CALL TO ACTION/
NEXT STEPS

We are <action> to <result of action> because of <need for action>.

Right now, <new need or requirement>. This means <need for change of behavior>.

With, <new process> we'll be able to <need met>.
For our team, this means <ideal outcome>.

<Timing> we will <first step for new process>. I need <individual actions>.

Example: Oshkosh Bank

YOUR CHANGE

Oshkosh Bank is implementing new compliance procedures for loan processing. All loan officers must now complete additional verification steps and use updated forms.

OPENING HOOK

We are <action> to <result of action> because of <need for action>.

We are **implementing new compliance procedures to verify loan requests** because of **federal regulatory updates**.

THE CHALLENGE/
OPPORTUNITY

Right now, <new need or requirement>. This means <need for change of behavior>.

Right now, **we are required to complete these verification steps**. This means **our team needs to implement the new forms into their daily routines**.

THE SOLUTION/
VISION

With, <new process> we'll be able to <need met>.

For our team, this means <ideal outcome>.

With **this process** we'll be able to **meet regulations and provide more security**. For our team this means **fewer mistakes and better customer satisfaction**

CALL TO ACTION/
NEXT STEPS

<Timing> we will <first step for new process>. I need <individual actions>.

This week we will **attend training on the new process/forms**. I need **you each to confirm your availability for the training**.

Activity: Build Your Pitch



Take five minutes to fill out the pitch form in your workbook.

YOUR CHANGE	
OPENING HOOK	<i>We are <action> to <result of action> because of <need for action>.</i>
THE CHALLENGE/ OPPORTUNITY	<i>Right now, <new need or requirement>. This means <need for change of behavior>.</i>
THE SOLUTION/ VISION	<i>With, <new process> we'll be able to <need met>. For our team, this means <ideal outcome>.</i>
CALL TO ACTION/ NEXT STEPS	<i><Timing> we will <first step for new process>. I need <individual actions>.</i>

Tips for Delivery

Before you speak

- Know your audience: Tailor the personal impact to what matters to *them*.
- Practice out loud: Time yourself and refine it until it flows naturally.
- Prepare questions: Pause for understanding, asking these questions:
 - How are you feeling about this?
 - Tell me what you're worried about.
 - Share your comfort level with all this.
 - What else do you need to get started?

Tips for Delivery

While Speaking

- Confident body language: Stand tall, make eye contact, use gestures
- Speak with conviction: Even if you have doubts, focus on the vision
- Watch for reactions: Adjust your energy based on their engagement
- Acknowledge what you know and don't know: It's okay to say *"I don't have the answer to that right now, but I will find out."*

Deliver Your Pitch!



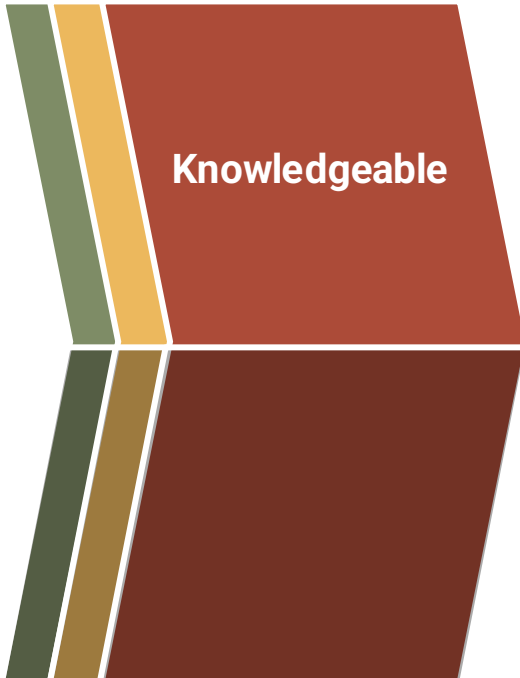
With your partner, deliver the pitch you wrote!

Give your partner feedback on:

- Did the pitch cover the “why”?
- Did the pitch cover “what’s in it for me,” as the employee?
- What did they do well and what could be better?



Am I Keeping Them:



What kind of training is required?

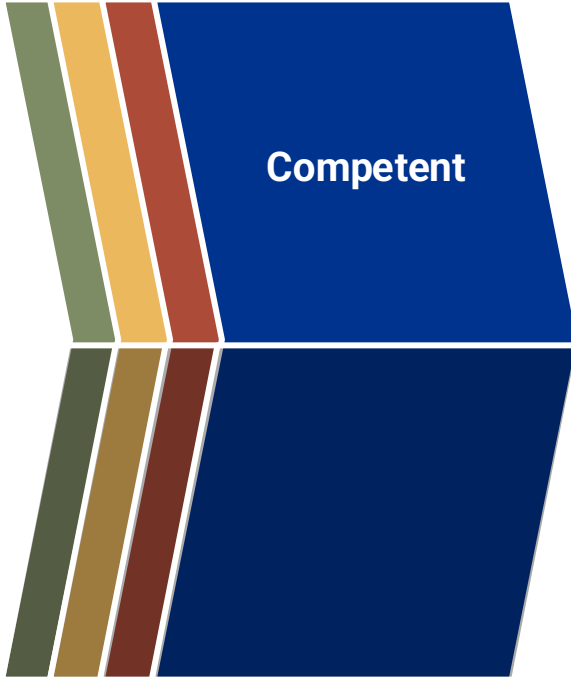
Consider learning pace and style.



MOST COMMON ERROR

- Companies frequently *start* here without doing the Inform and Motivate steps.
- What is behind this?
- What impact does it have?

Am I Getting Them:

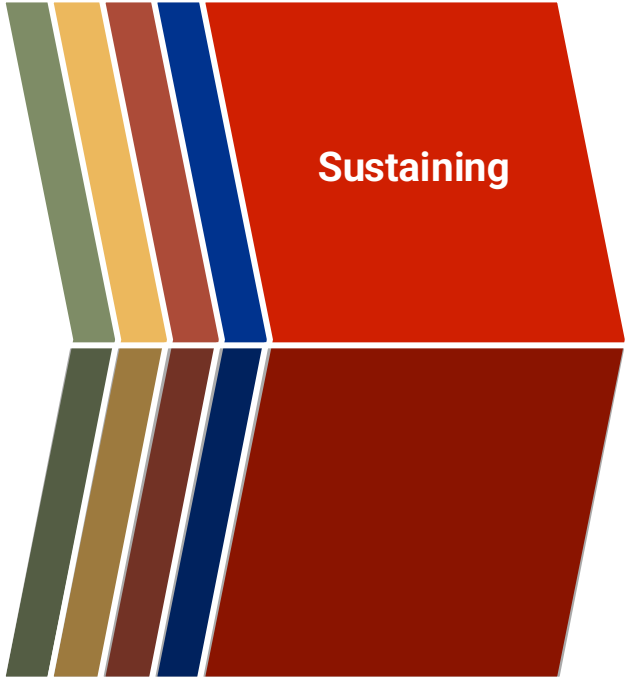


How will I provide practice?

How will I build confidence?

How will I provide resources?

Are they:



Build systems and monitor them.

Create accountability.

Celebrate success and reward progress.

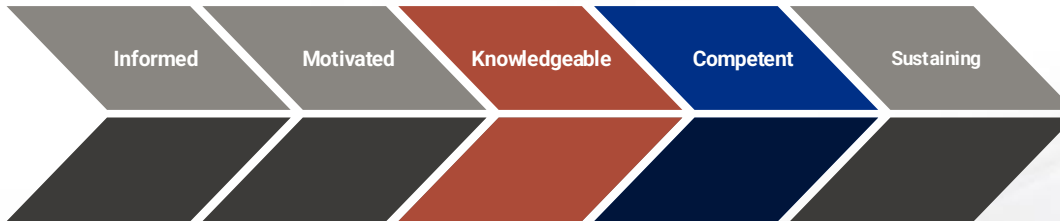
Address the “drift back” tendencies of old habits.

Knowledgeable & Competent

Revisit the same change you've been working on.

Evaluate what success looks like for the stages *Knowledgeable* and *Competent*.

Be as specific as possible.



ACTIVITY

 Knowledgeable & Competent

INSTRUCTIONS:
Revisit the same change you've been working on. Evaluate **what success looks like for the stages Knowledgeable and Competent**. Be as specific as possible.

The change is:

What kind of behavioral change is required?

What new knowledge or understanding is required?

How should performance shift during the change?

What does success look like?

What do my employees need to do to be competent?

What are the metrics for competency?

DECATHLON 

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 **M**

Finalize Action Planner

Putting it all together!

- Complete your action planner for one employee.



ACTIVITY

HAND
OUT

LEADING CHANGE THAT STICKS Action Planner

Employee Name: _____

How do you believe this person feels about the change? Consider their attitude, concerns, or energy level (positive or negative)

What resistance (if any) might this person have and why? How will the change impact their role, comfort zone, or workload?

Estimate this person's emotional stage regarding this change

How aware is this person of the change and why it's important? Have they received clear communication? Do they understand the "why"?

Do they have the knowledge and skills to implement the change? Are you seeing evidence of competency and confidence in their new behaviors or habits?

Estimate where they are in the 5-step Change Process: informed, Motivated, knowledgeable, Competent, Sustaining



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3 CHANGE THAT STICKS Action Planner

natural response to change from a PI
her two strongest factors

What do they need from you? Look at their two strongest factors:

above PI insights, what do they need from you, as their leader? will they need competition, reassurance, action, values, clarity of expectations?

frequency and depth of interactions this person needs? high frequency-high depth, low frequency-low depth

can ask:



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Conclusion/Wrap-up



Write in your workbook and be ready to share with the group:

1. What ONE most important action/commitment will you take? Include WHEN you will take it and how you'll know you've been successful.
2. Choose an accountability partner.
3. Share your commitment with them and describe what would keep you accountable.
4. Be prepared to share out loud.



Wrap Up

- Ongoing
 - Time management
 - Habit tracking
 - Focus time scheduled & executed
 - Delegation tracking (Hrs saved)
 - STAR® Manager – advance two (2) modules
 - Project work
- NEW
 - Execute one Performance Snapshot with your team (June session)

Decathlon V: Session 7 Feedback



Topics Covered:

DAY 1:

- Performance Snapshots
- OBRs
- AI-assisted leadership

DAY 2:

- Change Process
- 5-Step Model for Change
- Leader's Role in Change
- Questions & PI Role in Executing Change