



PARTICIPANT WORKBOOK

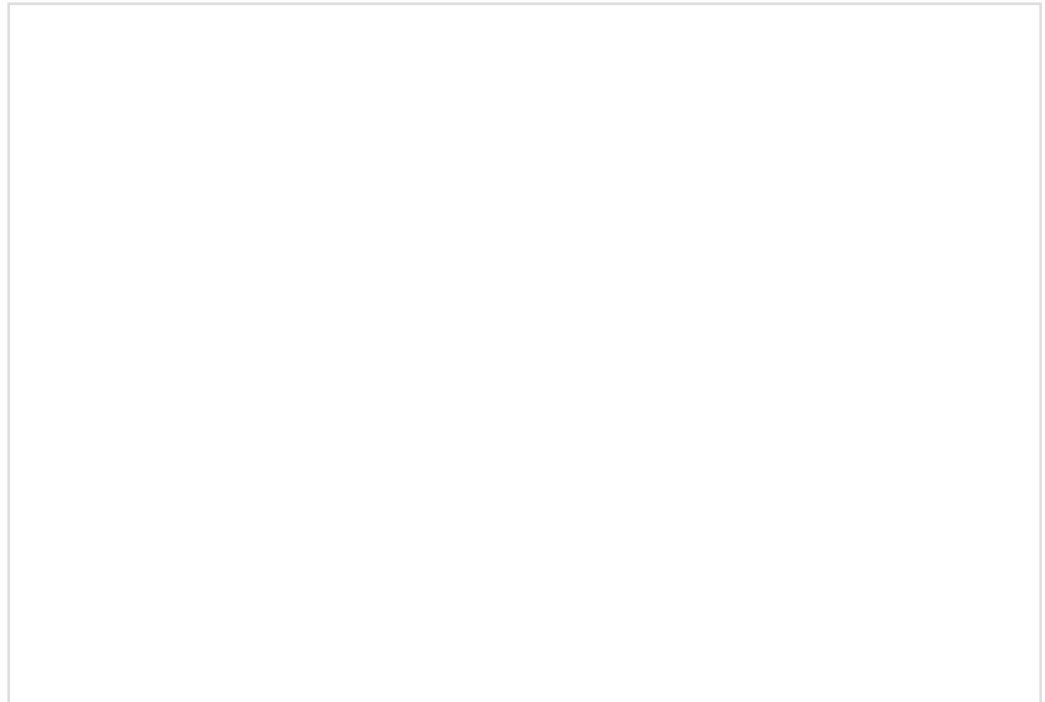
MASTERING CRITICAL BUSINESS CONVERSATIONS



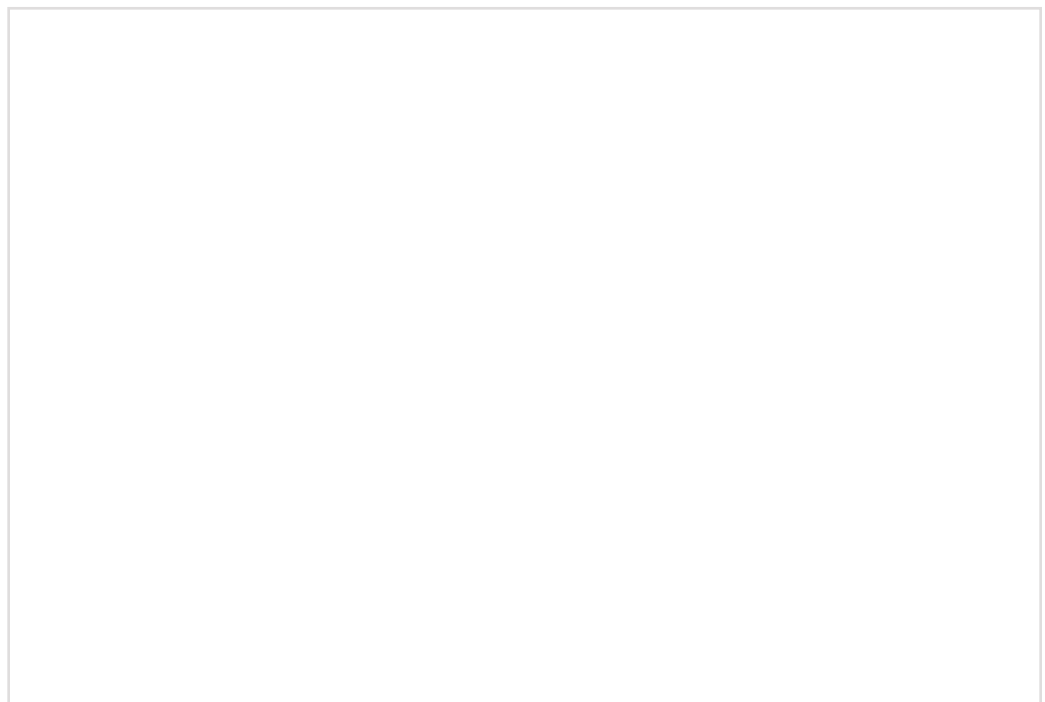
© 2026 KMP Consultants and MindWire, Inc.



STAR® MANAGER PROGRESS UPDATE



LEADERSHIP COMMITMENT



Session Design Philosophy

ETHOS as the Throughline

Every tool and simulation ties back to the GD-OTS ETHOS values — Honesty, Trust, Transparency, Alignment. ETHOS becomes the living vocabulary you reach for when stakes are high.

One High-Impact Simulation

The Atlas Program Crossroads
Pressure
Conflicting priorities
Incomplete information

Two Conversation Toolkits

CLEAR™ for preparation.
BRIDGE™ for navigation.

Sequential Learning Design

Framework first → Tools → Application under pressure
Internalizing the “why” before you practice the “how.”

Connecting to Prior Sessions

Coaching Work

Recognize familiar principles in CLEAR™ & BRIDGE™.

VIER™ & PARR™

CLEAR™ and BRIDGE™ are the Session 8 counterparts — same portable design philosophy.

STAR® Manager & Predictive Index

STAR® Manager and established research are the foundations.

PI profiles serve as a data point within CLEAR's Landscape and BRIDGE's Read steps.

STAR® Manager Missions 17 & 18

Mission 17 → CLEAR™.

Mission 18 TGROW → BRIDGE™.

The Moment That Defines Leaders

What defines an organization?

When have you faced a moment that required you to:

- say something uncomfortable
- surface a problem no one wanted to name,
- hold a line when the path of least resistance was to let it slide.

How you handle those moments — not your results in the easy ones — is what as a leader.

Family Feud - Decathlon Style

NOTES:

ETHOS Dialogue Framework

The Compounding Cost

One missed conversation

A problem goes _____.
_____ develop.

The team learns that certain things don't get said. _____ becomes the norm.

A pattern of missed conversations

A team stops _____. Problems surface only when they're too large to ignore.

Leadership loses _____ into what's actually happening on the ground.

What culture is actually made of

The aggregate of all the conversations that have happened — and all the ones that didn't.

Culture is not declared. It is _____.

The safety-culture connection

The cost is not just organizational.

When people stop surfacing problems, safety and quality risk accumulates invisibly until it isn't.

ACTIVITY



ETHOS In Action

Break into four groups.

Review the scenario.

Discuss these questions:

What was the cost?

What ETHOS value(s) were compromised?

What approach would have ensured on-going credibility and trust?

NOTES:

ETHOS In Action Notes

What was the cost?

What ETHOS value(s) were compromised?

What approach would have ensured ongoing credibility and trust?

The Program Review

The Story

Marcus runs a program review. The schedule has slipped six weeks — he's known for eleven days. He presents "some adjustments required to upcoming milestones." The customer nods. Nine days later, they find out from a supplier. Their first call is not about the schedule slip.

The Cost

A corrective conversation that should have happened in the first 30 seconds of the review became a _____.
The customer's first question was not about the schedule — it was about _____.
_____.

The Missing Value: _____

Marcus didn't lie. But he chose language that allowed the customer to leave believing the program was essentially on track. The issue was real, urgent, and known. The choice not to name it directly is its own kind of _____.

With Honesty

"I need to lead with a problem. The schedule has slipped six weeks. I want to put everything in front of you so we can make a decision together."
_____ — and the only opening that saves the relationship.

The Customer Meeting

The Story

Sarah has two estimates when she walks into the customer meeting. Monday's: four weeks. Tuesday morning's: seven to eight weeks. She presents four weeks, tells herself she'll follow up once confirmed. The customer approves a four-week hold. At week five, they pull the contract terms.

The Cost

The _____
from the omission was worse than the delay would have been. The customer's question at week five was not about the timeline — it was about whether Sarah had known. She had.

The Missing Value: _____

Sarah chose the number that made the conversation easier. _____.
_____. That choice — to present the comfortable truth and withhold the harder one — is the failure transparency is designed to prevent.

With Transparency

"The number I had Monday was four weeks. I got a revised estimate this morning — seven to eight weeks.
I'm giving you both because you need to plan around the real one." That is transparency.

The Engineering Review

The Story

The customer's engineer has always believed the spec threshold was too tight for this alloy. In the review, he starts to raise it. The PM is mid-sentence. He waits, then the slide advances. He decides not to interrupt. He plans to send an email. He doesn't.

The Cost

A joint engineering review convened at week four concluded that the spec threshold was indeed wrong.

The _____ that could have changed everything was in the room on day one. It never got out.

The Missing Value: _____

Nothing in the room signaled that his concern would land as useful rather than combative. People don't suppress critical information because they lack words. They suppress it because the perceived _____ of speaking exceeds the perceived _____.

With Trust

The PM stops talking. "Before I take you through what we're proposing — what are you most concerned about?"

She listens without building her rebuttal. The engineer speaks. The meeting changes.

What We Agreed To

The Story

The meeting ends well. Both sides feel progress was made. The PM's notes: "Customer agreed to four-week hold." The customer's notes: "Timeline TBD — will reassess at next quarterly review." Two weeks later, the PM sends a status update. The customer calls within the hour.

The Cost

Three days reconstructing what was decided. The customer's legal team got involved. The relationship — which survived the quality issue itself — did not fully recover from the disagreement about what was said.

The Missing Value: _____

Neither party was lying. Both believed they were accurately recording what happened. What was missing was the _____ closing step — restating commitments aloud, hearing them back, naming what was still open.

With Alignment

"Before we close — can we restate what we've actually agreed to? I'll start, and then I want to hear it back from your side."

Five minutes. The conversation that prevents the three days of lost time.

ETHOS as the Operating System

Tools vs. Condition

Tools can be used honestly or cynically.

ETHOS is the _____ that determines whether the tools work as designed.

A Sequence, Not a Checklist

Honesty creates the _____.

Transparency builds the _____.

Trust opens the _____.

Alignment closes the _____.

Without ETHOS: _____ Performance

A leader can run BRIDGE technically correctly and still steer toward a conclusion already decided. The other party may never realize it.

That is not a critical conversation — it is a sophisticated performance.

With ETHOS: _____ Dialogue

ETHOS operating underneath the frameworks means the other party is:

- genuinely heard
- fully informed
- part of a real decision

The ETHOS Conversation Arc

Honesty — Open with _____

Name the issue directly in the first 30 seconds

Say the uncomfortable thing before you feel ready.

The opening sets the conversational contract.

Transparency — Share the _____

Put all relevant information on the table, including what weakens your position.

Share the data that makes your case harder.

Name what you don't know.

Trust — Earn the Right to Be _____

Acknowledge the other person's perspective before advancing yours.

Stay curious when you want to be right.

Acknowledge a point that complicates your argument.

Alignment — Close with Shared _____

Confirm next steps, owners, and timeline.

Alignment is clarity, not consensus.

Name real disagreement instead of accepting false consensus.



A Question Worth Sitting With

Think of a critical conversation you have avoided, softened, or delayed.

Which ETHOS value did you sacrifice — Honesty, Transparency, Trust, or Alignment?

What did that choice cost — in trust, in clarity, in relationship, in outcome?

Hold that in mind as you work through CLEAR and BRIDGE today. Every tool you learn is a tool for a conversation you already know you need to have.

CLEAR™: Conversation Preparation Toolkit

- C — Context:** What is the situation? Separate facts and data from assumptions.
- L — Landscape:** Who are the stakeholders? What are their priorities, pressures, and motivations? Apply the STAR® Manager Skill/Will framework. Where PI profiles are available, use them as an additional data point.
- E — Endpoint:** What does a successful outcome look like? Define the minimum acceptable result and the ideal result.
- A — Approach:** Which ETHOS phase needs the most attention? Plan your opening and 2–3 key messages.
- R — Risk:** What could go wrong? Identify emotional triggers, defensive reactions, and information gaps.

STAR® Manager Mission 17 Challenging Conversations

Challenging conversations are planned, purposeful interactions where the outcome matters and the stakes are high — performance, alignment, or relationship are all on the line.

The preparation model: define your purpose, understand the other party's perspective, plan your approach, and anticipate their reactions before entering the room.

Focus on specific behaviors and observable outcomes — not personality, assumptions, or intent. Facts and impact, not judgment.

Define the endpoint before you begin: what does a successful outcome look like? Know your minimum acceptable result and your ideal result.

Emotional self-regulation: manage your own reactions in the moment while staying genuinely curious about the other person's perspective and experience.

CLEAR is the direct evolution of Mission 17's preparation model — extended for all critical conversations regardless of relationship type or organizational level.



CLEAR Practice Exercise

Instructions

Work in pairs. Each person identifies a real critical conversation they are currently facing or anticipating.

Prepare (10 min)

Using the CLEAR worksheet, prepare your approach independently. Complete all five steps, paying particular attention to Endpoint and Risk.

Thinking Partner Coaching (10 min – 5 minutes each)

Your partner plays the role of thinking partner — asking probing questions and pressure-testing your assumptions.

Common Failures

Defaulting to vague endpoints or skipping the Risk step. These are the two most common preparation failures.

NOTES:

The BRIDGE™ Toolkit

From CLEAR™ to BRIDGE™

CLEAR — Preparation

Used **BEFORE** entering a conversation.
Answers: What am I walking into?

- Organizes your thinking
- Maps stakeholder landscape
- Defines the endpoint
- Anticipates risk

BRIDGE — Navigation

Used **DURING** a conversation.
Answers: How do I navigate what's happening right now?

- Maintains direction under pressure
- Manages emotional reactions
- Drives toward alignment
- Closes with shared commitment

BRIDGE™: In-Conversation Navigation Toolkit

B — Begin with the Issue:	State the purpose in 1–2 sentences. No preamble. Honesty starts here.
R — Read the Room:	Pause after your opening. Observe body language and tone. Adjust your pace accordingly.
I — Invite Their Perspective:	Ask an open question and genuinely listen. Do not formulate your response while they are still talking. This is where Trust is built.
D — Disclose the Full Picture:	Share data, context, and implications with Transparency. Difficult information goes here — not buried at the end.
G — Guide Toward Resolution:	Propose a path forward using “What if we...” language to open negotiation space.
E — Establish Alignment:	Confirm next steps, owners, and timeline. Restate the agreement aloud. Alignment is the close.

STAR® Manager Mission 18

TGROW Coaching Model

TGROW is a structured coaching conversation model designed to move from presenting problem to committed action – it turns dialogue into direction.

- T – Topic:** Establish what the conversation is about and build the psychological safety needed to have it honestly.
- G – Goal:** Define what success looks like from the other person's perspective, not just your own agenda.
- R – Reality:** Explore the current situation honestly – facts, perceptions, and real impact – before jumping to solutions.
- O – Options:** Generate multiple possible paths forward before committing to one. Breadth first, then depth.
- W – Will:** Convert insight into a specific, time-bound commitment. The conversation isn't complete until this step is secured. BRIDGE is the direct evolution of TGROW applied to critical cross-functional conversations.

EXERCISE



Trio of Vignettes

Break into groups of 3.

For each vignette you will play a different role.

CLEAR prep: 5 min

Role play: 10 min

Debrief: 5 min

Rinse and repeat for next vignette/role

Be prepared to discuss your learnings

NOTES:

Notes and Observations

Quality Escalation:

High-Performer Problem

Upward Challenge

The Atlas Program Crossroads

The Scenario

A fictional defense program (Atlas) has reached a critical decision point which requires coordination across three functional groups with competing priorities and resource constraints.

The Challenge

Each group has a legitimate case. No single group has authority to decide. Decathletes must deploy CLEAR and BRIDGE under realistic pressure — with incomplete information.

Two Scenario Versions

Version A: The Design Change Decision

Version B: The Quality Threshold Dispute.

Same 3-role casts, different crisis. Each pair of groups alternates between scenarios.

Atlas Stakeholder Groups

Engineering

Priority: Technical excellence and design integrity.

Pressure: Short-staffed. Change pulls two engineers from another active program.

Operations

Priority: Schedule and cost control. Design change disrupts tooling and requalification.

Pressure: Factory floor at 94% capacity. Disruption cascades into two other programs.

Program Management

Priority: Customer relationship and contract performance.

Pressure: This customer is 22% of site revenue. A competitor is actively positioning for the next contract.

Your Task

Select one role: Use CLEAR to prepare, BRIDGE to navigate.

Goal: a recommendation all three groups can align on.



Simulation Structure – 4 Phases

Phase 1 – Preparation (10 min):

Receive role cards. Complete CLEAR worksheet (5 min) then align as a team.

Phase 2 – Round 1: Team 1 Plays (15 min):

Team 1 does the simulation (Version A). Team 2 observes and scores.

Phase 3 – Switch:

Groups switch roles. No mid-simulation debrief – observers hold all notes and scores for the final debrief.

Phase 4 – Round 2: Team 2 Plays (15 min):

Team 2 does the simulation (Version B). Team 1 observes and scores.

NOTES:

Homework:

The 30-Day Conversation Challenge

Commitment

Each Decathlete commits to one critical conversation they will initiate within 30 days.

Part 1 — CLEAR Prep Sheet

Complete the CLEAR framework for your conversation. Identify the stakeholders, define the endpoint, and anticipate risks.

Part 2 — BRIDGE Plan

Map out the first 3 BRIDGE steps (Begin, Read, Invite) with specific planned language for your opening statement and initial question.

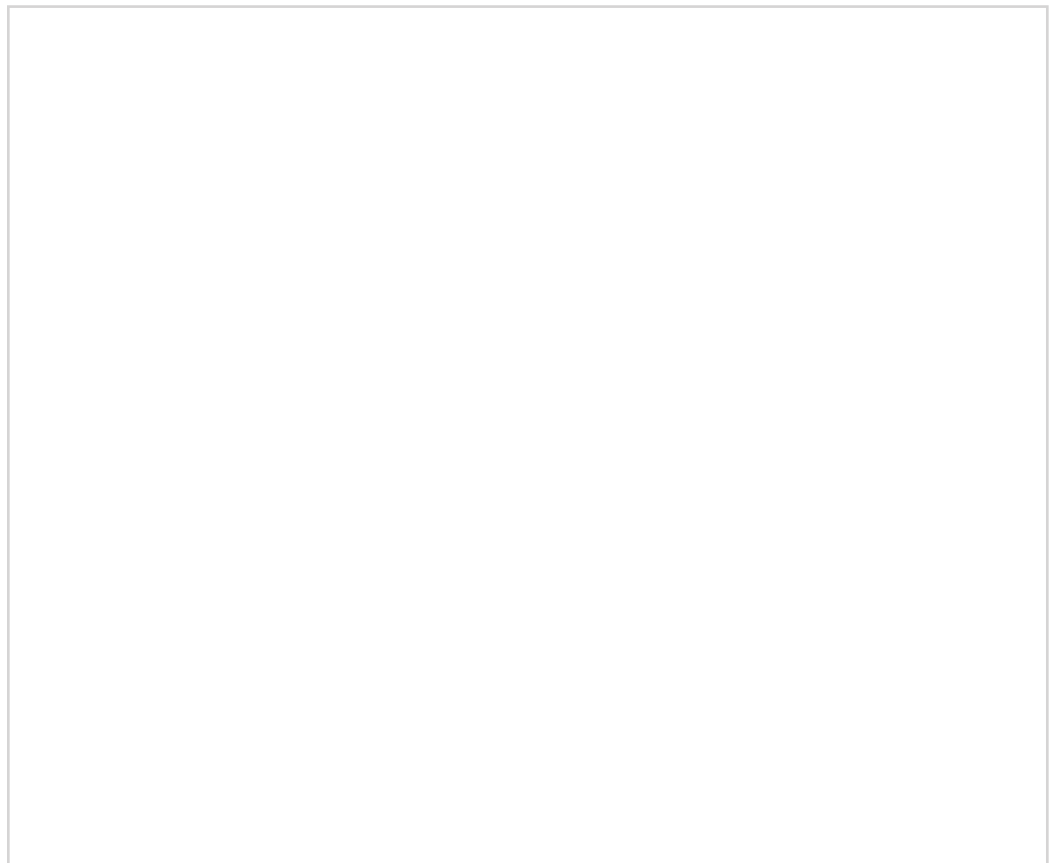
Part 3 — After-Action Reflection

After the conversation, write your reflection: What went as planned? Where did you adjust? Which ETHOS value was hardest to hold?

Note

Decathletes will present their after-action reflections at the opening of Session 9 as the homework review.

NOTES:



Accountability and Conflict

How to Create Alignment and Succeed with Difficult Conversations



Who Did it Best?

INSTRUCTIONS

Think about a time in your career when your leader effectively held you highly accountable and/or delivered some tough feedback/critique. What was **important or valuable** for you?

What would **the consequences have been** if they had not given you this feedback?

What did the leader do (and/or not do) that made that effective? What was it about the **delivery, conversation, tone, and impact** that made the feedback effective?

How did you feel about this leader, as a result?

The Data

People Want Feedback and Accountability!

- of employees want more feedback than they currently receive.
- of Gen Z are receptive to receiving feedback.
- of people believe that constructive feedback leads to improved performance, when given effectively.

Everyone wants to be held **accountable**, except your bottom performers – who you should “promote” to customer, anyway.

You can't hold people accountable if they don't know what they're responsible for. *Alignment is a prerequisite for accountability and feedback.*

Achieving Alignment & Clarity of Expectations



1. Do I understand the game?
 - What is the one goal my team is striving toward and how does that connect to broader company strategy/vision?



2. Do I understand my role?
 - What are my priorities? What are the exact things I'm responsible for?



3. Do I understand the score?
 - How are the results measured? Do I know what success looks like?



4. Do I believe the game is winnable?
 - Is what is expected achievable?



Do I Understand the Game?

Goal: Connection to broader company strategy/vision



The **outcome**: increased focus and productivity on the critical few items that make the biggest overall impact.



Do I Understand My Role?

Goal: Role clarity, prioritization



The **outcome**: no surprises. Both employee and leader are aligned on what success looks like - winning becomes more likely.



Do I Understand the Score?

Goal: Measurement and tracking success



The **outcome**: no surprises. Both employee and leader are aligned on what success looks like - winning becomes more likely.



Do I Believe the Game is Winnable?

Goal: Achievable work, appropriate resources



The **outcome**: believing in the work creates a positive cycle of motivation and momentum that benefits both the individual and the organization.

**You haven't failed if your team doesn't know the game.
The game, score, and goals can and will change.**



Scoreboard Check-in

INSTRUCTIONS

Identify one direct report you want to have this conversation with. Fill out the Scoreboard Check-in on the following page based on where you think that employee stands on the elements.

Based on those rankings, what area/s should you prioritize for your conversation. Write down when will you meet with your employee. Use the sample script below to initiate that meeting.

Sample script for requesting this meeting with your employee:

"I'd like to sit down with you to make sure you have the clarity you need to be successful here at <company name>. As your leader, it's my responsibility to ensure you're clear on what success looks like, and we'll revisit this conversation periodically to stay aligned.

In our discussion, I want to make sure we're on the same page about what the overall goals are (the game), how we measure success (the score), what your key responsibilities are (your role), and what's achievable.

Finally, I'd like your partnership in this. If at any point you feel uncertain or need more clarity in these areas, please reach out so we can talk through it together."

NOTES

SCOREBOARD Check-in

Employee to have a Scoreboard check-in with:

From observable behavior and performance, rank your employee's understanding of the four Scoreboard elements.

- 1 – Little to no understanding*
- 3 – Some understanding, could be improved*
- 5 – Exceptional understanding and clarity*

Do they understand the game?

Do they understand their role?

Do they understand the score?

Do they think the game is winnable?

Based on your ranking of each element, what area/s will you prioritize in your employee discussion as areas for improvement?

I will discuss this with my employee by this date:



The Stakes are High

INSTRUCTIONS

What are the consequences of avoiding tough conversations or delaying feedback?

Avoiding the “Dirty Yes”

- Passive-aggressive feedback
- Pervasive back-channel communication
- “The meeting after the meeting”
- Saying “yes” to their face but “no” behind their back
- Saying things to others that you aren’t saying to the person themselves (positive or negative)
- Soft-pedaling feedback



What Gets in the Way?

INSTRUCTIONS

What gets in the way of **giving feedback** or **having a difficult conversation**?

Choose to start practicing accountability and feedback.

Leaders Go First

The first step in building a feedback culture is to start by asking for feedback.

- Communicate the invitation for feedback as open and ongoing.
- Practice accepting feedback and setting a good example.
- Make it safe for your team to share feedback.
- No extra meetings required!

How to Ask for Feedback

When you say...	This means...
My goal is to continue growing and developing as a leader, and seeking candid feedback from others is an important step in that process.	You're open to feedback. You are role modeling the behavior you are encouraging in others.
One area of focus for me is _____.	Being specific is critical and provides context that makes it possible/easier to give feedback.
Can you give me feedback or think of a time when I could have been better in this area?	Being specific is critical and provides context that makes it possible/easier to give feedback.
I am interested in your opinion and suggestions.	I value your input and views. I'm curious and want to get the perspectives of others – in this case, you. I'm "open for business" on this topic. It's ok to tell me your perspective.
I want you to feel comfortable being direct with me. Please give me the unvarnished truth.	There is zero chance of retaliation. I want the truth/permission to tell the truth. The truth will help me improve.
You can share your thoughts in this way (e.g. during 1:1s, meetings).	Examples that make it clear/easier for someone to know how to share the feedback.

Sample Script: *One of my goals is to continue to grow and develop as a leader, and seeking candid feedback from others is an important step in that process. One area of focus for me is improving my communication as it relates to providing clear goals and directions even when we are facing competing priorities as a team. Can you give me any feedback or think of a time where you felt my communication was unclear or could have been better? I am very interested in your opinion and suggestions, and I want you to feel comfortable being direct with me.*

Modeling How to Receive Feedback

During:

- Active listening
- Clarifying questions
- Avoid defending, explaining, rationalizing

1 Gratitude & Acknowledgment	2 Summary	3 Action Accountability
Thank you. OR Thank you. Even though some of that was difficult to hear, I appreciate you sharing that with me and being so candid. OR Thank you. I can tell that took a lot of courage to tell me. OR Thank you. This is really important for me to hear.	What I hear you saying is ... Did I get that right?	This is important and I'd like to propose this action now... OR I am going to do X and would like your continued feedback on how I tackle this. OR I'm going to think about that and plan what to do. Can we pick this up on date/time?



Feedback - Reflection

INSTRUCTIONS

Write down one area you want to focus and improve on (a strength, development area, or communication style).

From whom do you want to seek feedback (your team, peers, or leader)?
How will you approach asking for this feedback?

How would you prefer to receive this feedback?

How will you communicate/ask for this feedback? When?

Before You Give Feedback

Check your mindset.

- Acknowledge and examine your assumptions, beliefs, emotions right NOW.
- Be a Learner (not a Judger).

Define what success looks like in this conversation.

- Discover facts.
- Deliver message.
- Agree on ownership and next steps.

When You Give Feedback

Tone

- Empathetic, we're all tricky humans
- Make it safe to discuss hard things
- Avoid the blame-game

Coaching Approach

- Let them do the work about what will change

Learner mindset (curiosity, not judgment)

- Acknowledge multiple perspectives
- Ask open questions

Getting it right looks like:

- Message clarity (did they hear and understand you?)
- Talking about the behavior, not the person
- Getting their perspective on what happened
- Asking coaching questions to create a solution together

Getting it wrong looks like:

- Accepting excuses
- Telling them what to do
- Over-owning responsibility
 - *Let the employee come up with/ implement a solution!*
- Ending the feedback without an action plan or next steps

Example Scenario

Scenario: You have directly observed that one of your direct reports has a habit of speaking over others in meetings. There has been feedback from a few team members that this often comes across as rude or overbearing. You have heard your direct report previously refer to their own behavior as a trait that is reflective of their passion and expertise.

SBII Feedback Model

Focus on behavior and concise examples using the SBII Model

- S** Situation (when it occurred)
- B** Behavior (specific behavior)
- I** Impact (results of the behavior)
- I** Intent (clarify intent)

Example: The Interrupter

Situation	I want to give you some feedback on how team meetings have been going. This morning, at the 11am team meeting...
Behavior	...I noticed you interrupted Dave and Anna several times during the meeting.
Impact	This caused some frustration and I noticed that certain team members stopped sharing their thoughts altogether. In a group setting, as a team, we need to ensure that we make space for others during conversations and meetings. It's a necessary skill for your career development, and it also helps us ensure that we are utilizing the full talents of our team.
Intent	Did you notice this happening? What are your thoughts about how you can make sure there is space for all team members to share during meetings?



SBII Feedback Model

INSTRUCTIONS

Read the scenario and use the SBII Model to create and write down your feedback. Read what you wrote to your partner and discuss the feedback you created: what you did well and what could be improved.

Scenario: During an important meeting yesterday, you and your team were making key decisions to course-correct a project that is off-track. Partway through the discussion, one of your direct reports became visibly frustrated and disengaged. They shut down and stopped participating for the rest of the meeting.

Later in the day, you followed up with them. You confirmed that nothing personal or urgent had happened. Instead, they explained that they were frustrated because the conversation—and the likely decision—was not moving in the direction they preferred.

S **Situation**
(when it occurred)

B **Behavior**
(specific behavior)

I **Impact**
(results of the behavior)

I **Intent**
(clarify intent)



Scenario 1: SBII Feedback Model

INSTRUCTIONS

Read the scenario. Write down how you would deliver the feedback using the Situation, Behavior, Impact, Intention model.

Read your feedback out loud to your partner, as if you are the leader and they are the employee. Employee, give your partner feedback on what they did well and what could be improved.

Scenario: Gatekeeping work

Several of your team members have been working for a few months on a cross-functional project. Another department leader just brought to your attention that one person from your team is demonstrating a pattern of “gatekeeping,” or protecting their work to the point that it is negatively impacting the project.

Most recently, this individual encountered a roadblock that fell within their scope of work, however, they did not share it during the project meeting report-out. Additionally, they didn’t include their current status or any updates in the shared folder in a timely manner, an expectation of every team member.

By not offering this information or following the agreed-upon channels to communicate this roadblock, other team members moved forward under incorrect assumptions, which is likely to cause avoidable issues downstream.

NOTES

SBII Feedback Model

S Situation
(when it occurred)

B Behavior
(specific behavior)

I Impact
(results of the behavior)

I Intent
(clarify intent)

Key Feedback Principles

Timing:

The 48-hour rule: How long you wait to tackle a tough conversation makes a difference. If an issue still bothers you after 24 hours, commit to addressing it within 48 hours.

Intent:

What is your goal for the conversation?
Are you being a Learner or a Judger?
Provide clarity and specificity in your feedback.

Exceptions for faster action:

- Health
- Safety
- Security
- Physical/mental wellness

Determine Actionable Steps

As part of the discussion, help the individual identify agreed-upon actionable steps toward resolution.

- What would the ideal solution need to include?
- What I like about your idea is....
- Another thought I'd like to offer is...

Clearly state the follow up.

- What will the employee do next/going forward?
- When will you discuss this again to check progress?
- What resources are needed for success?

NOTES



Determine Actionable Steps

INSTRUCTIONS

In your same pairs,

Resume your position as leader and employee, then ask 2-3 questions to determine action steps for the employee who was “gatekeeping.”

Switch roles and repeat.

NOTES

Handling Lack of Accountability

If they ...	What's happening is ...	How do you respond?
Blame others or their circumstances as a justification.	Lack of ownership. Deflecting responsibility.	Acknowledge that others or circumstances can have an impact. Reassert the goal of the conversation: what THEY can do (their role, their behaviors), going forward.
Treat the feedback as unimportant.	They don't understand how impactful this behavior/outcome is to them. (They don't see how it impacts things they care about).	Consider their Motivating Needs and reframe how this behavior IS impacting things they care about.
Assert, "That's just how I am/how I do things."	Lack of self-awareness. Resistance to change. Fear of rejection/failure.	"I'm not asking you to change who you are. I am asking you to make small adjustments in how you operate to help you be even more effective. This is an ongoing expectation for all of us."
Say nothing or give in.	Avoidance or passive resistance, disengagement, disagreement.	"I want to make sure we're aligned, not just compliant. What's your perspective on what we discussed?"
Panic. Overinflate the feedback. "Are you saying I'm bad at my job?"	Lack of perspective on the magnitude of the feedback.	"This is about one area for improvement, not a judgment on your overall performance. Let's focus on how we can strengthen that part."



“The Interrupter” Example

INSTRUCTIONS

Re-read the scenario. In your groups, craft a response to the below potential statements from the employee.

Scenario: You have directly observed that one of your direct reports has a habit of speaking over others in meetings. There has been feedback from a few team members that this often comes across as rude or overbearing. You have heard your direct report previously refer to their own behavior as a trait that is reflective of their passion and expertise.

“Well, John just talks so slow, I have to get my thoughts out before I forget my ideas.”

“The rest of the team doesn’t seem to mind.”

“That’s just who I am. I say it like it is.”

“Okay.” Is quiet and says nothing else.

Understanding Myself As Leader

	Possible Strengths	Possible Challenges
A>B	Direct, holds accountable. No sugar-coating.	Tells, doesn't coach, too blunt.
B>A	Coaches and teaches. Owns it, holds self accountable for what they need to do better as leader.	Not soon enough, not direct enough, too much personal ownership of the issue; believes they can "fix" anybody.
B>D	Strategic, big picture focus. Sees the gray, lets direct and figure out how to get there. Motivating, engaging approach.	May not be detailed and thorough enough for feedback to resonate, be fully understood, be actionable.
D>B	Structured, thorough, candid, fact-based, clear, detailed.	Too black and white, too candid, inflexible on "how" the work gets accomplished.
C>D	Views most mistakes as part of learning process, gives tons of room for employee to figure out how. Even-keeled and calm, even in very difficult circumstances.	May not be involved enough in details to know the real issues. Often has little interest in following through and up on more mundane details to ensure success. Not as interested in providing structure and process.
D>C	Clarity about deadlines, process, what "right" looks like and following up and through to ensure things are on-time and on-quality.	Can have exacting standards, be inflexible about "how" the work gets done. May view all mistakes as problems and not part of the learning and development process.

ACTIVITY

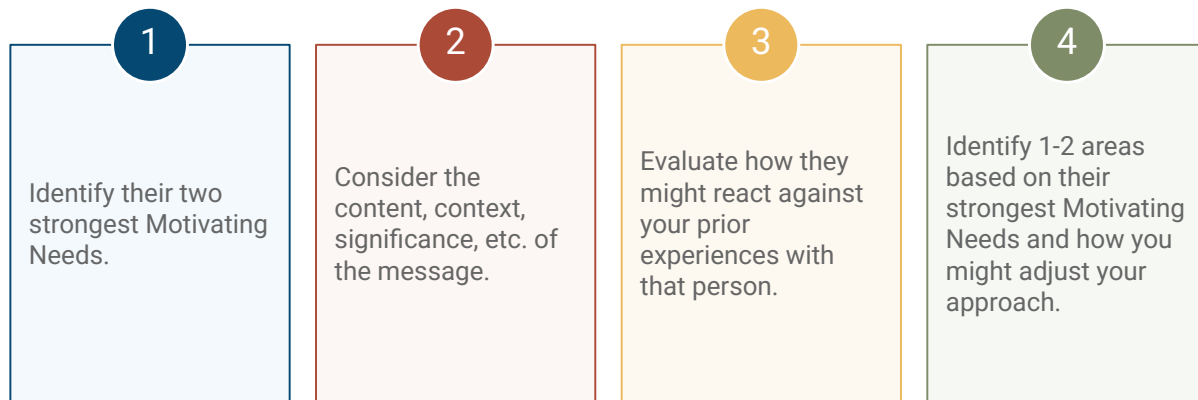


Reflecting on Your Style

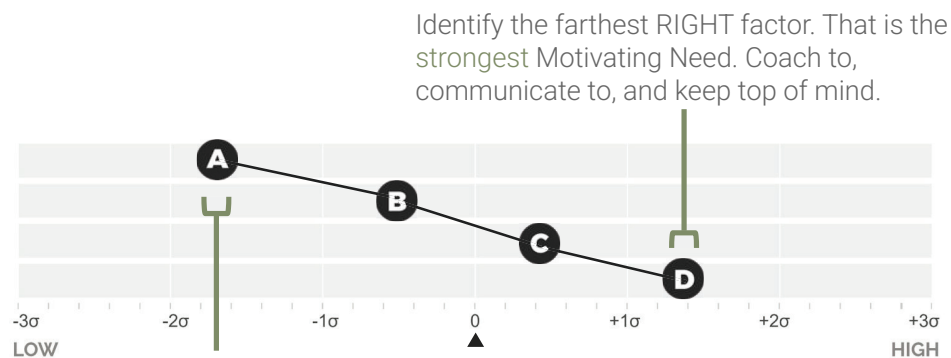
INSTRUCTIONS

Note your strongest factor combination(s) and which behaviors resonate most with you. **Write down one challenge you'd like to work on**, as a leader.

Understanding and Adjusting (to my direct report)



Identifying Motivating Needs



Predicting the Response to Feedback

LOWEST	FACTOR	HIGHEST
Gives in (even if you are wrong). Personally bruising, lowers confidence.	A Dominance	Argues with you, challenges/pushes back hard, tries to "win" the conversation, doesn't agree so won't act on the feedback.
Quiet. Needs time privately analyze and reflect before responding/fully engaging.	B Extraversion	Makes excuses, works to "save" their reputation with you or others. Feels personal. Defensive.
Doesn't listen well/thoroughly or hear the whole message. Less interested in context than action.	C Patience	Needs time to process, might question (to understand why), may be stubborn, comfortable with their habits.
May shrug it off/treat it as no big deal—especially if about details, process, structure they don't deem important.	D Formality	Crushed. Their standard is zero mistakes, ever. Emotionally devastated. Might have difficulty with proper perspective and placing appropriate context to the issue.

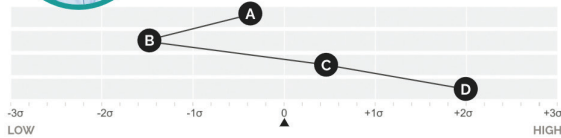
NOTES



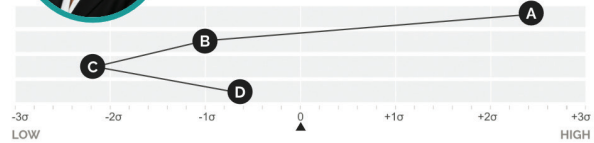
Adapting Styles



John, Bank Teller



Liz, Branch Manager



INSTRUCTIONS

Examine Liz and John's Behavioral Patterns and answer:

What are **Liz's two strongest behaviors**?

What are her **strengths and challenges** with that combo?

If Liz uses her natural style to give John feedback:

- **What might go well?**
- **What won't go well?**
- **What are the consequences?**

How to Adjust Your Delivery

LOWEST	FACTOR	HIGHEST
Give reassurance. Describe how you will help them succeed.	A Dominance	Be direct and firm. Challenge them to improve. Describe the outcomes they get for winning, consequences for losing.
Give them private time to think. Be factual, substantive. Don't sugar-coat. Facts over feelings.	B Extraversion	Reinforce their value. Reinforce your belief and confidence in them, ensure they don't think this is bigger/smaller than it is.
Focus on the action. Get to the point. Re-state your point. Make them summarize your message back to you.	C Patience	Give them time to process, think and prepare their response before getting to the plan. State the "why". Multiple conversations.
Will shrug it off—go in heavy. Discuss how this impacts their bigger picture outcomes they do care about. Let them come up with how.	D Formality	Detailed examples, depth, clarity of expectations. Provide perspective. Check in frequently. <u>Do not say "don't worry."</u>

Now that you know...

How might Liz adapt her style, based on John's needs?

What should she do or not do?

PI INSIGHTS – Giving Feedback

Employee's strongest
Motivating Needs:

Predicting the Response to Feedback

LOWEST	FACTOR	HIGHEST
Gives in (even if you are wrong). Personally bruising, lowers confidence.	A Dominance	Argues with you, challenges/pushes back hard, tries to "win" the conversation, doesn't agree so won't act on the feedback.
Quiet. Needs time privately analyze and reflect before responding/fully engaging.	B Extraversion	Makes excuses, works to "save" their reputation with you or others. Feels personal. Defensive.
Doesn't listen well/thoroughly or hear the whole message. Less interested in context than action.	C Patience	Needs time to process, might question (to understand why), may be stubborn, comfortable with their habits.
May shrug it off/treat it as no big deal—especially if about details, process, structure they don't deem important.	D Formality	Crushed. Their standard is zero mistakes, ever. Emotionally devastated. Might have difficulty with proper perspective and placing appropriate context to the issue.

Their response to
feedback (from the table):

How to Adjust Your Delivery

LOWEST	FACTOR	HIGHEST
Give reassurance. Describe how you will help them succeed.	A Dominance	Be direct and firm. Challenge them to improve. Describe the outcomes they get for winning, consequences for losing.
Give them private time to think. Be factual, substantive. Don't sugar-coat. Facts over feelings.	B Extraversion	Reinforce their value. Reinforce your belief and confidence in them, ensure they don't think this is bigger/smaller than it is.
Focus on the action. Get to the point. Re-state your point. Make them summarize your message back to you.	C Patience	Give them time to process, think and prepare their response before getting to the plan. State the "why". Multiple conversations.
Will shrug it off—go in heavy. Discuss how this impacts their bigger picture outcomes they do care about. Let them come up with how.	D Formality	Detailed examples, depth, clarity of expectations. Provide perspective. Check in frequently. <u>Do not say "don't worry."</u>

I will adapt to their needs
by (select one action):

I will specifically adjust for this feedback (**message, tone, timing, questions, other**):



Scenario 2: SBII Feedback Model

INSTRUCTIONS

Read the scenario. Using your partner's Behavioral results, identify their strongest Motivating Need.

Plan your conversation with the SBII Model on the next page.

Role play the dialogue for 10 minutes.

- How will you adapt your conversation to meet Motivating Needs?
- What questions will you ask to stay in Learner mode?
- Establish plan for action/commitment
- Give feedback to each other!

Scenario: The rumor mill

You have a team member with a tendency to get caught up in the office rumor mill. While not ideal, you had not received any formal complaints ... until today.

Recently, the company announced a merger, naturally causing concern among employees, especially related to job security. An HR Manager alerted you that they overheard your employee in the breakroom, stating, "With the merger coming, all of our jobs could be on the line, but I would be especially worried if I were Janet. I hope she's already updating her resume, she's going to need it!"

The HR Manager said that while this is not technically sharing confidential information, it is inappropriate and unprofessional. Other employees could easily perceive these claims as credible.

You need to impart to this individual the serious implications of spreading rumors or sharing confidential information.

My partner's Motivating Need

SBII Feedback Model

S Situation
(when it occurred)

B Behavior
(specific behavior)

I Impact
(results of the behavior)

I Intent
(clarify intent)



Difficult Feedback

INSTRUCTIONS:

Consider a current scenario in which you need to deliver some tough feedback/critique in a professional setting. This could be a direct report, peer, leader, etc. Use the form on the following page to prepare how you might now address this situation. Note any insights during your role play below.

NOTES:

FEEDBACK Prep Form

Employee's strongest
Motivating Needs:

Their response to feedback
(from the table):

I will adapt to their needs by
(select one action):

LOWEST	FACTOR	HIGHEST
Gives in (even if you are wrong). Personally bruising, lowers confidence.	A Dominance	Argues with you, challenges/pushes back hard, tries to "win" the conversation, doesn't agree so won't act on the feedback.
Quiet. Needs time privately analyze and reflect before responding/fully engaging.	B Extraversion	Makes excuses, works to "save" their reputation with you or others. Feels personal. Defensive.
Doesn't listen well/thoroughly or hear the whole message. Less interested in context than action.	C Patience	Needs time to process, might question (to understand why), may be stubborn, comfortable with their habits.
May shrug it off/treat it as no big deal—especially if about details, process, structure they don't deem important.	D Formality	Crushed. Their standard is zero mistakes, ever. Emotionally devastated. Might have difficulty with proper perspective and placing appropriate context to the issue.

LOWEST	FACTOR	HIGHEST
Give reassurance. Describe how you will help them succeed.	A Dominance	Be direct and firm. Challenge them to improve. Describe the outcomes they get for winning, consequences for losing.
Give them private time to think. Be factual, substantive. Don't sugar-coat. Facts over feelings.	B Extraversion	Reinforce their value. Reinforce your belief and confidence in them, ensure they don't think this is bigger/smaller than it is.
Focus on the action. Get to the point. Re-state your point. Make them summarize your message back to you.	C Patience	Give them time to process, think and prepare their response before getting to the plan. State the "why". Multiple conversations.
Will shrug it off—go in heavy. Discuss how this impacts their bigger picture outcomes they do care about. Let them come up with how.	D Formality	Detailed examples, depth, clarity of expectations. Provide perspective. Check in frequently. <i>Do not say "don't worry."</i>

I will specifically adjust
for this feedback
(**message, tone, timing,**
questions, other):

S **Situation**
(when it occurred)

B **Behavior**
(specific behavior)

I **Impact**
(results of the behavior)

I **Intent**
(clarify intent)



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:

