



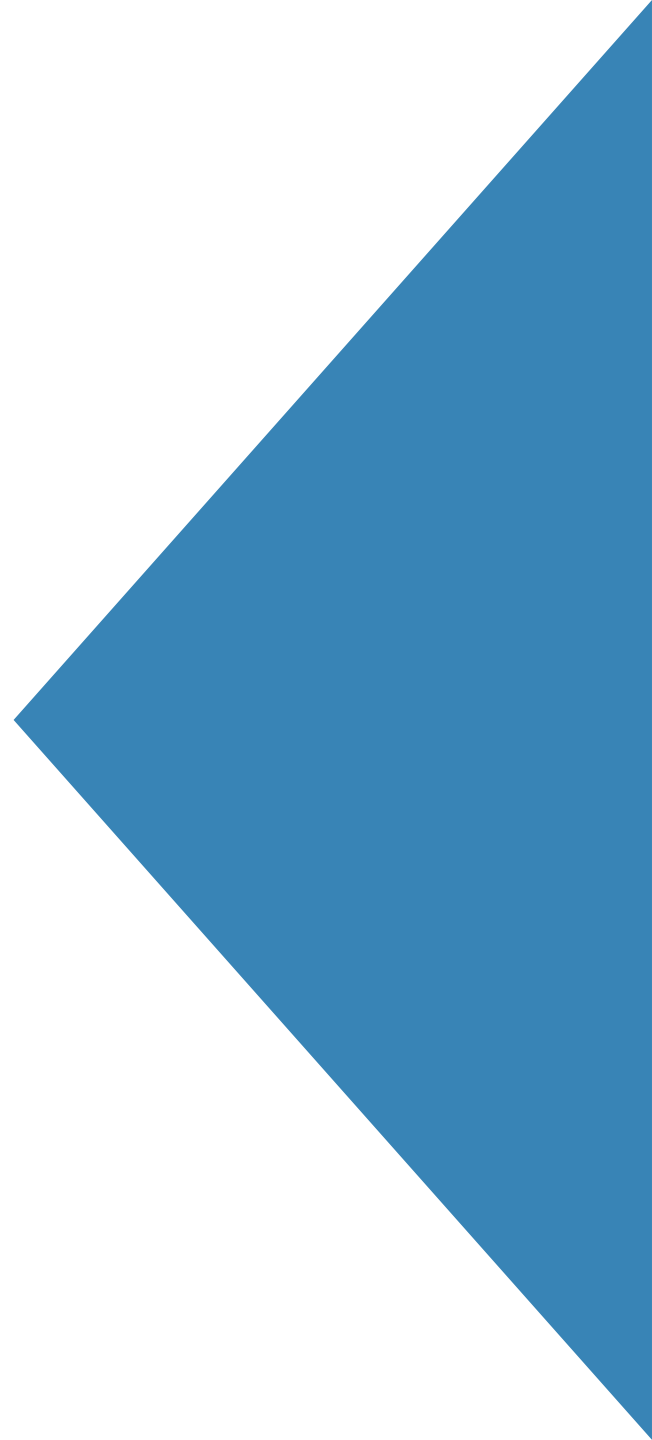
Module 4- Day 1



Reflection:

- **What would make today great?**
- **What are 3 things you are grateful for?**

Breakouts



5 MINUTE JOURNAL



Start Your Morning Focusing on the Good

The Five Minute Journal App asks you three morning questions designed to instill gratitude, set purpose for your day, and create empowering beliefs. When you start your morning off on the right foot, days seem to go by smoother.

End Your Day with Reflection

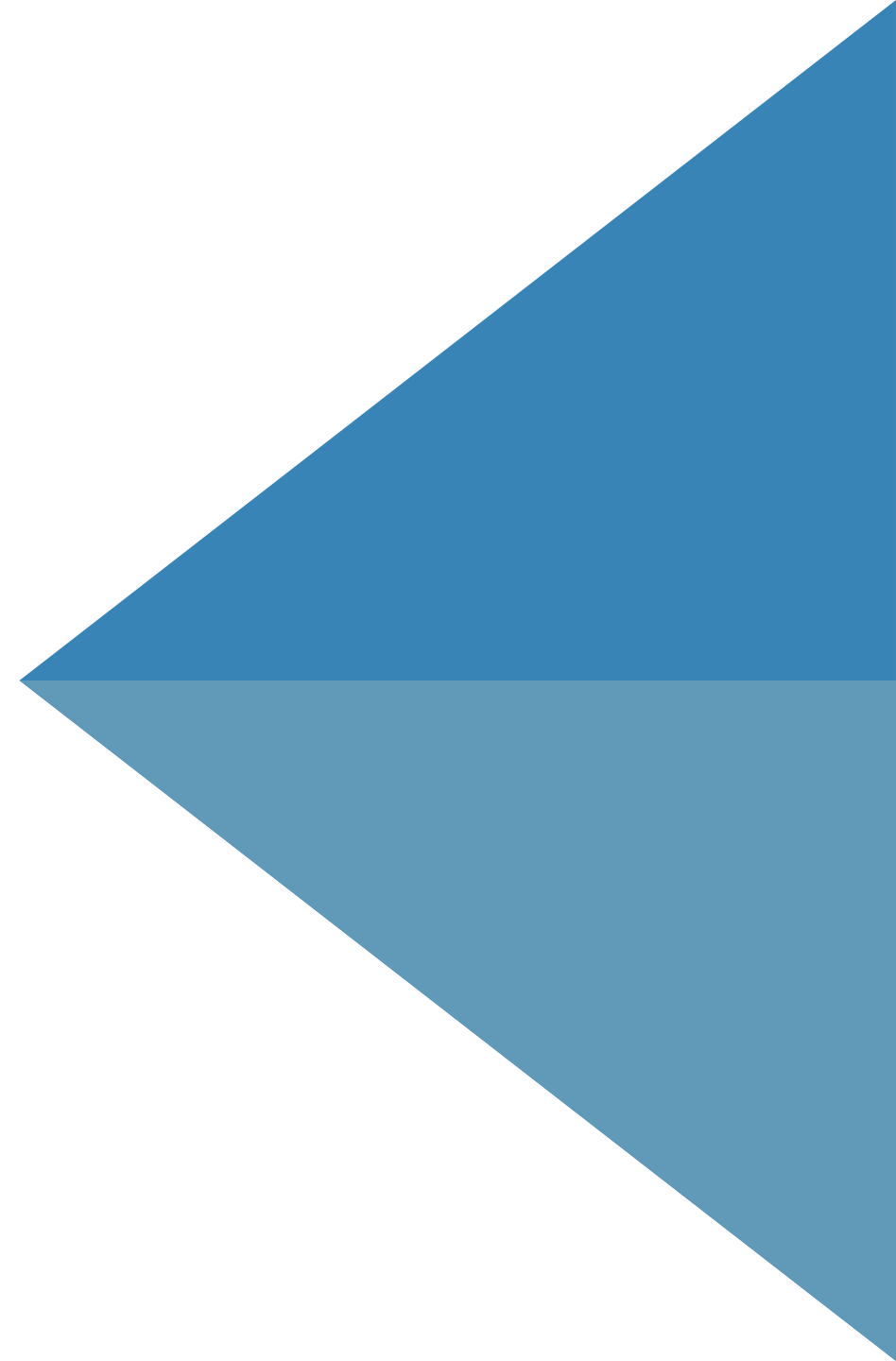
At the end of the day, two night questions ask you to reflect on the amazing things that happened throughout your day and how you could improve for tomorrow. Sleep easier ending your day on a high note.



**What would make today great?
I am grateful for...
3 Amazing things that happened today...**

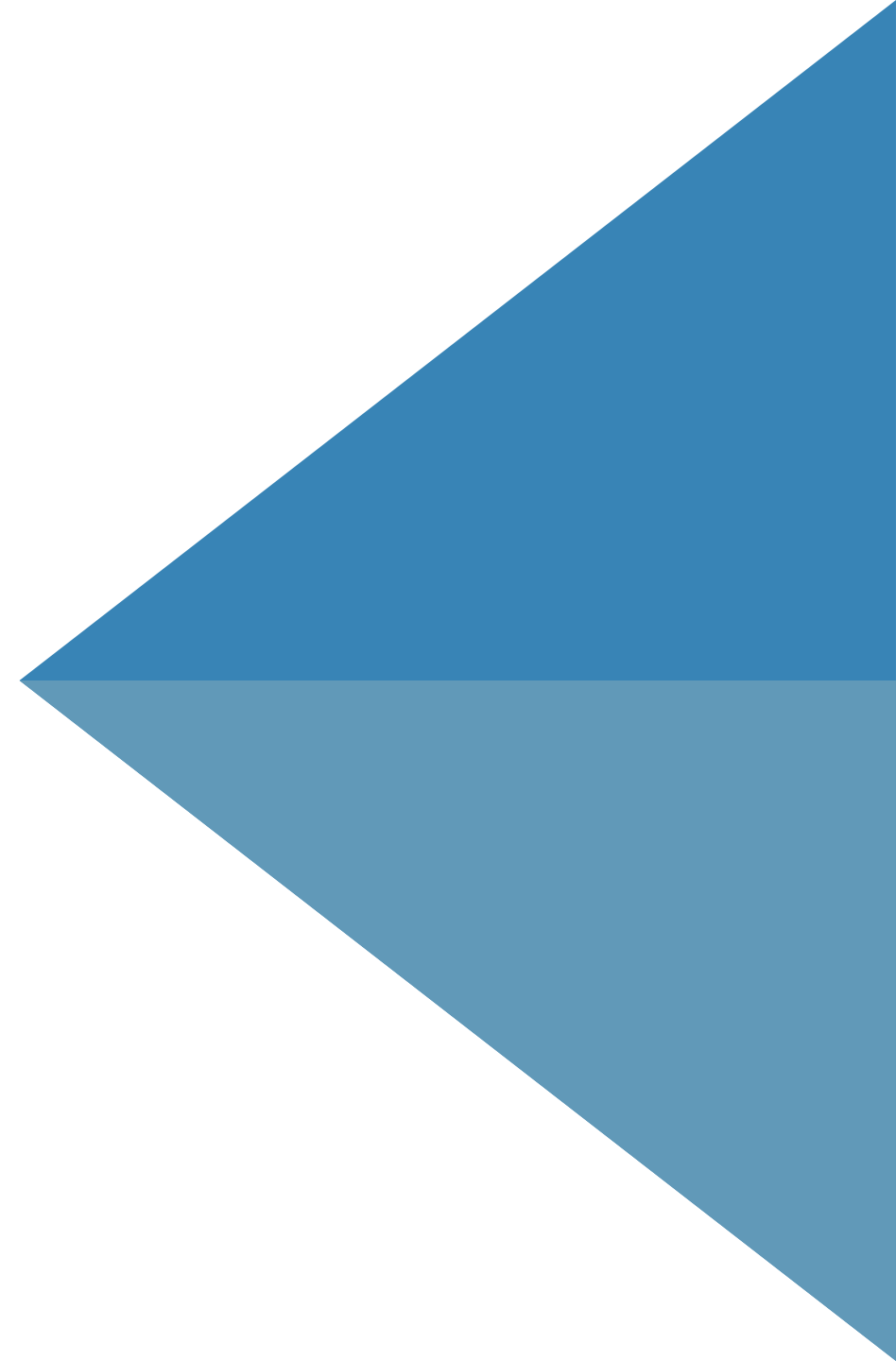
Reasons for Coaching

- **Professional & Personal Growth**
- **Assessment Debrief**



Assessment Debrief

- **One & Done**
- **Multiple Sessions**
- **Using assessment as tool to support coaching engagement**



Guide to Debrief

EQ Feedback/Debrief Session Approach GUIDE

(Sample only)

Before Session (if possible)

Client should have a familiarity with EQ-i model (introduction to model through group program, EQ Workbook or web-based application)

During Session

Set Expectations for session—for you and the client

We have an hour together and, in that hour, I want to be sure you understand the data available in your EQ-i report, ensure you understand how to interpret your results, and lastly, I want to help you identify where you may want to consider taking some next steps.

Given we all have room to grow and develop, I would like to identify where that may be for you from an EQ perspective—putting insight into action.

We will not be talking about each individual element found within the model—and we need not do so. Growth and development do not mean taking on the entire model, that would be too much. Rather, we are going to focus in on a few areas—and I will be asking you some questions throughout our time to help uncover where those might be.

Describe what emotional intelligence is- and - Why it matters.

Emotional intelligence is our behavioral face. It's what it looks like, it's what it sounds like, it's what it feels like when we show up in engage with the world around us. It's the choices we make: emotional, attitudinal and behavioral choices. and those choices have everything to do with how effectively we understand ourselves, how well we communicate who we are, how effectively we work to build relationships and understand others, and the choices have everything to do with our ability to make decisions in cope and manage with what life will invariably throw our way, stress.

Describe what the EQ-i assessment is and - What it is NOT (be sure the client understands what is being assessed).

Refer to page 2 and leverage the model for speaking points, if beneficial.

The EQi is an assessment that was developed to capture and to quantify our connection and engagement with 16 different elements of social emotional functioning. That quantification helps us better understand how easy it is for us to step in and use a space or how difficult that might be. The EQ i will yield results that are not static, in fact, these results will change for a couple of reasons: because growth work is being done and, or life happens and will influence the results.

Review concept of Scores—what the scores mean and what they don't mean.

BE SURE TO SHOW HAPPINESS SCORE

Use language like

"scores suggest" . . .
"scores help us understand how easy (or difficult) it is for you to step into each element" . . .
"scores illuminate connection and engagement with the emotions, the behaviors, the attitudes associated with each of the elements" . . .
"What might it look like if you were to step more into this space? How might that contribute to your success?"

Questions to begin session—Statements that invite more exploration/observations and initiate actionable steps

- I. **Ask** if there are any surprises once they have looked at results. Anything that stands out? Ask if there is anywhere they would like to start
- II. **Ask:** "Which of these elements do you believe most contribute to your success and which of these are most getting in your way/holding you back?" **Why? Tell me more.**
- III. **Prompt discussion:** You can always say, "I have a few questions and observations after looking at your results, are you comfortable with my sharing them?"
- IV. **Lead** client from INSIGHT to ACTION...help the client identify several elements where he/she can take actionable next steps (and help them identify what those actionable next steps may be)
- V. **Explain** the pieces and parts of the report for them to digest page 99 their own.

After Session (as appropriate)

Sample Email:

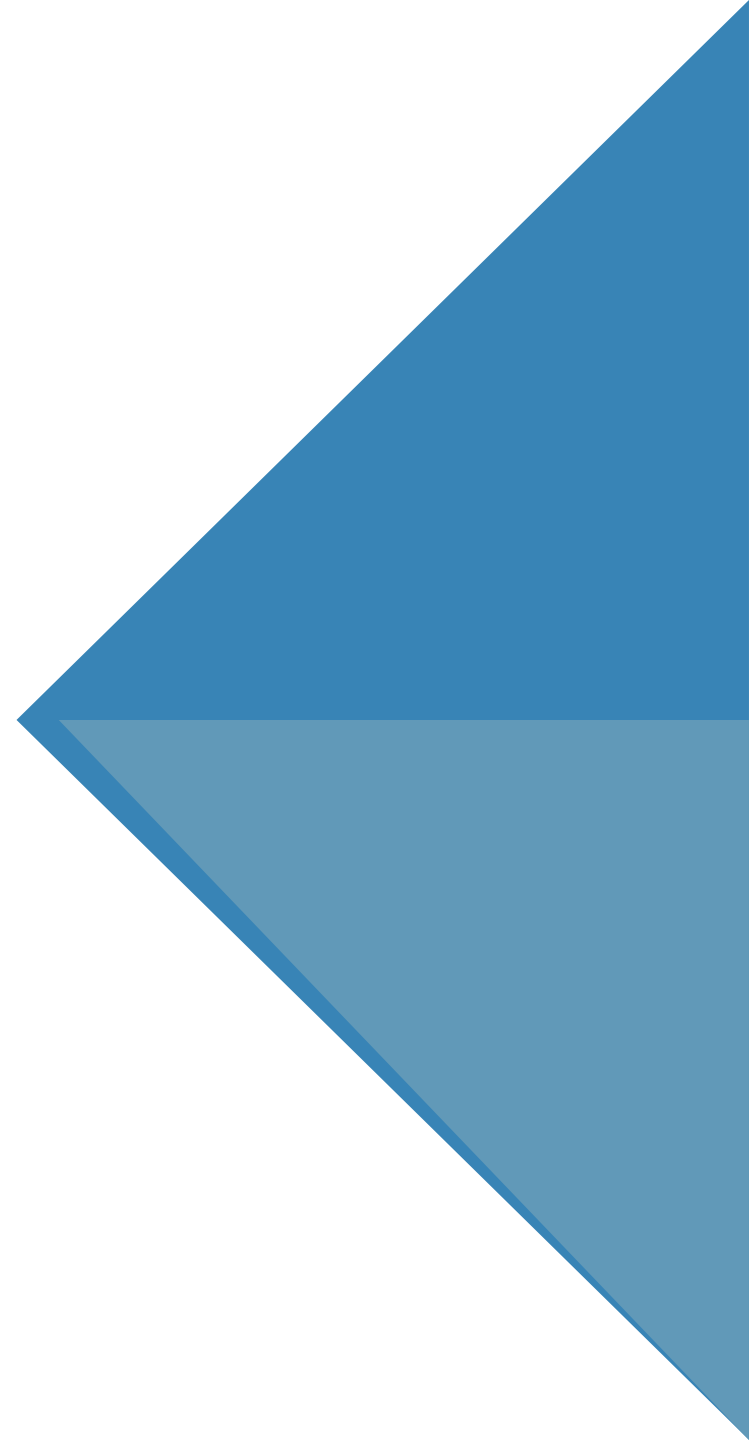
As a follow-up to our recent session, I am providing the materials we discussed.

To supplement your development resources, the attached _____ is an article/ted talk/author etc that I hope you find of value.

ABC

XYZ

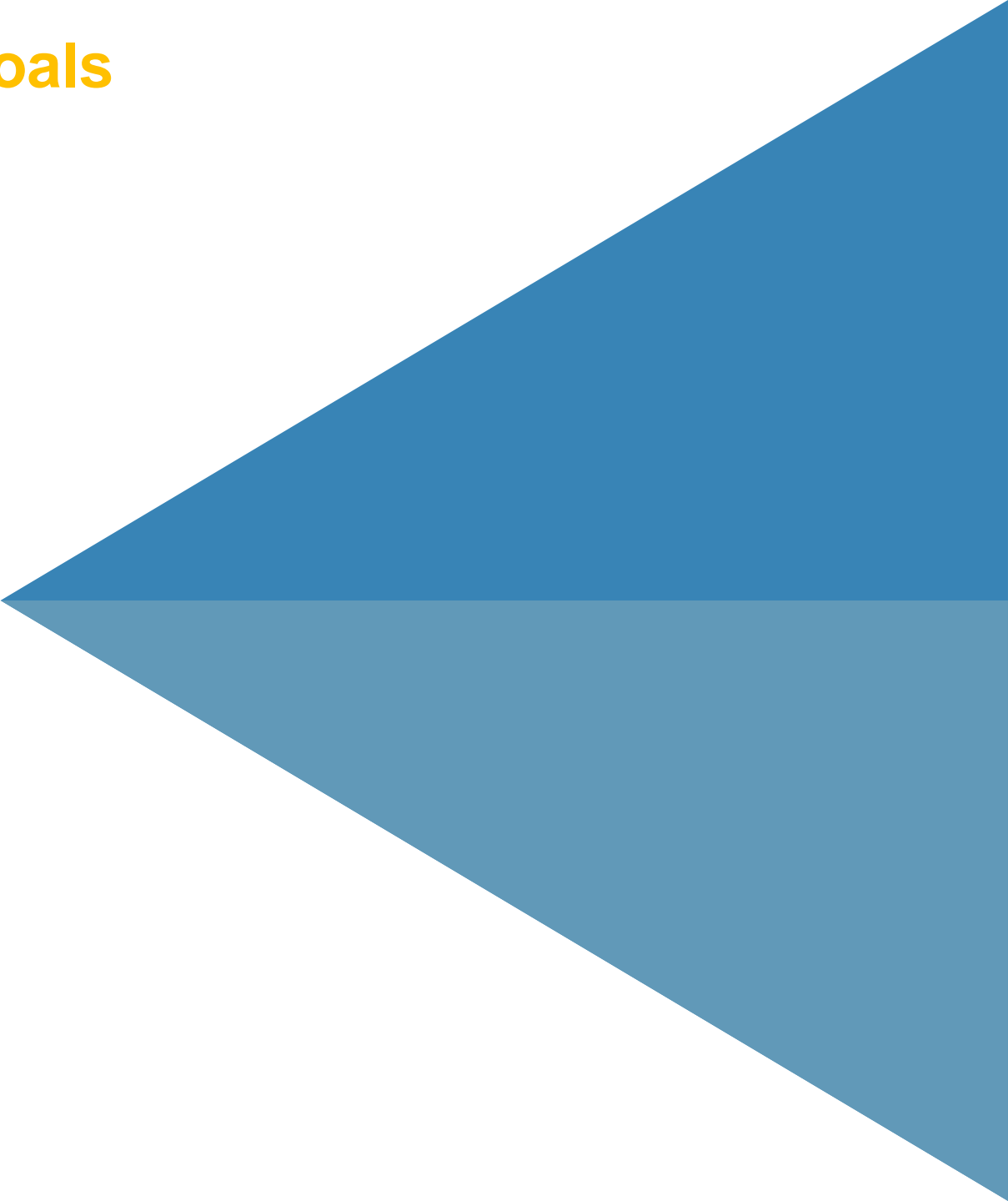
Coaching for GROWTH (entire engagement)



Coaching for GROWTH : ICF Competencies

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
- **Asks what makes achieving this goal important to the client**
- **Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish during coaching engagement**
- **Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement**

Coaching for GROWTH: No Clear Goals

- **Can use assessments to illuminate data that can help client identify**
 - **Can use questions or feedback from others to help client define areas**
 - **Can use other tools to narrow focus**
- 

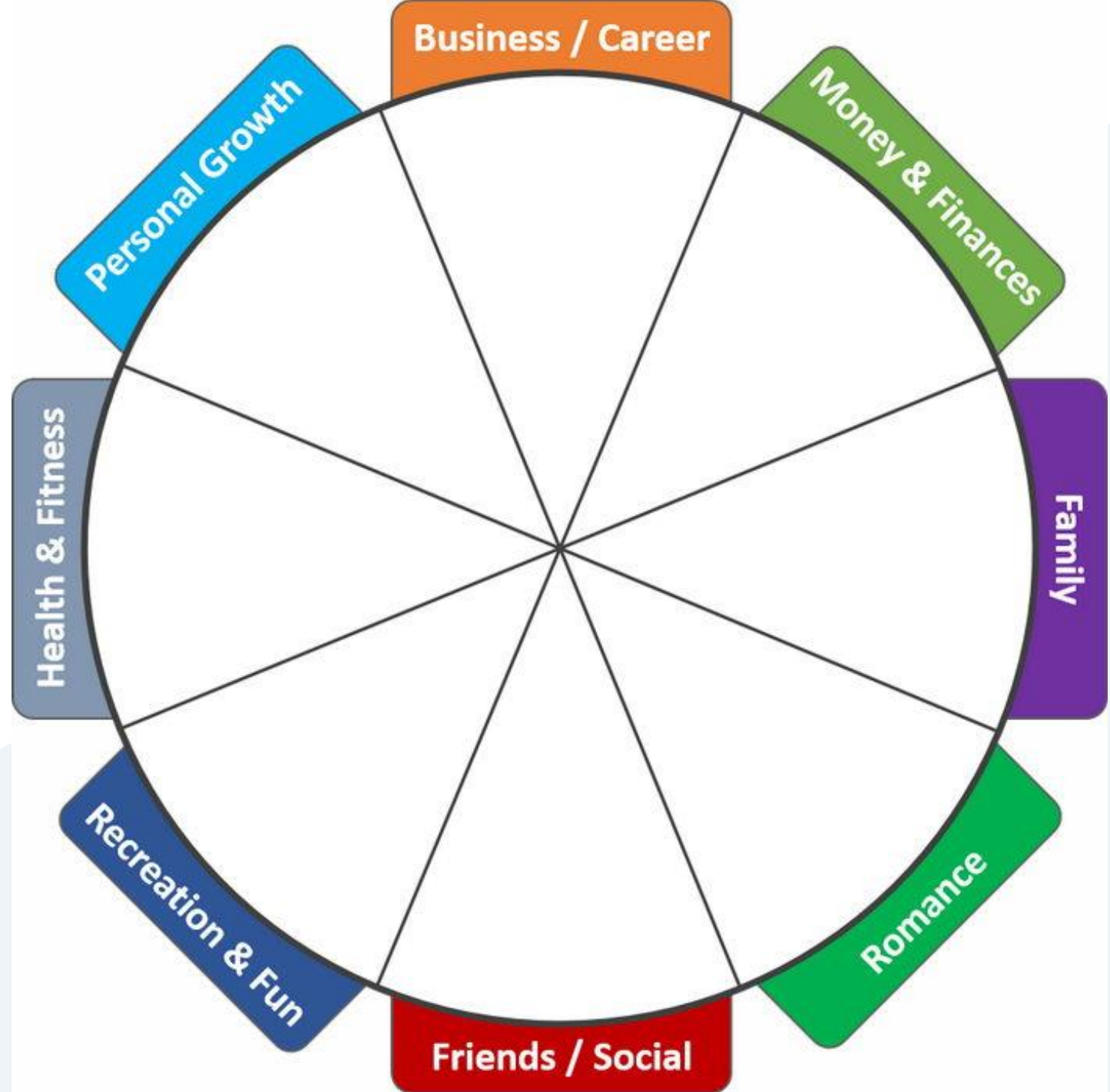
Coaching for GROWTH (entire engagement)

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
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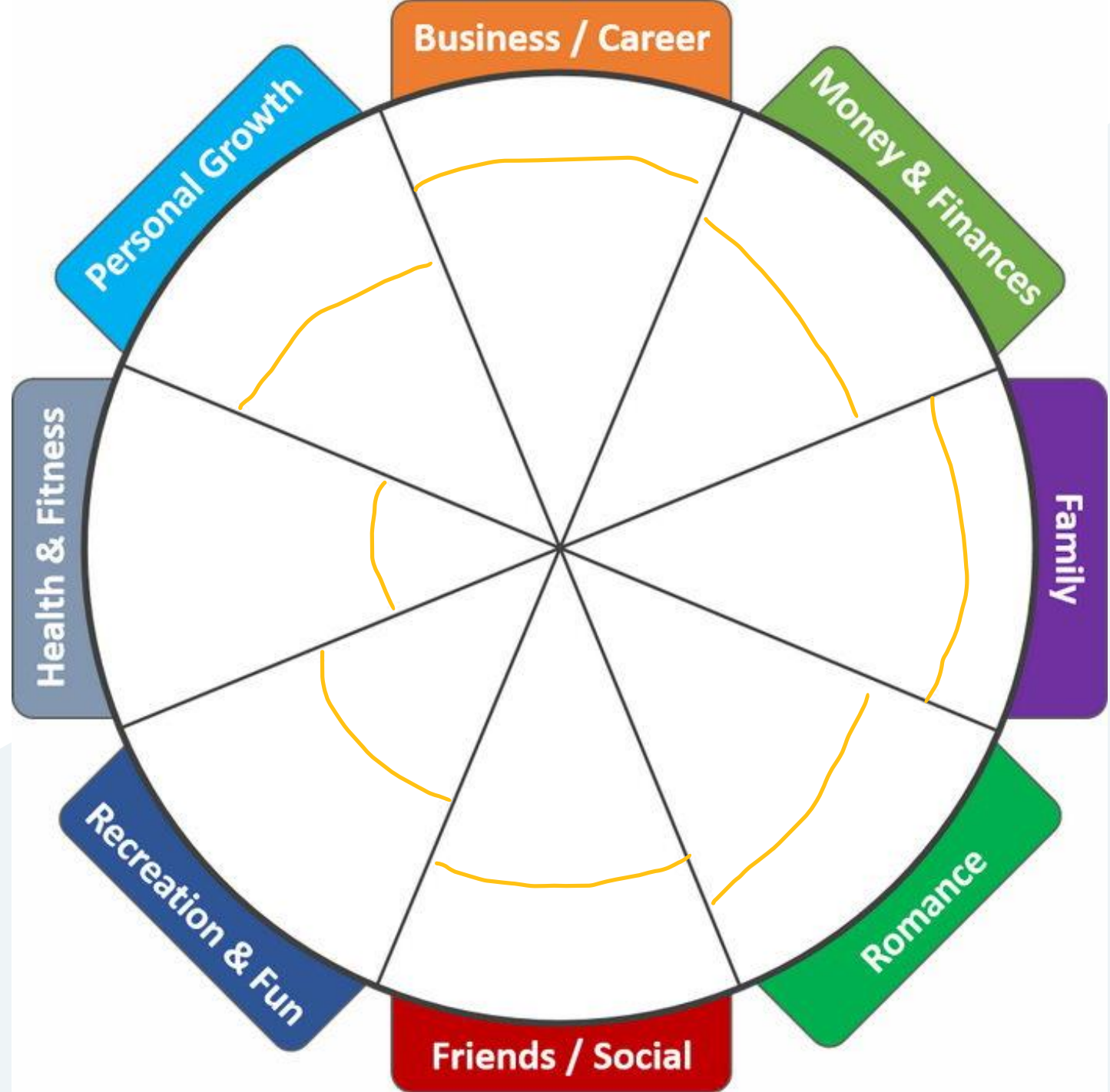
Wheel of Life

Rank your level of satisfaction with each area of your life by drawing a curved line across each segment.

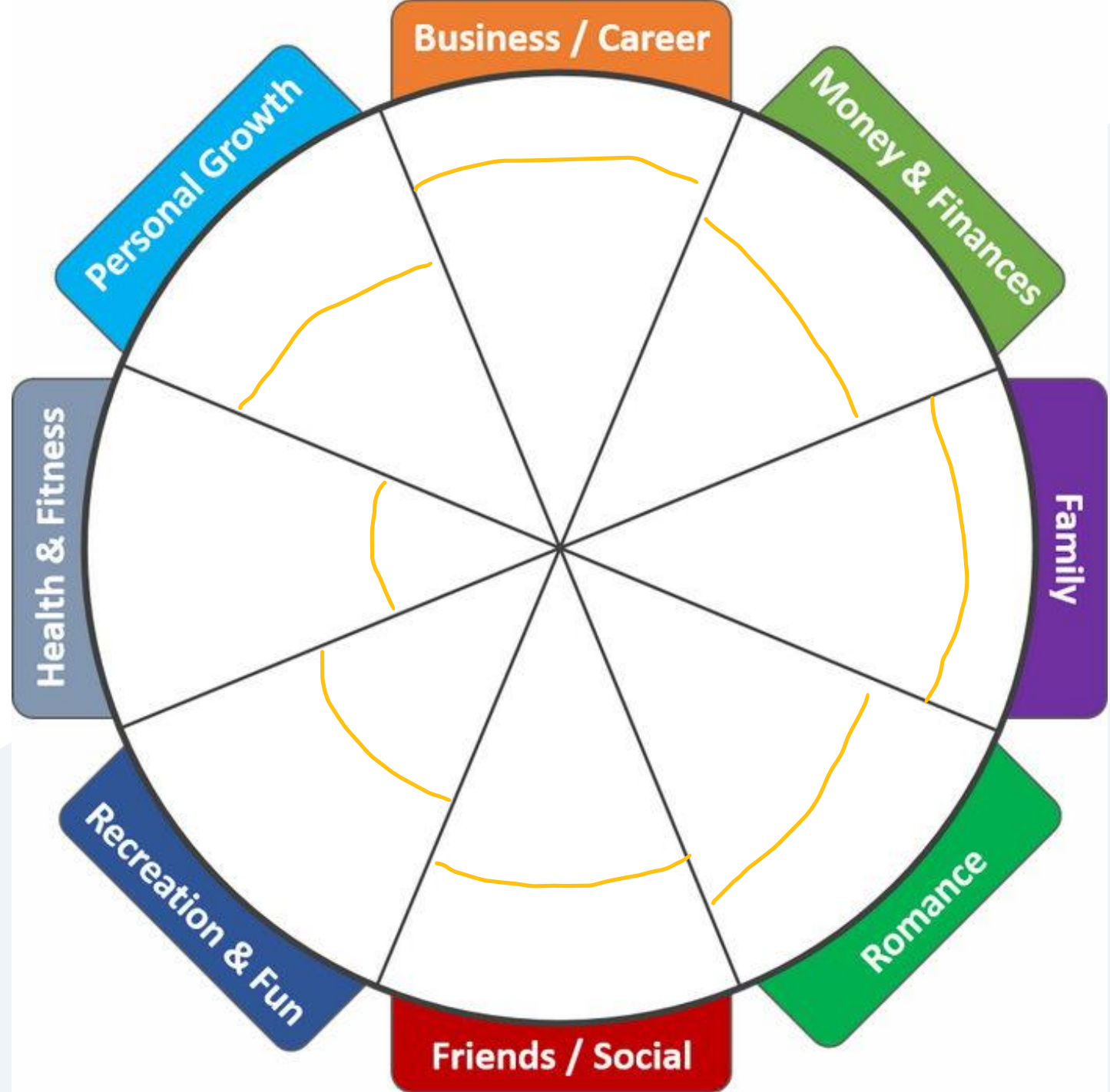
The closer to the center your line (very dissatisfied) and outer rim (fully satisfied).



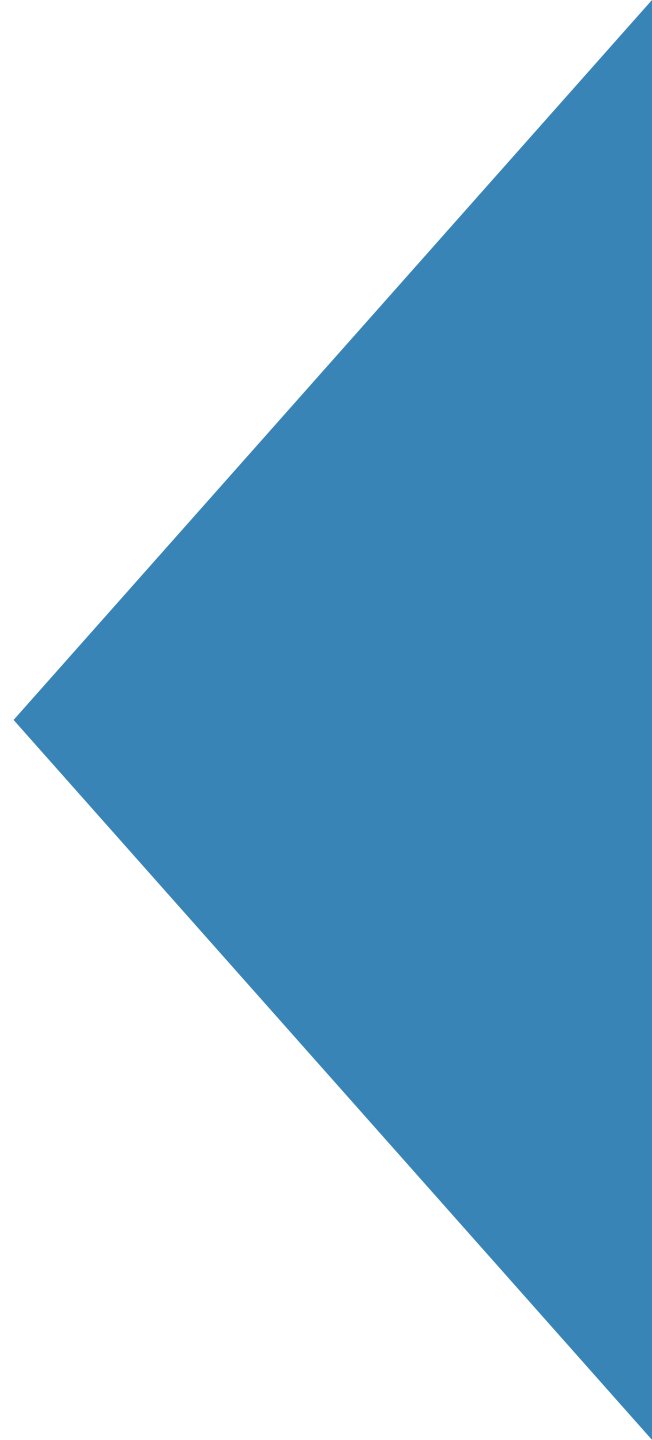
Wheel of Life



Wheel of Life



Breakouts

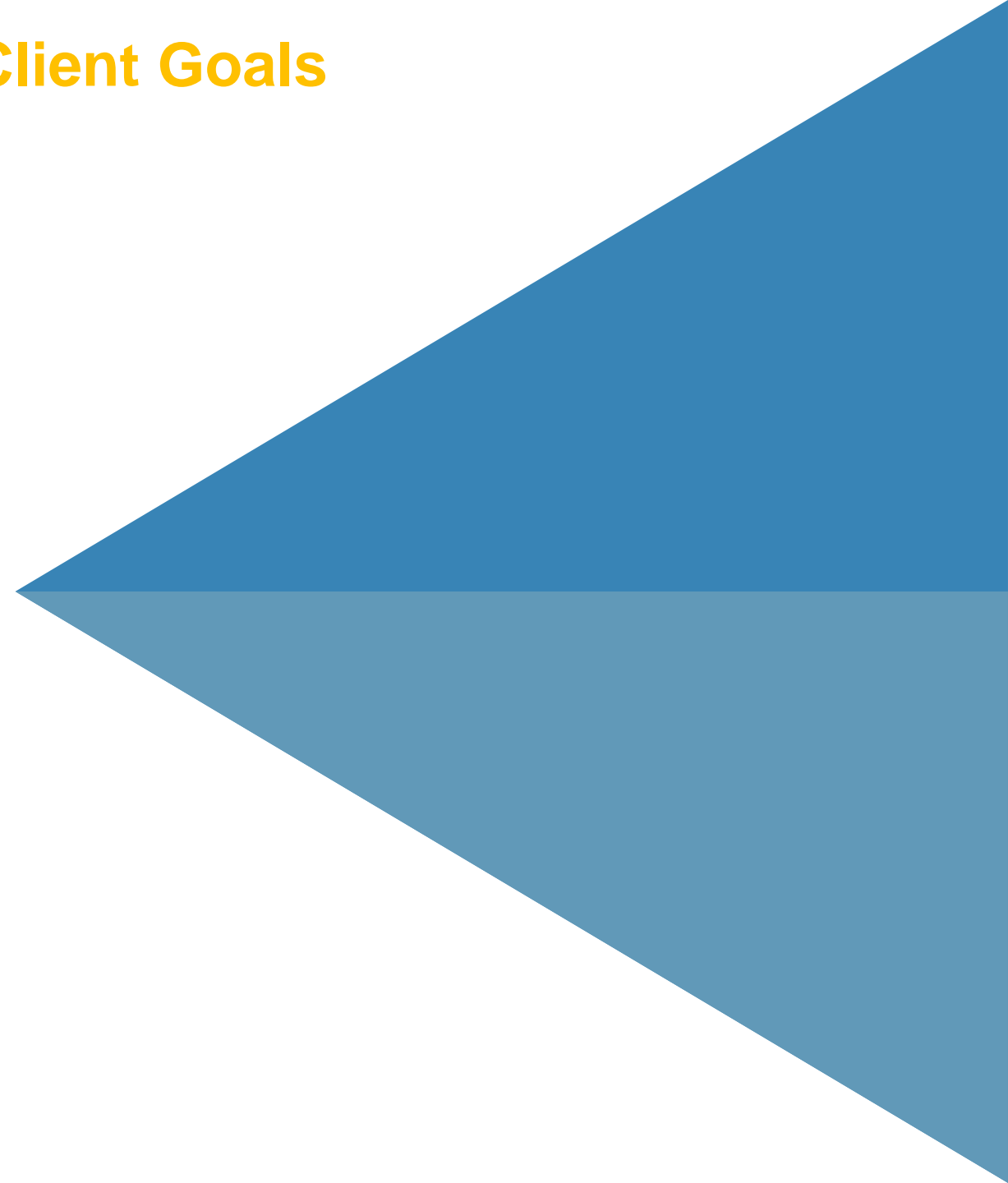


Coaching for GROWTH (entire engagement)

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
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Coaching for GROWTH: Common Client Goals

- **Managing Change**
- **Communication**
- **Stress Management**
- **Conflict Management**
- **Succession Planning**
- **New Role Transition**
- **Decision Making**
- **Work/Life Balance**




Coaching for GROWTH: Common Goals

Hi Bob, Harris, and Jenifer – Sorry for the delay in connecting you all. Per below, we have paid the invoice to initiate coaching between Jenifer Sanders and Bob Smith. As a reminder, here is what Bob had originally identified as goals:

Coaching goals:

- 1. Primarily I'd like to better hone emotional intelligence. I'm self-aware enough to know that, at times, I can fall prey to myself and not articulate as well because of that failure to disconnect.*
- 2. Secondarily, I could use some work on human connections such as handling those who may be naturally averse to my personality type.*

Jenifer and Bob, hoping that you will take it from you to connect! Please let me know if anything else is needed to initiate the coaching relationship. Otherwise, I do not need to be included in any emails, unless there is a challenge that needs my attention.



Coaching for GROWTH: Common Goals

Reasons for Participation

What are your reasons for participating in the program?

I am assuming new responsibilities at the Board, including a new section, and would like to ensure success.

What is/are the driver(s) or need for coaching?

I would like to continue to grow in my career and broaden my leadership skills, and could use some advice on how to do it.

How will this coaching engagement align with your overall development?

It would support me in leading and supporting the groups I work with. FS is at a turning point in its evolution and I want to ensure success.

What competencies are you targeting? *(Select all that apply)*

- | | | | |
|--|--|---|---------------------------------|
| <input type="checkbox"/> Collaborative Relationships | <input checked="" type="checkbox"/> Drive for Excellence | <input type="checkbox"/> Learning Agility | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Decision Quality | <input type="checkbox"/> Effective Communication | <input checked="" type="checkbox"/> Perspective and Strategic Ability | |

Coaching for GROWTH: Common Goals

Expected Program Outcomes

What does success look like and what do you want to accomplish?

Broadening leadership presence and building teams to perform at highest level.

How soon do you want to see change? Success?

Six months to a year.

How will you measure success? *(Select all that apply)*

Money:

- Cost Savings
- Expenses
- Waste Reduction
- Other

Time:

- Cycle Time
- Decisionmaking
- Other

Quantity:

- Customer Satisfaction
- Productivity
- Retention
- Turnover
- Other

Quality:

- Decisionmaking
- Effectiveness
- Efficiency
- Other
- Engagement Manager Index
- Mentoring Capacity/Ability
- Sustained Leadership Performance

Coaching for GROWTH (entire engagement)

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
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Engagement Design Phase



Creating a Tailored Workout Plan

Your trainer will create a personalized workout plan that is unique to your goals and fitness level.



Choosing Exercises and Equipment

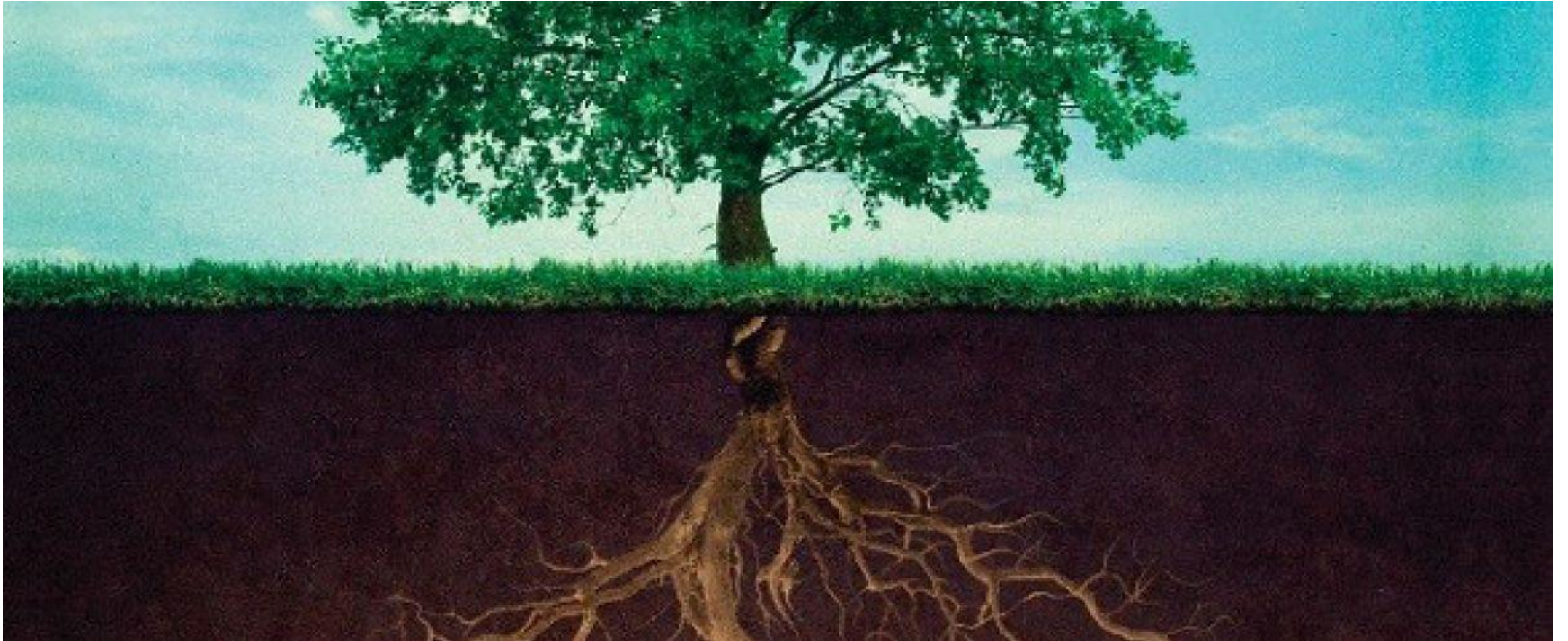
Based on your goals and preferences, your trainer will select exercises and equipment that allow you to reach your full potential.



Scheduling and Pacing Workouts

Your trainer will help you schedule your workouts to maximize results while minimizing injury risk. They will also ensure that your workouts progress at an appropriate pace.

Getting to the ROOT(s)



7 Levels Deep Exercise

By going through all seven levels, you'll uncover your true "why," which will be the driving force that allows you to accomplish anything in life.

LEVEL 1

What is important to you about becoming successful?

LEVEL 2

What is it important for you to do?

Enter your answer from the above box here.

LEVEL 3

What is it important for you to feel?

Enter your answer from the above box here.

LEVEL 4

What is it important for you to think?

Enter your answer from the above box here.

LEVEL 5

What is it important for you to believe?

Enter your answer from the above box here.

LEVEL 6

Specifically what is it important for you to do?

Enter your answer from the above box here.

LEVEL 7

Getting to the ROOT

What is important to you about becoming successful?

Make more money.

LEVEL 2

What is it important for you to make more money ?

Enter your answer from the above box here.

Get out of debt.

LEVEL 3

What is it important for you to get out of debt ?

Enter your answer from the above box here.

Stop working so hard to pay someone else.

LEVEL 4

What is it important for you to stop working so hard... ?

Enter your answer from the above box here.

Because I want to do things in my life with the fruits of my labor

LEVEL 5

What is it important for you to do things in your life... ?

Enter your answer from the above box here.

To take care of my mother who is widowed and needs help.

LEVEL 6

Specifically, what is it important for you to do?

take care of your mother

Enter your answer from the above box here.

Because she sacrificed everything to send me to college and I want to make sure she is taken care of in her Golden years

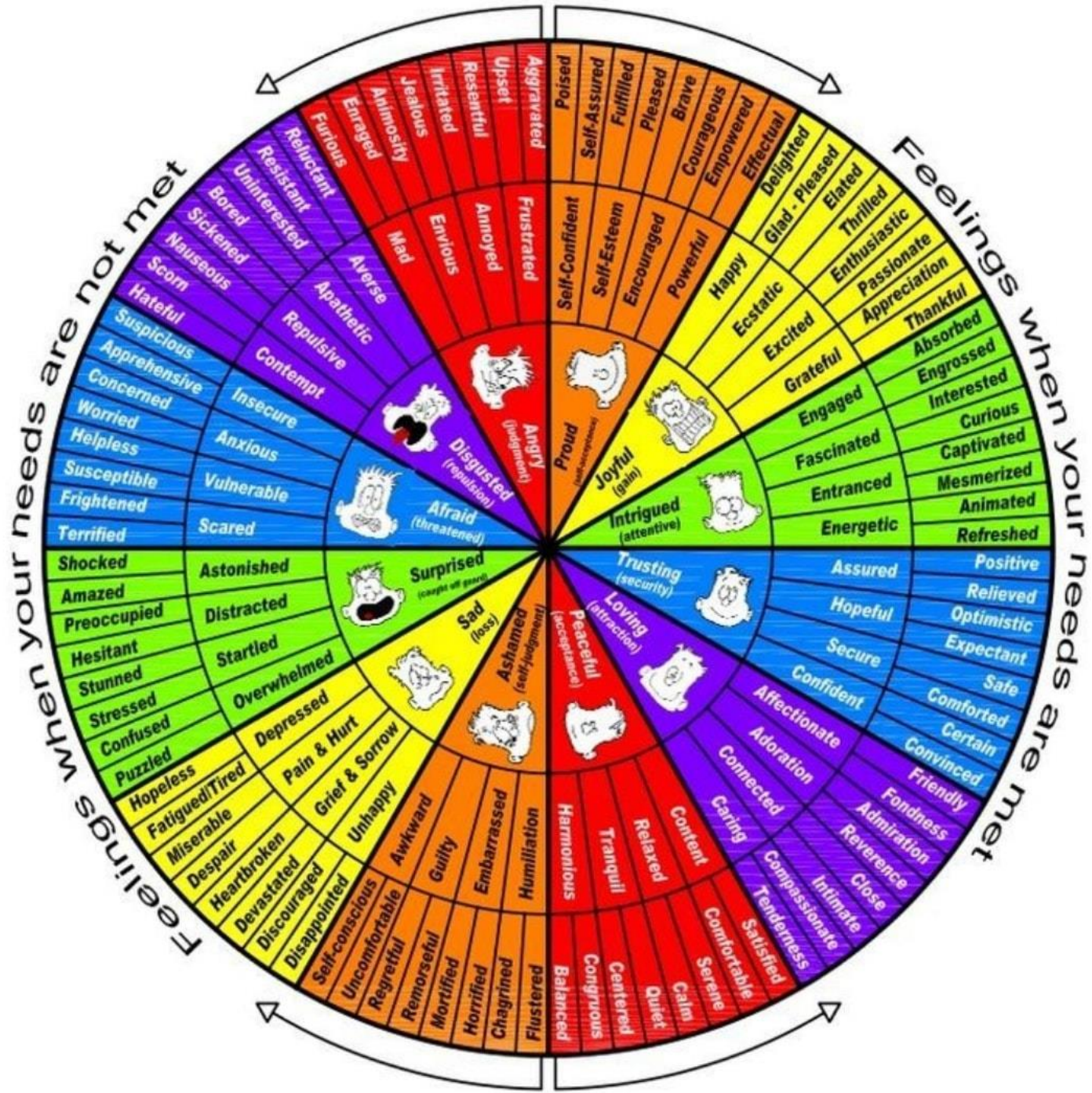
LEVEL 7 What is it important for you to

Enter your answer from the above box here. ?

take care of her

Because I want to be in control of my life so I can help those around me (who can't help themselves) know they are precious, worthy, and loved.

7 Whys (Whats)





the what

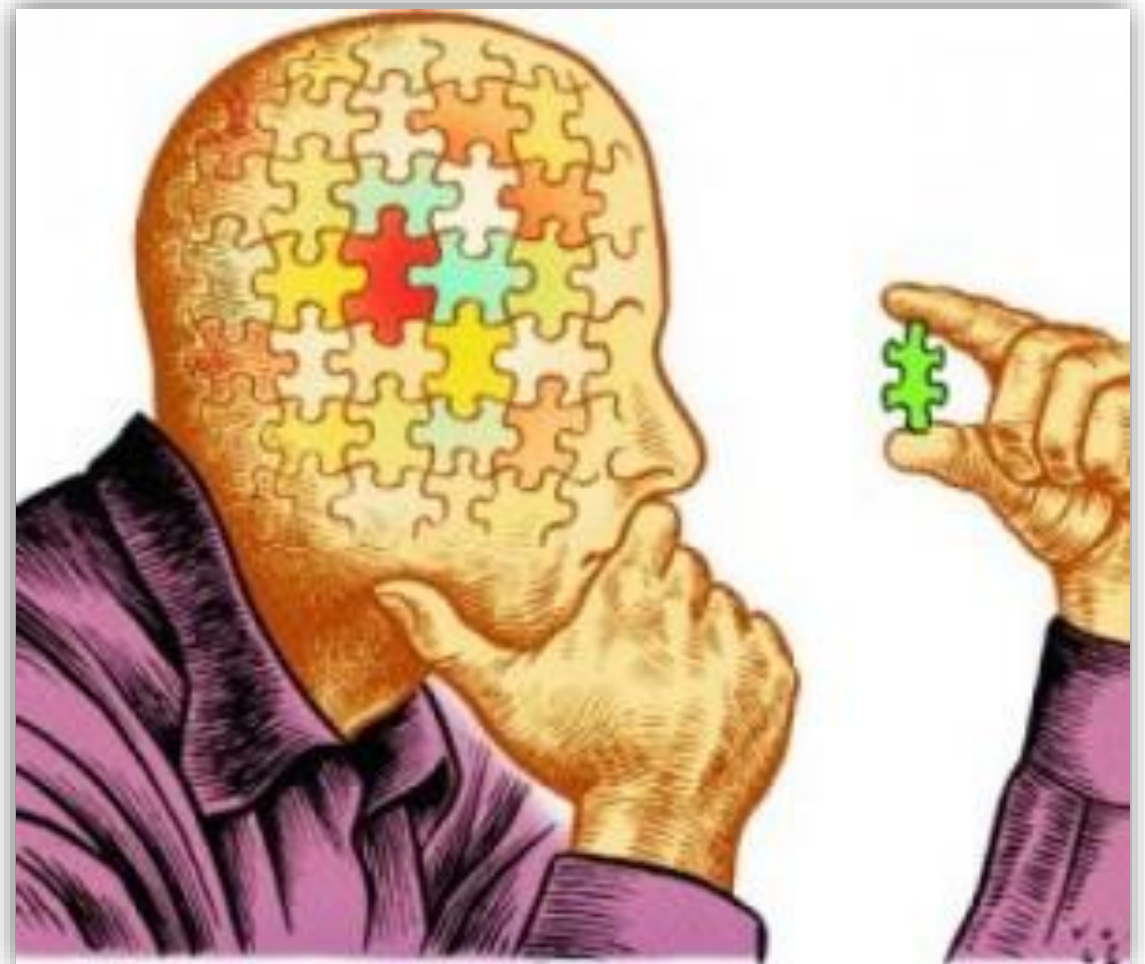
and the why


Understanding *why* you feel *what*
you feel

To fully understand the what, we must get to the why. Then the
HOW.

Debate. Dispute. Examine .Explore.

Be curious. Be honest. Peel back the onion.





**Are there
other forces
shaping how I
feel?**





Are there any other explanations for what I am feeling?

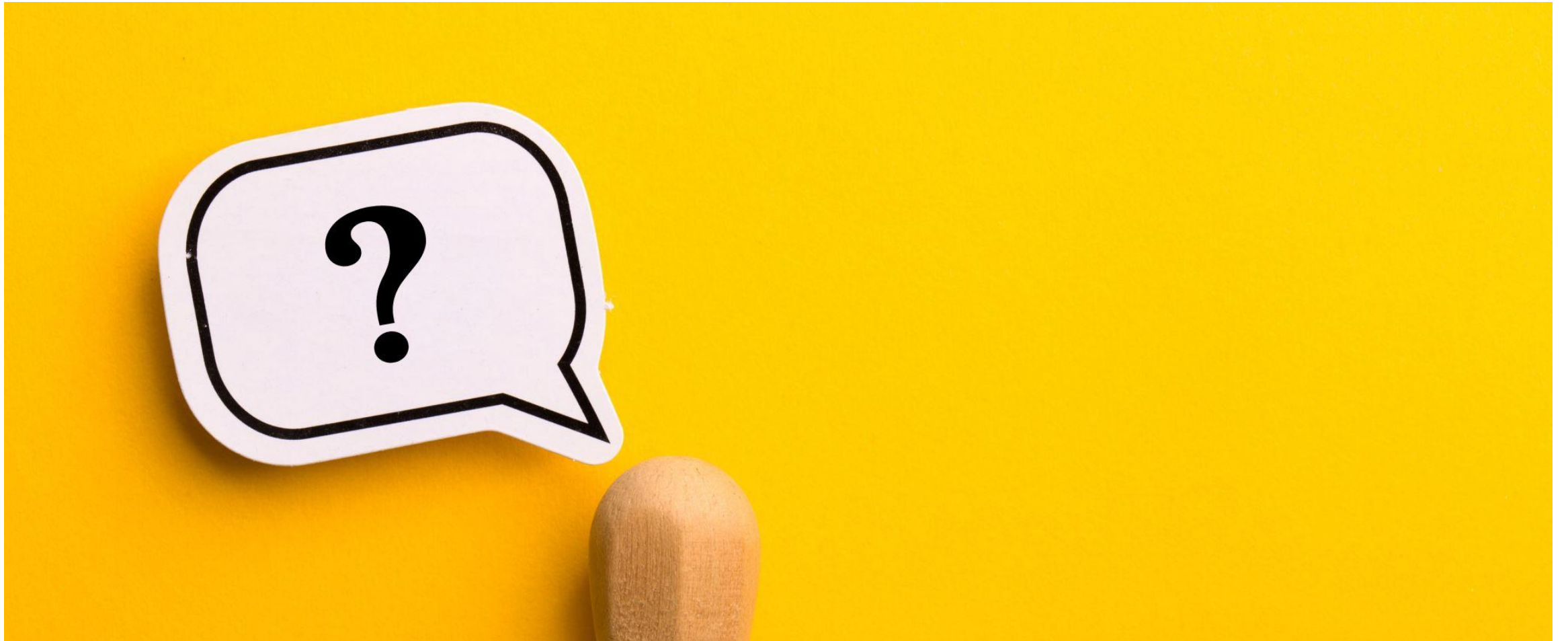
If someone shared this “why” with me, would I see it differently?



Where may this emotion be rooted?



What does this say about ME?



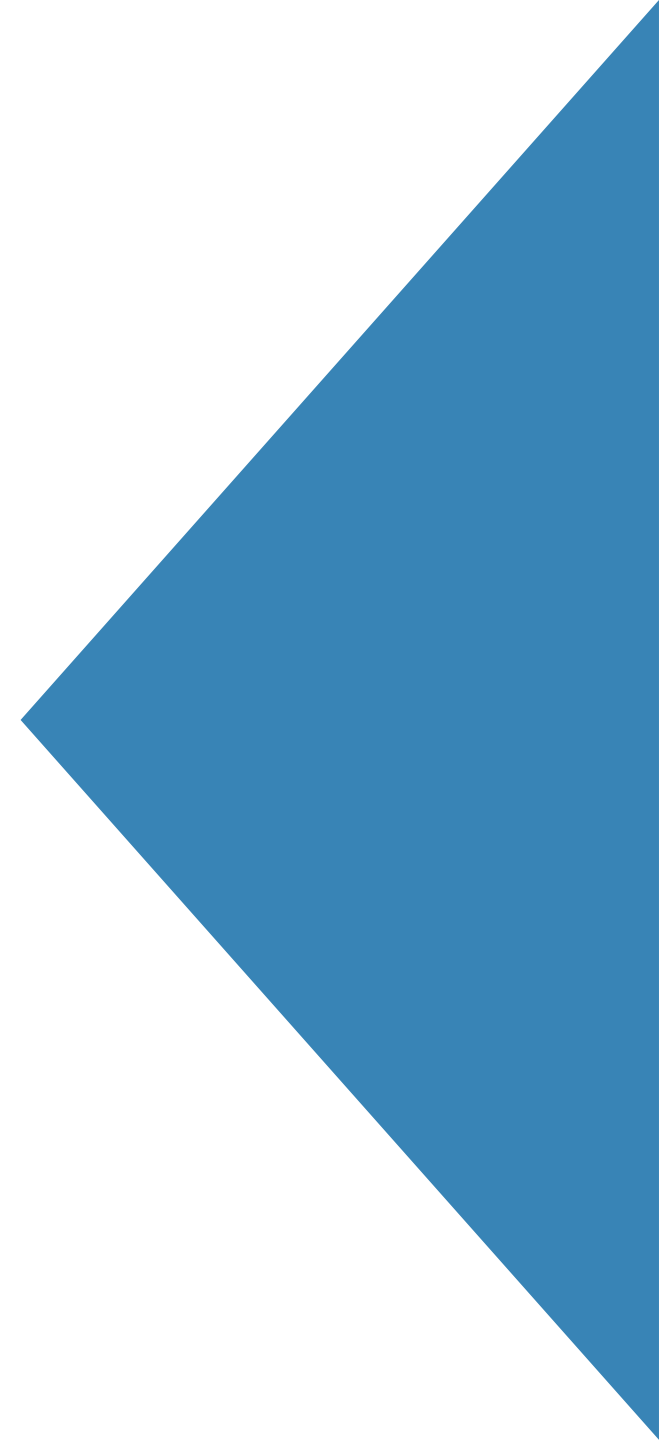
Treat others how THEY want to be treated

Platinum
THE ~~GOLDEN~~ RULE

*I'm not here to be right,
I am here to get it right*

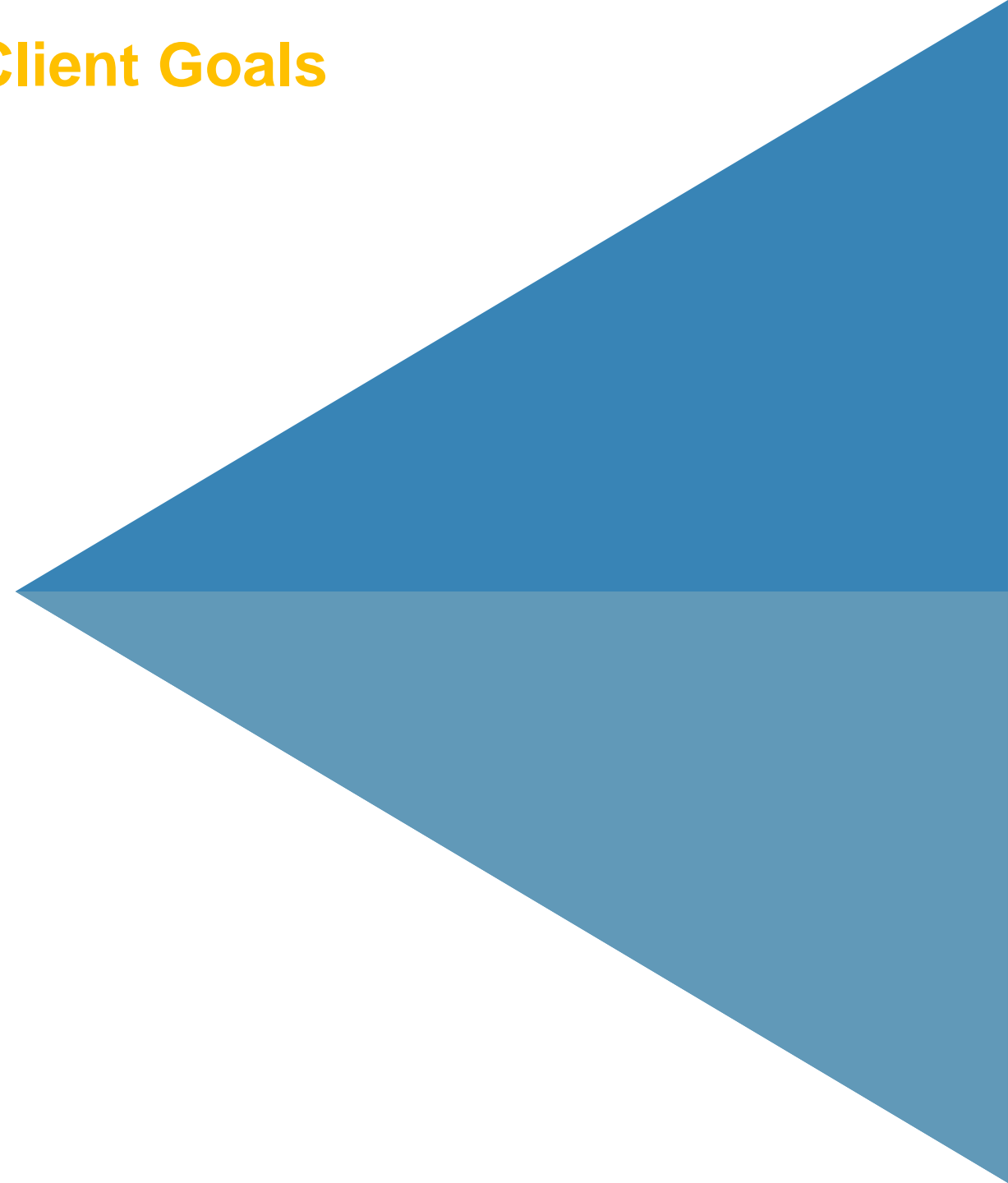
~ Brene Brown

Breakouts



Coaching for GROWTH: Common Client Goals

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- **Communication**
- **Stress Management**
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GROUP *Activity* **Overarching Coaching Engagement**

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
- **Asks what makes achieving this goal important to the client**
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BREAKOUTS: Overarching Coaching Engagement

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching**
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- **Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching engagement**

Coaching for GROWTH (each coaching session)

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching SESSION**
- **Asks what makes achieving this goal important to the client**
- **Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish during coaching SESSION (how does it align with overarching goal?)**
- **Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching SESSION (how does that align with overarching goal?)**

Coaching for GROWTH (each coaching session)

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Engagement Design Phase



Creating a Tailored Workout Plan

Your trainer will create a personalized workout plan that is unique to your goals and fitness level.



Choosing Exercises and Equipment

Based on your goals and preferences, your trainer will select exercises and equipment that allow you to reach your full potential.



Scheduling and Pacing Workouts

Your trainer will help you schedule your workouts to maximize results while minimizing injury risk. They will also ensure that your workouts progress at an appropriate pace.

Coaching for GROWTH (each coaching session)

- **Partners with the client to identify or reconfirm what they want to accomplish in coaching SESSION**
- **Asks what makes achieving this goal important to the client**
- **Partners with the client to define what the client believes they need to address or resolve to achieve what they want to accomplish during coaching SESSION (how does it align with overarching goal?)**
- **Partners with the client to define or reconfirm measures of success for what the client wants to accomplish in the coaching SESSION (how does that align with overarching goal?)**

**Initial
Goal**



Arc of a Coaching Session

<h2>The Beginning</h2> <p><i>Review (if applicable)</i></p> <p><i>Initial Goal</i></p>	<h2>The Middle</h2> <p><i>Reality Testing</i></p> <p><i>Reset Goal (if applicable)</i></p>	<h2>The End</h2> <p><i>Action</i></p> <p><i>Results (if applicable)</i></p>
<ul style="list-style-type: none"> • Client lays out challenge or what he/she would like to explore during session. • Coach begins to narrow scope by being curious, listening, asking powerful questions: <ul style="list-style-type: none"> ➤ What is desired outcome? ➤ What is at the root-level? ➤ How might success be measured? ➤ What needs to be addressed in order to achieve the outcome/goal? 	<ul style="list-style-type: none"> • Coach continues to narrow topic and ensures clarity around topic by reflecting to client agreed upon areas of discussion for session. • Coach checks in with client ½ way to see what client is taking away/learning so far. • Coach checks in with client to ensure session is going in right direction or if session goal needs to be reset. 	<ul style="list-style-type: none"> • Coach checks in with client to ask for reflection: What are you taking away from today? How does that align with your goal? • Coach helps client identify and define next steps from reflections. • Coach helps clients identify what support or resources they might need to move forward. • Coach ask client to determine the commitment he/she is going to make.



Module 4- Day 2



IN THE LAST WEEK

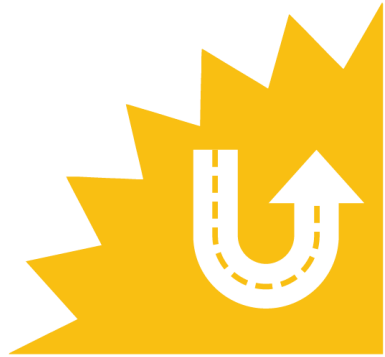
**exciting or fun
good / positive
you are proud of
made you smile or laugh**

Getting Stuck in the Negatives

LEADING CHANGE

- Think of a someone you believe is effective at leading change
- Write down three attributes, characteristics, qualities on why you believe that person is successful in the change space.

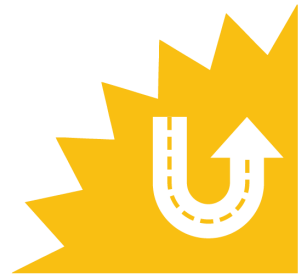
Intellect	Job Specific Expertise	Other



Change Style Indicator[®]

Improve Change Effectiveness

WHY?



Change Style
Indicator[®]
Improve Change Effectiveness

CHANGE STYLE INDICATOR (CSI)

CSI DOES:

- Offer an explanation of preferred style of initiating and dealing with change
- Describe three change style preferences that are more personality influenced than situationally influenced
- Create an appreciation for change-style diversity

CSI DOES NOT:

- Present a right or wrong, “better” or “worse” change style
- Measure level of competence at initiating and managing change

HOW
MUCH?

&

HOW
OFTEN?

INTENSITY OF CHANGE

**Change is
best when
it is
targeted
and
incremental**

**Extensive
and
fundamental
change is
good**

RATE OF CHANGE

**Change is
best when
it is
occasional**

**Constant
change is
good**

CHANGE STYLES

CONSERVER

Accept the structure

Prefer change that is incremental & occasional

PRAGMATIST

Explore the structure

Prefer change that is functional & practical

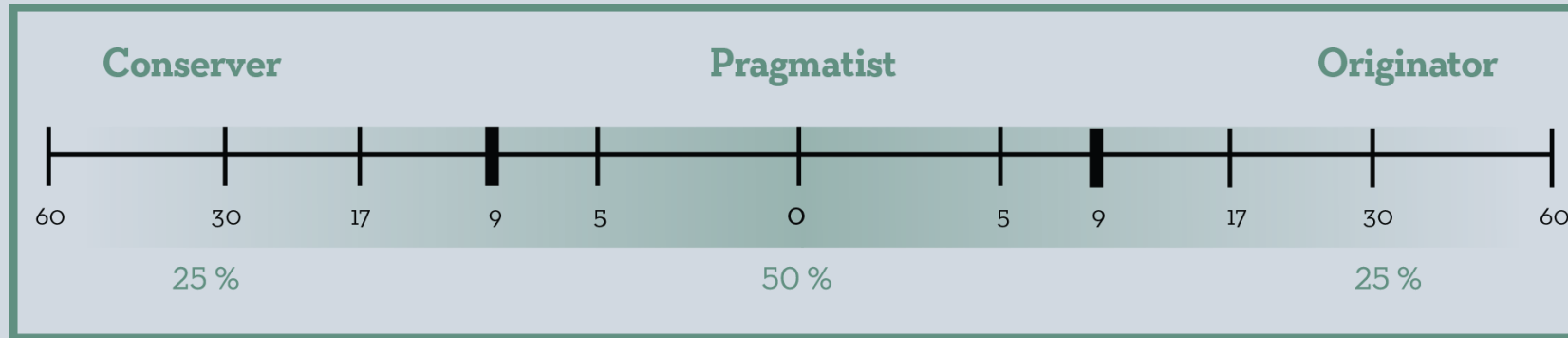
ORIGINATOR

Challenge the structure

Prefer change that is quick & expansive

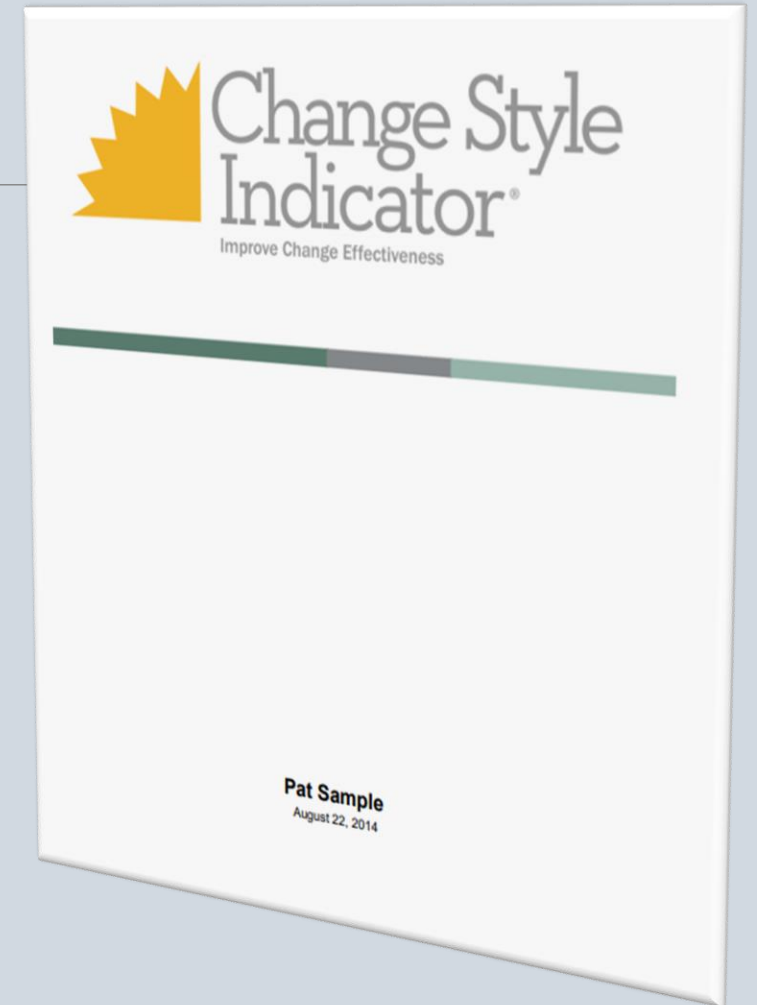
CSI CONTINUUM

Where do you think you are?

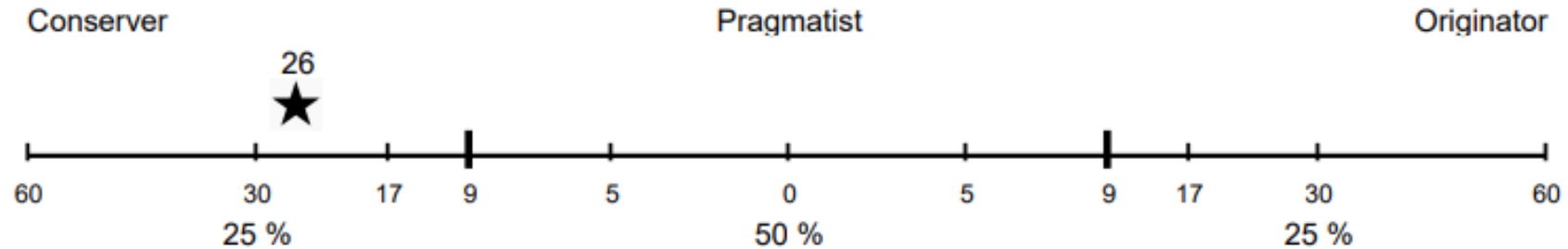


CSI Reports

- Explore your Change Style Indicator Report
- Page 4 is the only page with personalized data



Change Style Preference



As a **moderate conserver**, you prefer change that is implemented gradually and incrementally. You are good at managing details and you generally approach a new situation in a deliberate and disciplined manner. You enjoy predictable situations and appreciate established traditions and practices.

Your strengths: You can appreciate and provide clear structure in an ambiguous situation. You appreciate the contributions of co-workers and you value the coordination of efforts across work units. You help others reach consensus and look for alternatives that benefit the group. You deal constructively with failures and accept criticism without being overly defensive.

Your potential challenges: You may find it difficult to see the need to challenge organizational policies and practices that are out-dated and no longer serving a useful purpose. Creating long-term strategy and shared vision among co-workers may not come naturally and will require careful planning on your part.

CSI Style Profiles Pitfalls & Tips

CSI Pages 8 & 10

CSI Pages 5-7

CONSERVER CHANGE STYLE PREFERENCE

CONSERVER
People with a Conservator preference may appear disciplined. They know the rules, regulations, and policies of their domain. For the Conservator, rules and regulations have an order and would have no order, resulting in chaos. Conservators like to protect and preserve the resources of the organization and well-reasoned change. Conservators understand the importance of using that knowledge to facilitate change they believe in existing organizational culture.

When Facing Change

- Prefer change that maintains the integrity of the current structure
- May operate from conventional assumptions
- Enjoy predictability
- May appear cautious and inflexible
- May focus on details and the routine

When Contributing to the Organization

- Get things done on schedule
- Work well within organizational structure and constraints
- Attend to detail and factual information
- Encourage strong follow-through skills
- Protect and manage the organization's resources
- Handle day-to-day operations with efficiency

PRAGMATIST CHANGE STYLE PREFERENCE

PRAGMATIST
People with a Pragmatist preference may appear to be Pragmatists tend to solve problems in ways that are understood and respect rules and policies but are more team oriented than either Conservators or Originators are working to solve the problem. While Conservators and Originators are exploring the most effective means to solve the problem, Pragmatists are exploring the most effective means to solve the problem. Pragmatists are pragmatic in their approach. Pragmatists like to protect and preserve the resources of the organization and well-reasoned change. Pragmatists understand the importance of using that knowledge to facilitate change they believe in existing organizational culture.

When Facing Change

- Prefer change that emphasizes workable outcomes
- Are more focused on results than structure
- Are open to both sides of an argument
- Operate as mediators and catalysts or team
- May take more of a middle-of-the-road approach
- Appear more team-oriented

When Contributing to the Organization

- Get things done in spite of rules, regulations, and policies
- Negotiate and encourage cooperation
- Compromise to get problems solved
- Take a realistic and practical approach
- Draw people together around a common purpose
- Organize ideas into action plans
- Promote practical organizational structure

ORIGINATOR CHANGE STYLE PREFERENCE

ORIGINATOR
People with an Originator preference may appear unconventional, spontaneous and lacking organization. They frequently attempt to solve problems in ways that challenge existing structure. Tradition and history are of less value than future possibilities. Originators prefer quick and expansive change. They are divergent thinkers and often generate many new ideas. Originators do not enjoy repetitive tasks and will look for a new or different way to do a job, whether needed or not. Originators are often described as risk-takers and may be viewed as the quintessential change agent. They will readily challenge the status quo and may even view the status quo as the problem.

When Facing Change

- Prefer change that challenges current structure
- Will challenge accepted assumptions
- Enjoy risk and uncertainty
- May appear impractical and sometimes miss important details
- May appear more future than past-oriented
- Can treat accepted policies and procedures with little regard

When Contributing to the Organization

- Push the organization to see the big picture
- Provide future-oriented perspectives for the organization
- Support and encourage risk-taking behavior
- Promote new ideas, projects and activities
- Enjoy complex problems
- Think conceptually

When Leading

- Serve as catalysts for big change
- Can be energetic and enthusiastic
- Provide long-range perspective
- Conceptualize and design new processes that reorganize the whole system
- Like to be in charge of the start-up phase

When Supporting Innovation

- Not afraid to challenge the status quo
- Encourage exploration of new and alternative ideas
- Can present possibilities that others do not imagine
- Produce many divergent ideas

When Collaborating

- Encourage out-of-the-box thinking
- Initiate enthusiasm and excitement
- Focus on initiating new tasks

POTENTIAL PITFALLS OF EACH STYLE

Our change styles can be a source of strength and effectiveness. However, as with any strength, when overused can become a derailer. Below are some common challenges faced by people with each of the three styles.

Potential Pitfalls of CONSERVERS

- May be rigid in thought and action
- May discourage innovation by promoting existing ideas, policies and procedures
- May not see beyond the present details to understand the broader context
- May delay completion of tasks because of perfectionism
- May delay action by overly reflecting on a situation
- May appear unyielding and set in their ways
- May over-focus on irrelevant details and inconsistencies

Potential Pitfalls of ORIGINATORS

- May create chaos and lack of discipline
- May not adjust their vision to the practical constraints of the situation
- May become lost in theory, ignoring or forgetting current realities
- May not adapt well to new policies and procedures
- May underestimate the short-term impact of change on the organization and other people
- May overlook relevant details
- May not understand the value of engagement everyone needed for implementation
- May move on to new ideas or projects without completing those already started

Potential Pitfalls of PRAGMATISTS

- May over-focus on building consensus
- May not adequately identify and promote personal ideas and priorities
- May try to please too many people at the same time
- May be indecisive and take too long to make decisions
- May appear to flip flop on an issue
- May be too easily swayed
- May negotiate compromise that is too "middle of the road"

TIPS FOR INCREASING FLEXIBILITY AND MAXIMIZING EFFECTIVENESS

General Tips for All Change Preferences

- Ask lots of questions and listen to the answers.
- Consult with a person you believe to have a style different from yours before proceeding.
- Make efforts to understand the perspectives of styles other than yours.
- Write down your biggest concern and then have someone with the most different style write down how they might respond.
- Step back and be aware of your initial reaction in a situation, especially when you are aware of responding emotionally.
- Emotional reactions can be a good indicator that your response to a situation is related to more than the facts at hand

If you are a CONSERVER:

- Consider at least three alternatives before making a decision.
- Wait a night, day, or week (depending upon time-line) before making/announcing a decision.
- Think of big picture consequences of actions. Ask others to explain them or provide input if necessary.
- Find someone you suspect is an Originator and ask for his/her perspective.
- When time is critical, identify no more than three or four criteria for deciding who should be included in framing your decision.
- Develop tools and strategies for exploring and understanding long-term consequences of change – think five years.
- Find someone who is willing to play devil's advocate with your proposed solutions/ideas.

Write a list of advantages for taking a more Originator type approach in a given situation.

- 0=unacceptable
- 1=marginally acceptable
- 2=satisfactory
- 3=excellent

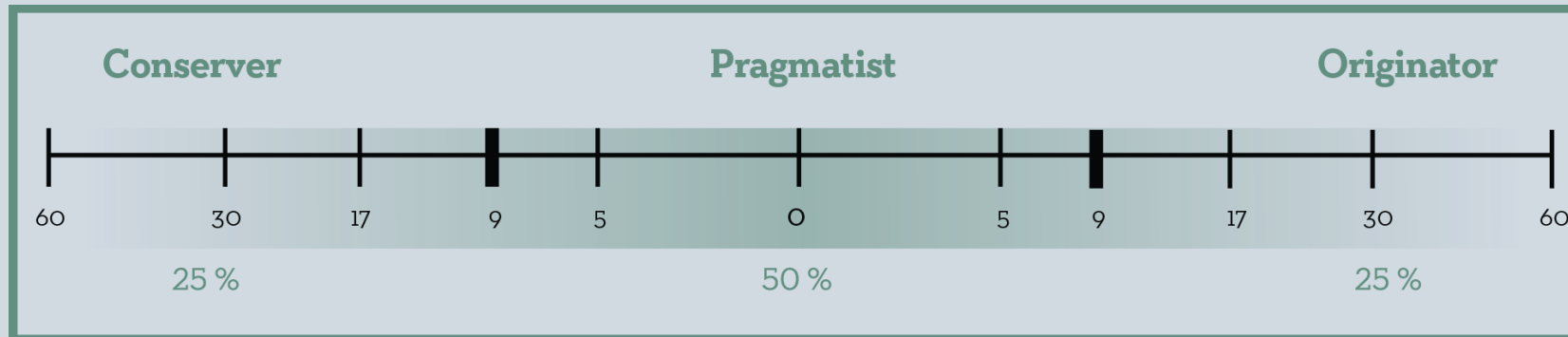
If you are a PRAGMATIST:

- Identify a strong Conservator and a strong Originator and solicit their opinions.
- Ask "Why" questions to Conservators.
- Ask "What's stopping you" questions to Originators.
- Specify a period of time to consider alternatives, after which you commit to a solution.
- Imagine the consequences of your decision in a year, five years, or ten years.
- Imagine the consequences of your decision on someone you care about.
- When dealing with strong Conservators or Originators, ask exploratory questions about emotional responses to a situation – questions such as:
 - How do you feel about this?
 - How would you like for others to feel?
- Create a list of all the potential solutions or actions which could be taken (best ideas from the Conservators and Originators, as well as your own). Next, identify no more than five criteria for assessing each item. Apply each of the criteria to each of the solutions using the scale below. Then prioritize the potential solutions based on the points received:
 - 0=unacceptable
 - 1=marginally acceptable
 - 2=satisfactory
 - 3=excellent

If you are an ORIGINATOR:

- Avoid using committees for decision-making and problem solving unless they are really needed. To decide which issues are appropriate for a committee, develop a list of three to four criteria against which the decision can be referenced; then select.
- Be willing for some not to be totally satisfied

Which Style best fits?



GROUP *Activity*

Change Discussion

DISCUSS AND SHARE IN CHANGE STYLE GROUPS

- When change is good and effective, what does it look and sound like?
- What scares and/or irritates me about change?

Change Styles Challenge: Understanding each Style

Conservator

Pragmatist

Originator

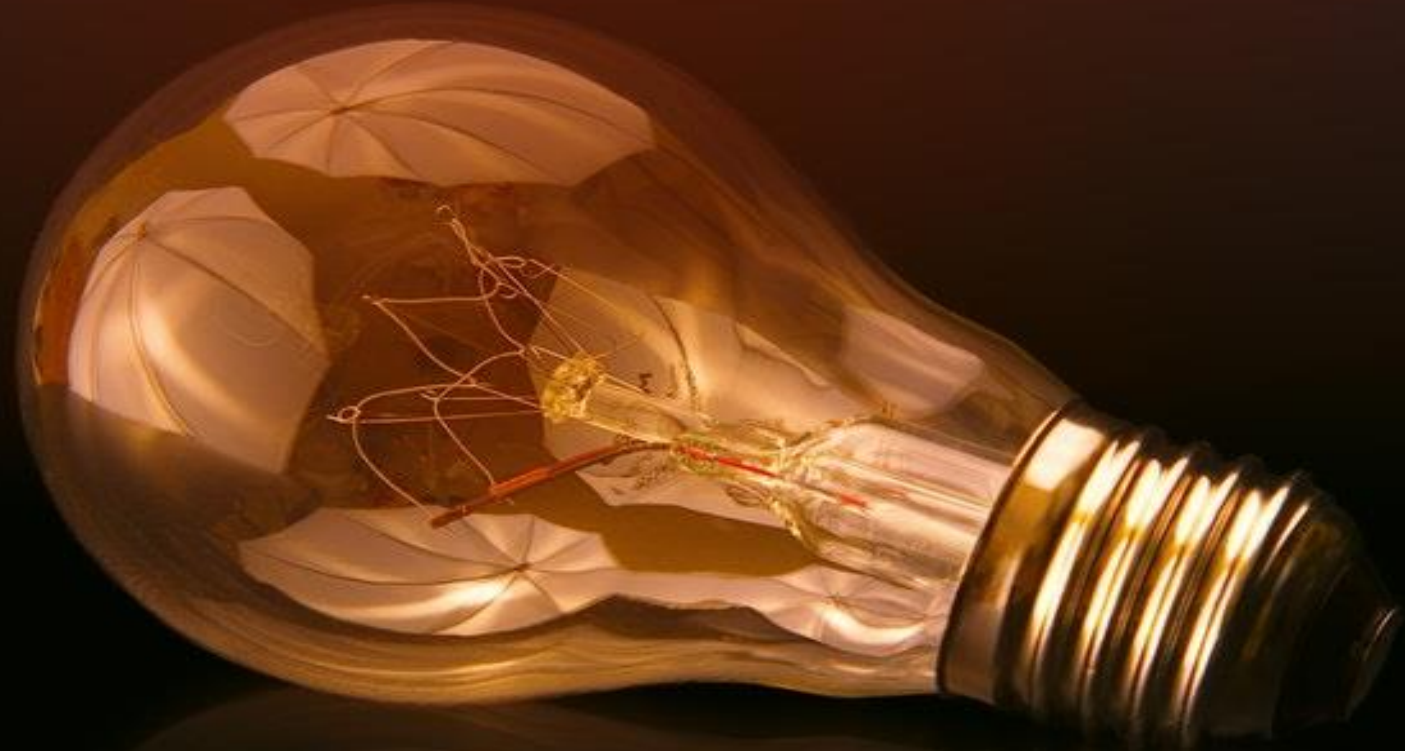
CONSERVER	PRAGMATIST	ORIGINATOR
Why don't we just think about it for awhile?	I can see both sides to the issue. Is there a compromise?	Just think of the possibilities!
Let's take it slowly.	Let's be flexible and consider options, but not pull the trigger too quickly.	Let's just DO it!
We may need to fix 'this', but let's leave the rest as it is.	What changes make the most sense?	We can think about the details later.
Why change it?	What are the pros & cons to changing it?	Why NOT change it?

Making Connections



SO WHAT, NOW WHAT?

Individual Awareness



Conflict Management

Planning New Initiatives

Assessing Situational Appropriateness of Change Styles



ASSESSING SITUATIONAL APPROPRIATENESS OF CHANGE STYLE

- **How critical is time?** If time is a critical factor, more original solutions are not advisable. Original ideas require more time to implement. |
- **How many solutions have been tried already?** If several solutions have been tried unsuccessfully, a more radical (original) solution may be needed.
- **How limited are resources?** Typically, ideas that are more conserving require fewer resources to implement.
- **How critical is the situation?** The more critical the situation, the more likely that a more radical (original) solution is appropriate. In a life/death situation a conventional (conservative) solution may not provide the degree of change needed to avert a disaster. This is especially true when conventional solutions have been tried and proven inadequate.
- **How long has a team worked together?** The longer a team is together, the stronger the tendency to produce ideas and solutions that fall on the conserving side of the change continuum. By being aware of this tendency, teams can push themselves to produce more radical or original ideas. As another strategy, a new person could be brought onto the team.
- **Are politics playing a part in the situation/decision?** If yes, a middle-of-the-road (pragmatic) solution may work best. When politics impact change and extreme or intractable positions challenge each other, a more pragmatic approach can identify common ground.

TIME?

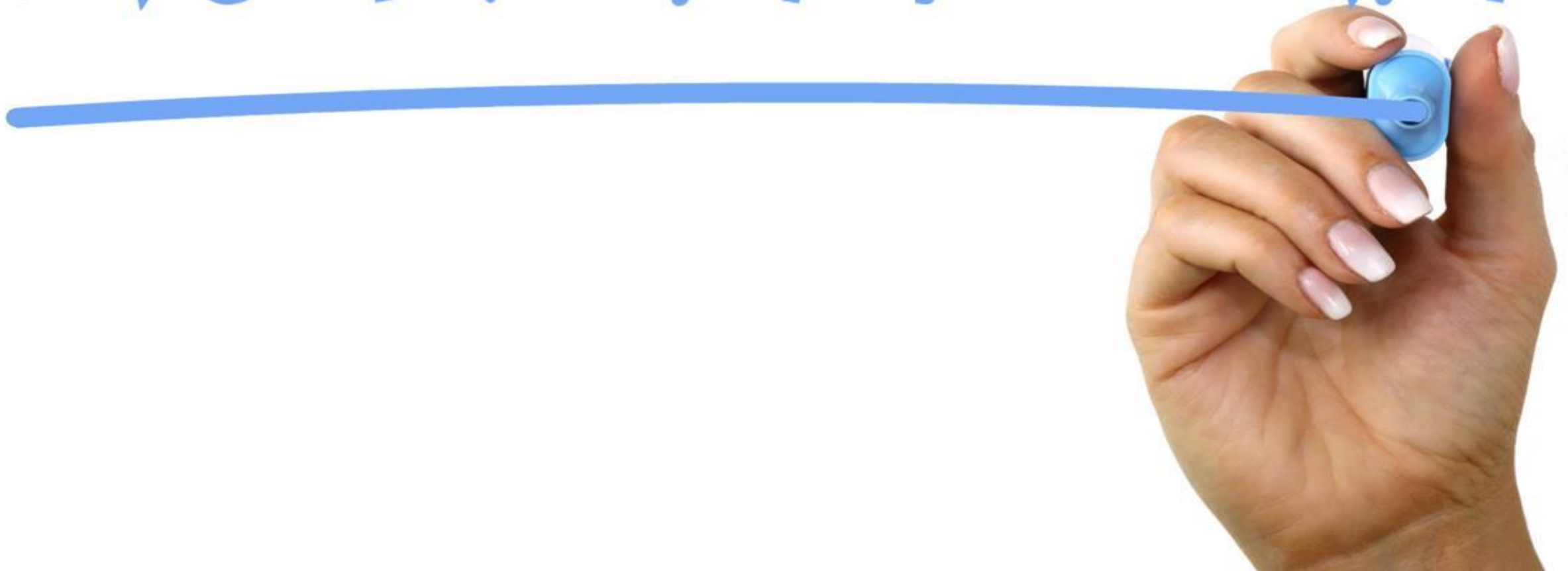
RESOURCES?

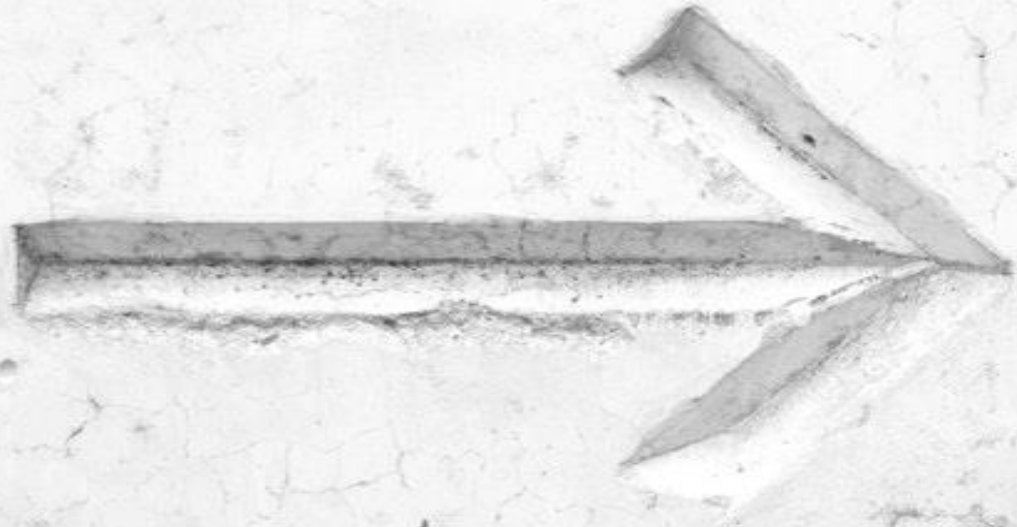
CLIENT'S PREFERENCE?

Communicating Change--HOW WOULD THAT SOUND???

Conservers	Pragmatists	Originators
<ul style="list-style-type: none">❑ Know the details.❑ Don't start by presenting the big picture.❑ Pick one angle and build from there.❑ Present a minimum of information and ask what else is needed.❑ Let them guide you with what they need to know.❑ Ask about anticipated obstacles.	<ul style="list-style-type: none">❑ Speak in terms of outcomes.❑ Talk about the consequences.❑ Ask for recommendations.❑ Talk about timelines.❑ Ask who's input is needed.	<ul style="list-style-type: none">❑ Think in the future.❑ Ask what they would like to see happen.❑ Ask for ideas.❑ Ask what's effective in the current system (status quo) that they would not want to change.❑ Talk about the connection between the change and future effectiveness.❑ Give details as they are requested.

ACTION PLAN





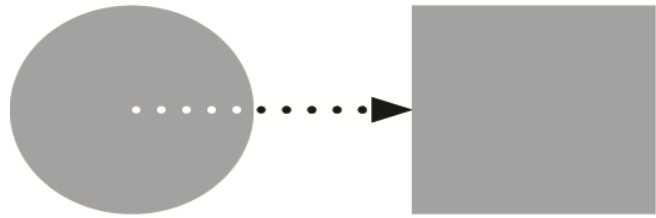
**Moving through
CHANGE**



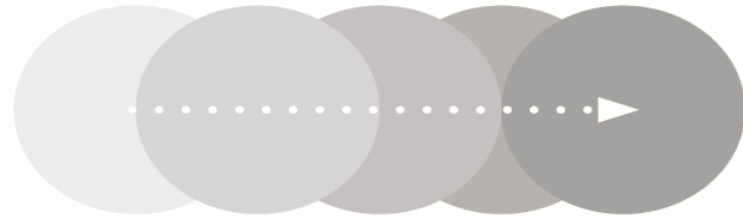
CHANGE NAVIGATOR



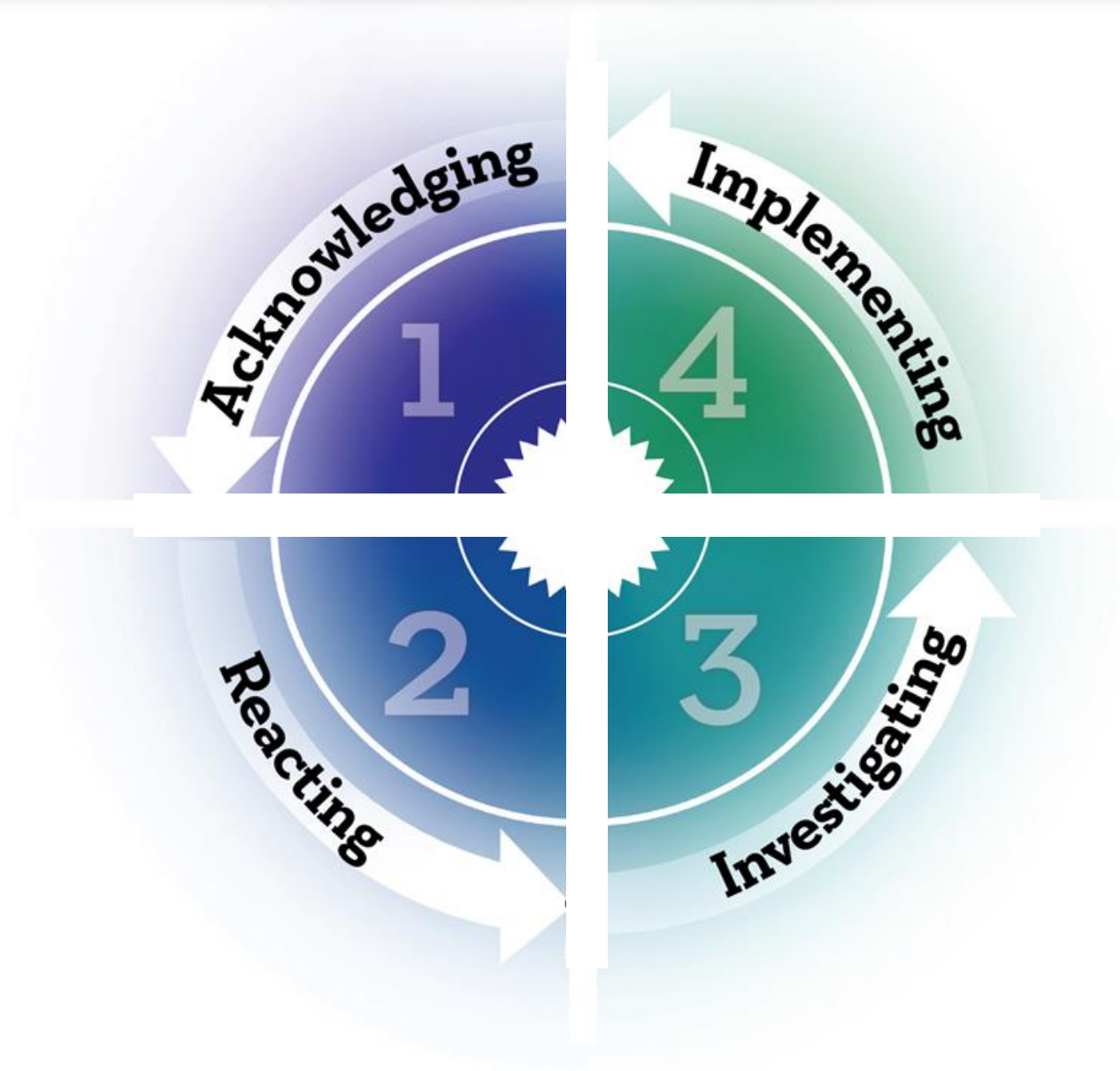
CHANGE



TRANSITION



Moving through Change



Completing the Change Navigator

First: Complete the Worksheet on page 2 (5 min.)

1. Briefly describe a change you currently are experiencing
2. List *4 things - facts* - you know or think you know about this situation (impacts, opportunities, challenges, stakeholders, resources, timelines etc.)
3. List *3 feelings* you associate with this change
4. Briefly share with your partner the feelings you are associating with a change. (5 min. each)

Completing the Change Navigator

First

1. Briefly describe a change you currently are experiencing
2. List **4 things - facts** - you know or think you know about this situation (impacts, opportunities, challenges, stakeholders, resources, timelines etc.)
3. List **3 feelings** you associate with this change

Next (Change Navigator Assessment - Insert)

- Based on how you *really* think and feel about this change (not what you believe you should think or feel)
- Distribute 5 points among the 4 descriptions in each row –

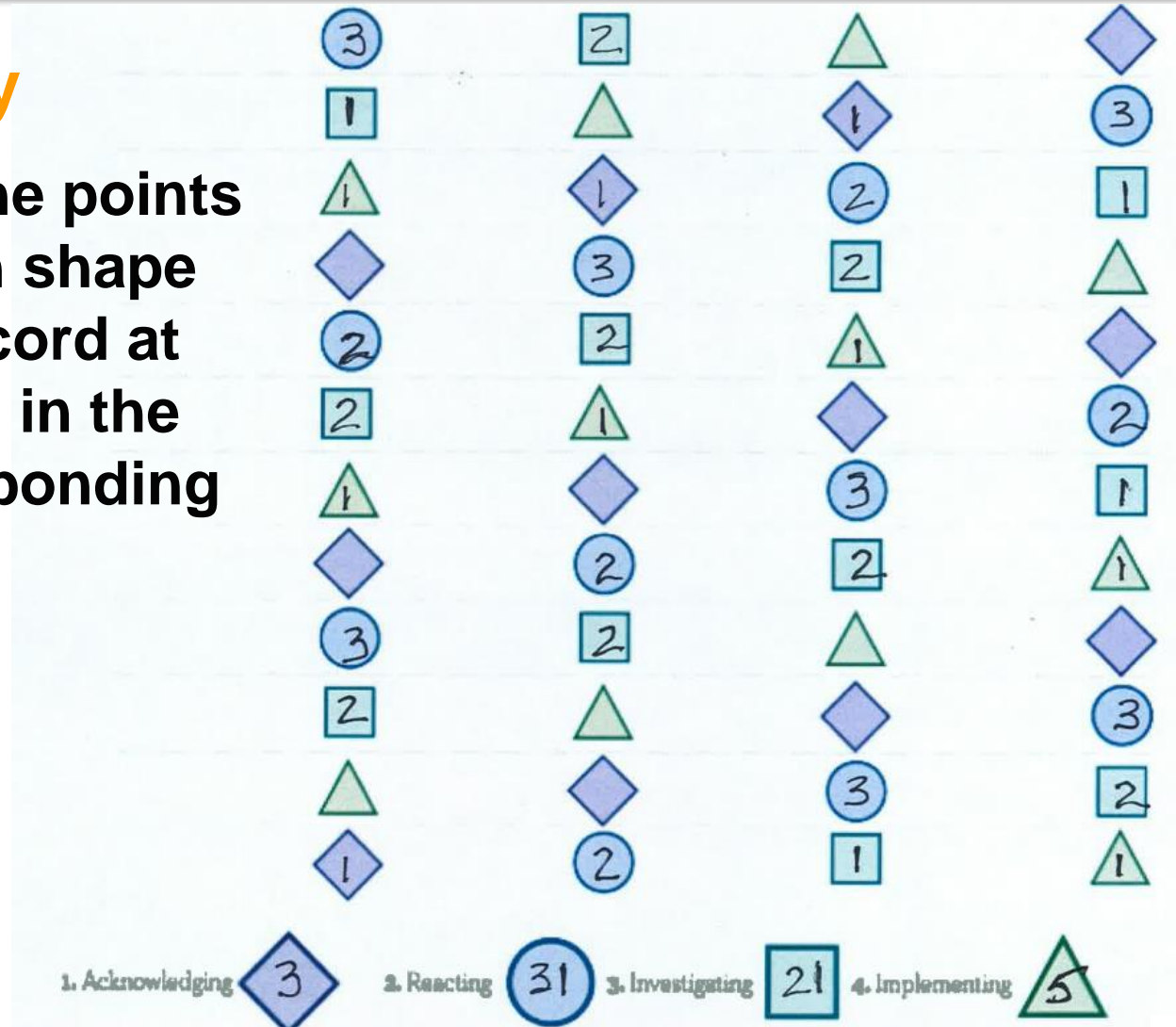
Example:

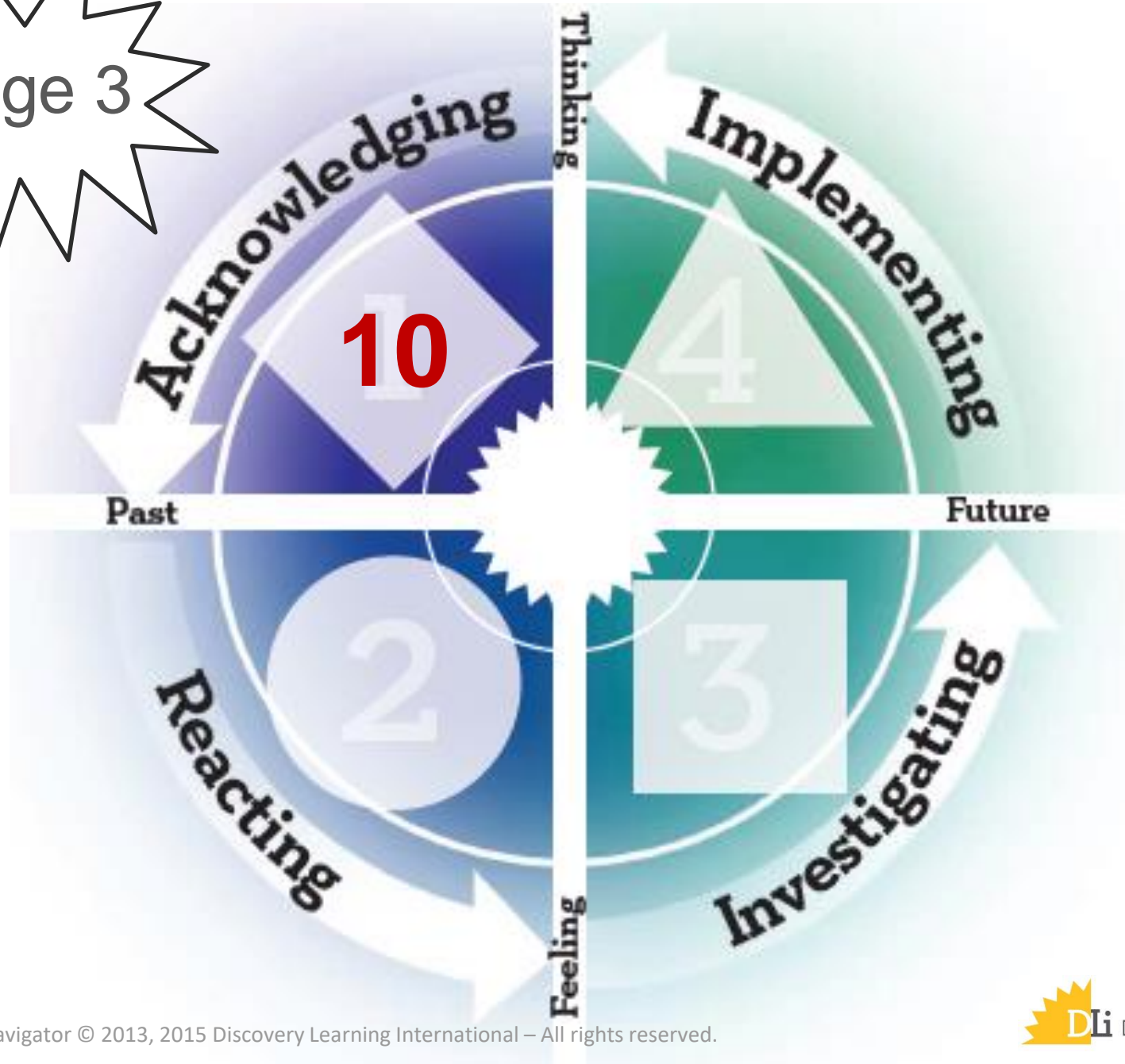
Irrelevant	0	Tired	4	Optimistic	1	Realistic	0
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Completing the Change Navigator

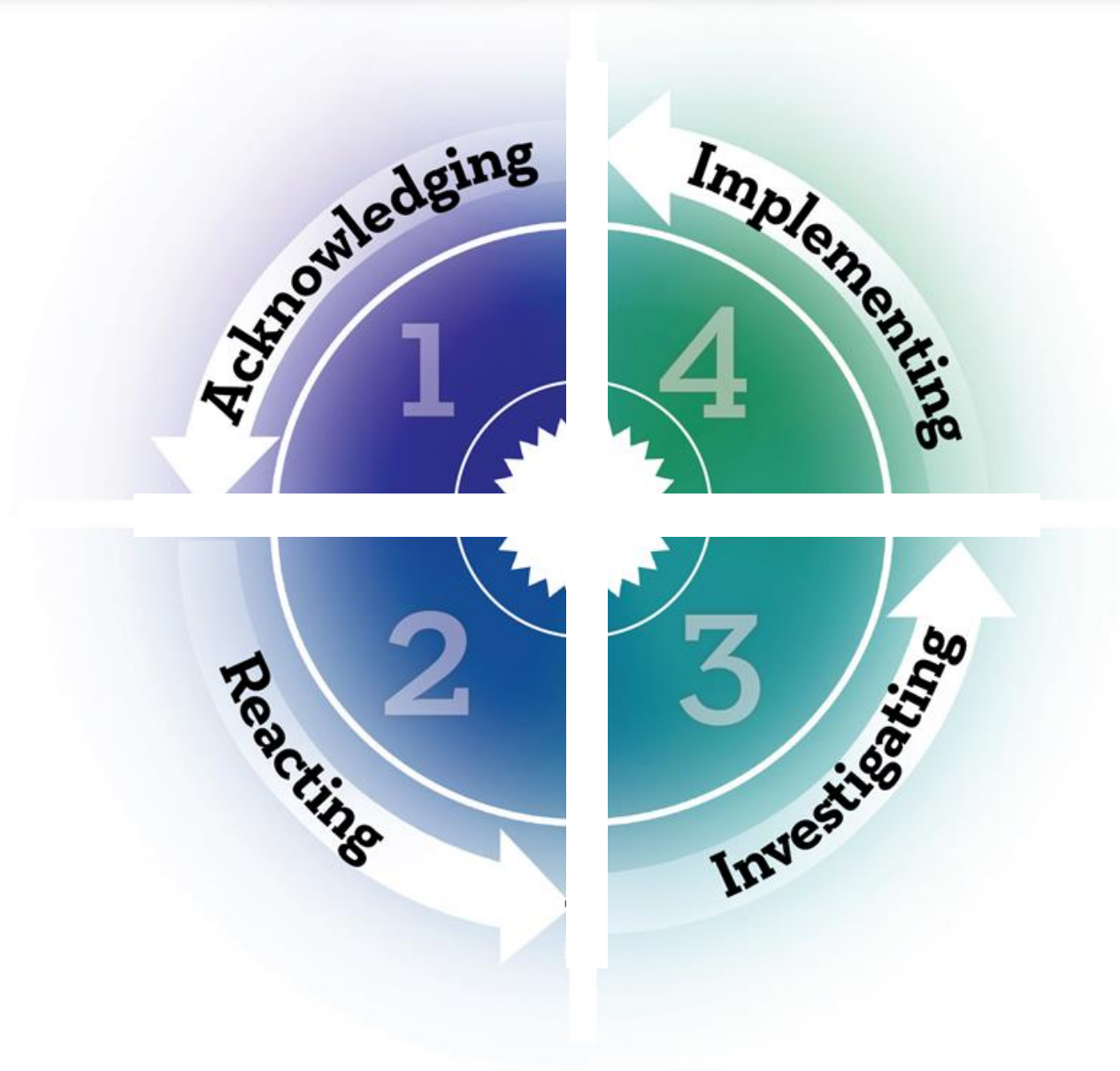
Finally

Total the points in each shape and record at bottom in the corresponding shape





Moving through Change



Moving through Change

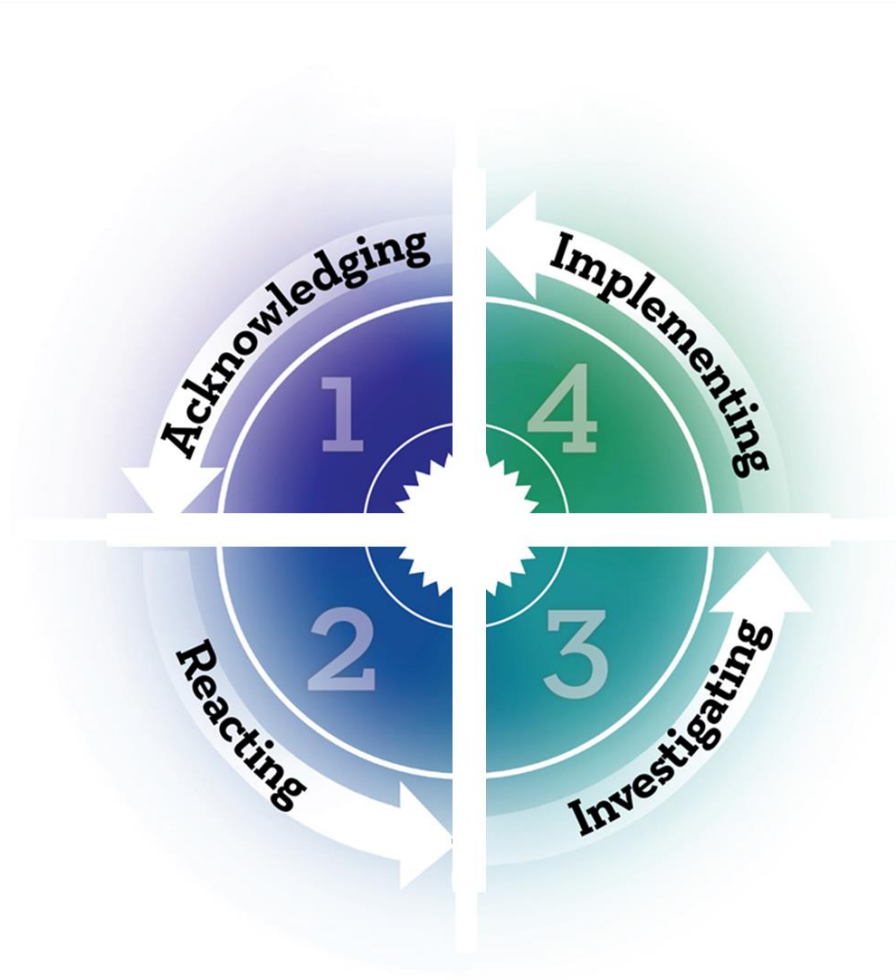
Information is critical

Build understanding of the change—what is and isn't changing

Emotions can be intense

Give Support

Patience is critical



Learning is still expected

Accountability and clarity

Build new skills, behaviors, norms

Encourage exploration & learning—pros/cons

Stay connected

Honesty is critical

Build the new reality

Resistance or Resiliency

Emotions That Lead to Resistance

Anxiety

Confusion

Frustration

Fatigue

Emotions that Lead to Resilience

Purpose

Enthusiasm

Optimism

Confidence

Source: McKinsey Quarterly

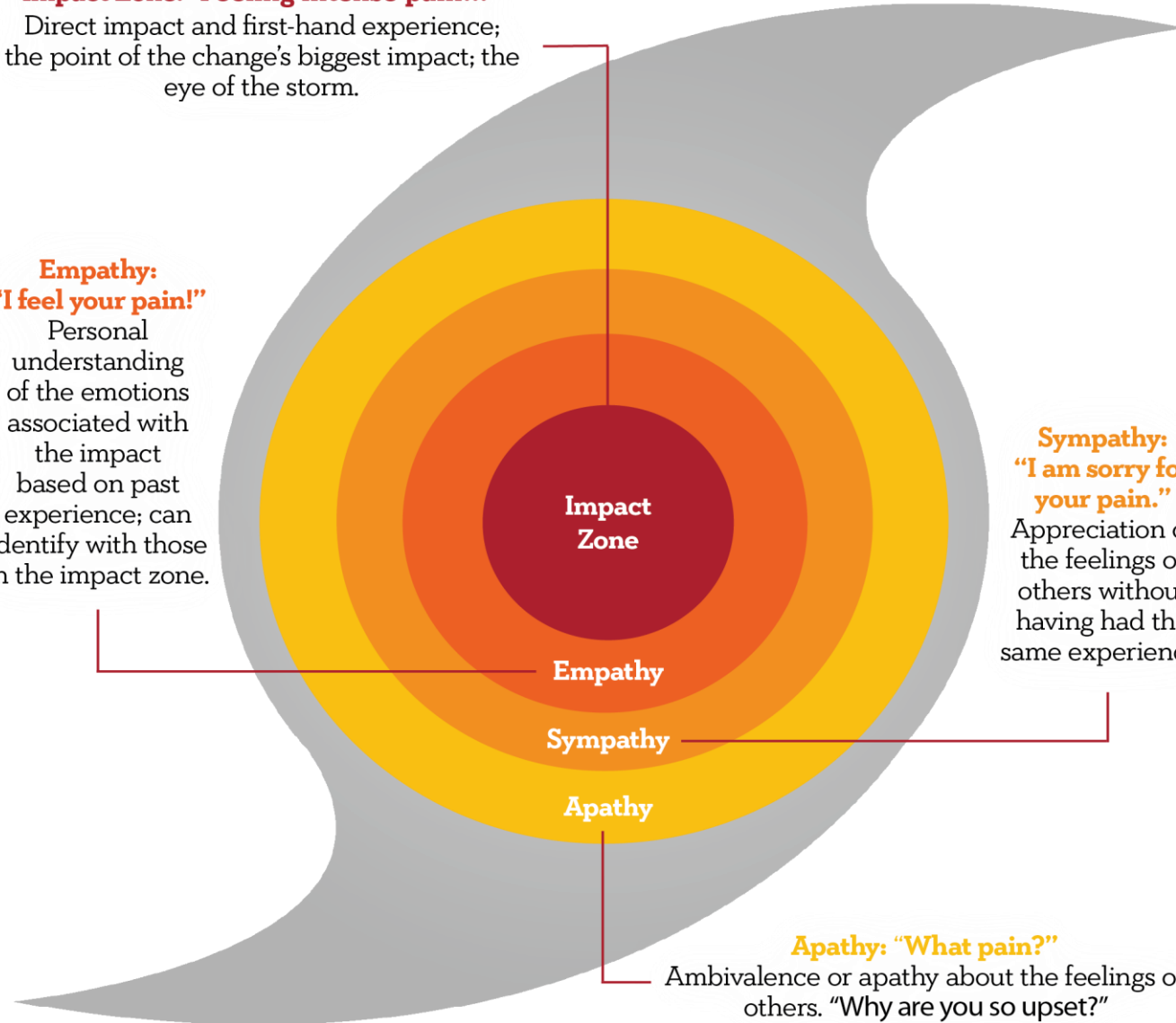
Change Navigator © 2013, 2015 Discovery Learning International – All rights reserved.

Proximity to Change

Impact Zone: "Feeling intense pain!!!"
Direct impact and first-hand experience;
the point of the change's biggest impact; the
eye of the storm.

Empathy: "I feel your pain!"
Personal
understanding
of the emotions
associated with
the impact
based on past
experience; can
identify with those
in the impact zone.

Sympathy: "I am sorry for your pain."
Appreciation of
the feelings of
others without
having had the
same experience.



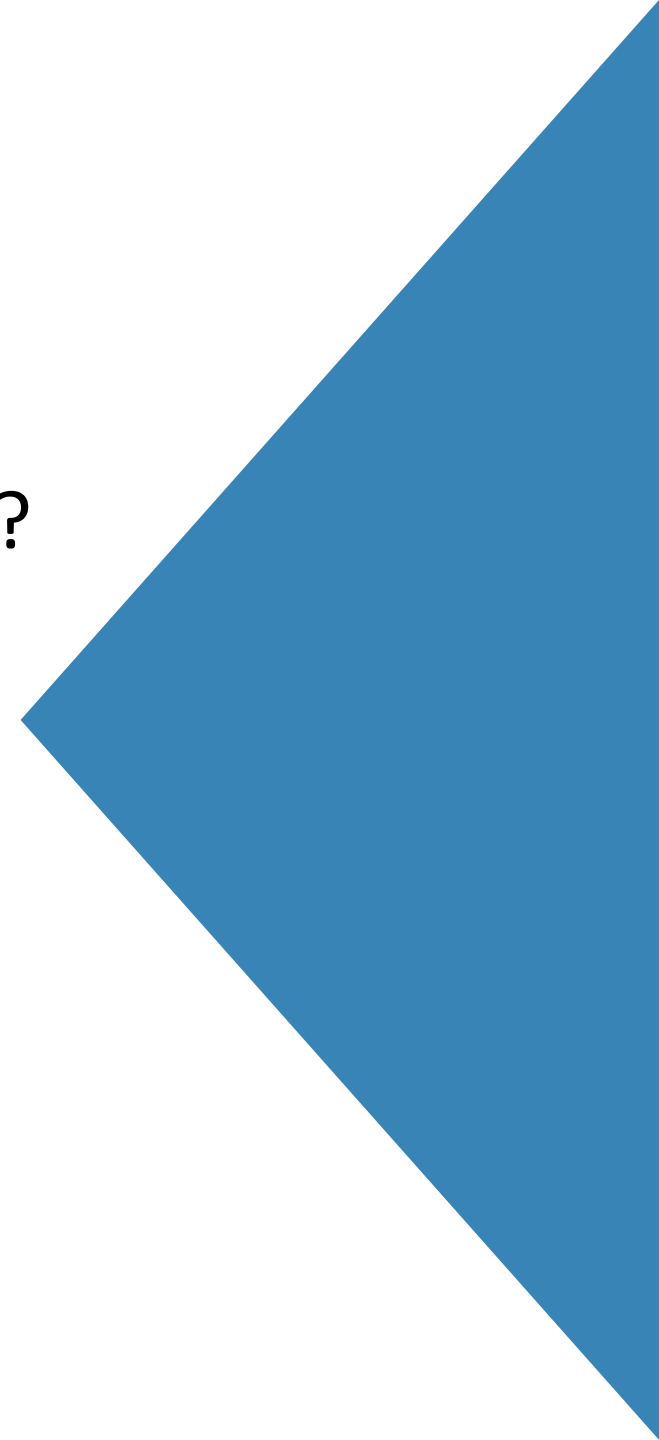
Apathy: "What pain?"
Ambivalence or apathy about the feelings of
others. "Why are you so upset?"

The background features a large, dark blue triangle on the left side, pointing towards the top right. The rest of the background is white. The text is centered in the white area.

Making SHIFT Happen: From Powerless to Powerful

In breakouts, please share:

- What is your biggest source of inspiration at work?
- Who or what project is the biggest thorn in your side at work?




Where are you?


- Doing your taxes
- Snow
- The person in line ahead of you at starbucks paid for your latte
- Learning something new that adds to your skillset
- Working out
- Singing Karaoke in public

How does this work for me? Against me?

	Above the Line	Below the Line
Advantages	<ul style="list-style-type: none">• Fuels Growth• Breeds connection• Fosters alignment between "who" and "what"	<ul style="list-style-type: none">• Quick boost of energy• Ensure a "win"• I don't have to take responsibility
Disadvantages	<ul style="list-style-type: none">• Can dismiss our own feelings or feelings of others• Can be seen as "aloof" or disconnected	<ul style="list-style-type: none">• Can be selfish and destructive; only think of self• Shuts down empathy and connection

The Drama Triangle

- First described by psychologist Stephen Karpman in the 1960's
 - Also referred to as the victim triangle.
 - Illustrates 3 roles: victim, rescuer and persecutor.
 - Demonstrates how people take on dysfunctional roles to address conflict (inner and outer).
 - Sometimes a person can play 2 of these, or all of them, depending on the dynamics of the relationship.
 - We cast others or even situations in the unoccupied roles.
 - Stepping into any/all of these roles drains our energy.
- 



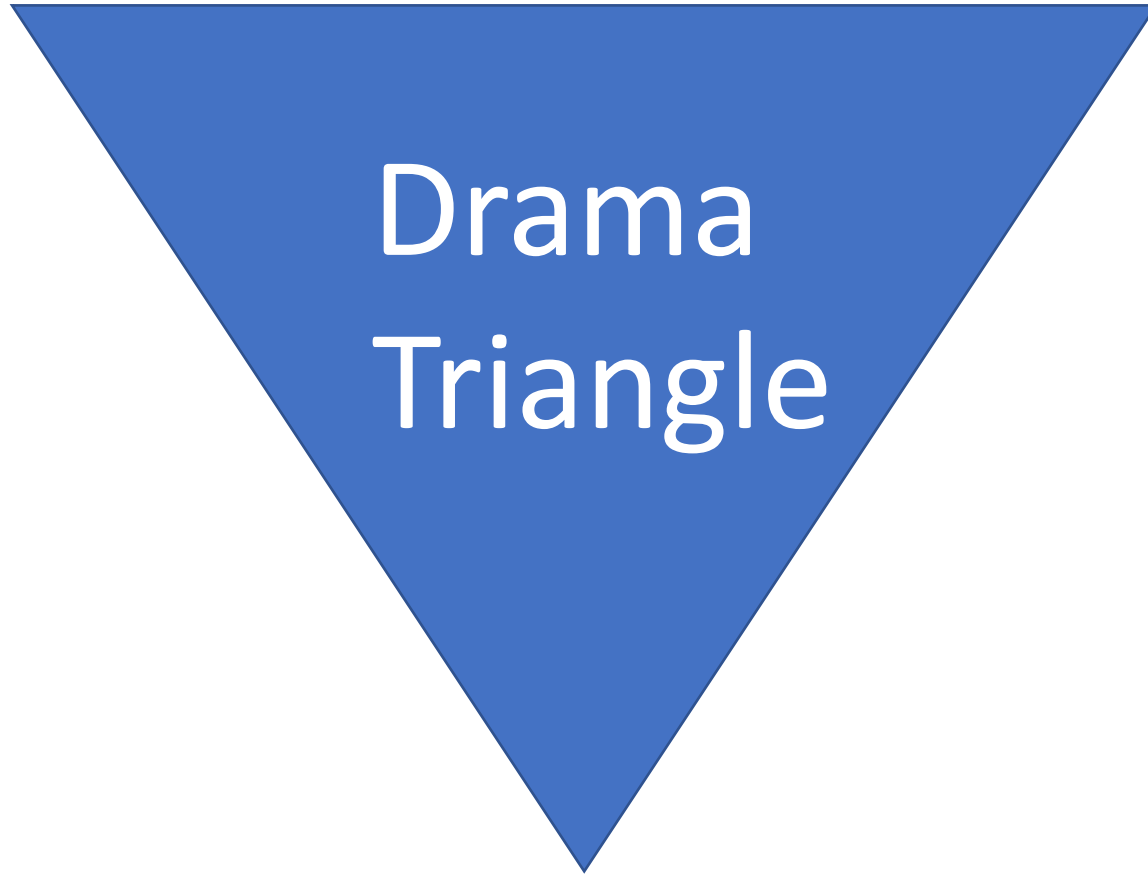
“Until you make the unconscious
conscious, it will rule your life and you will
call it Fate.”

~Carl Jung





Rescuer



Persecutor

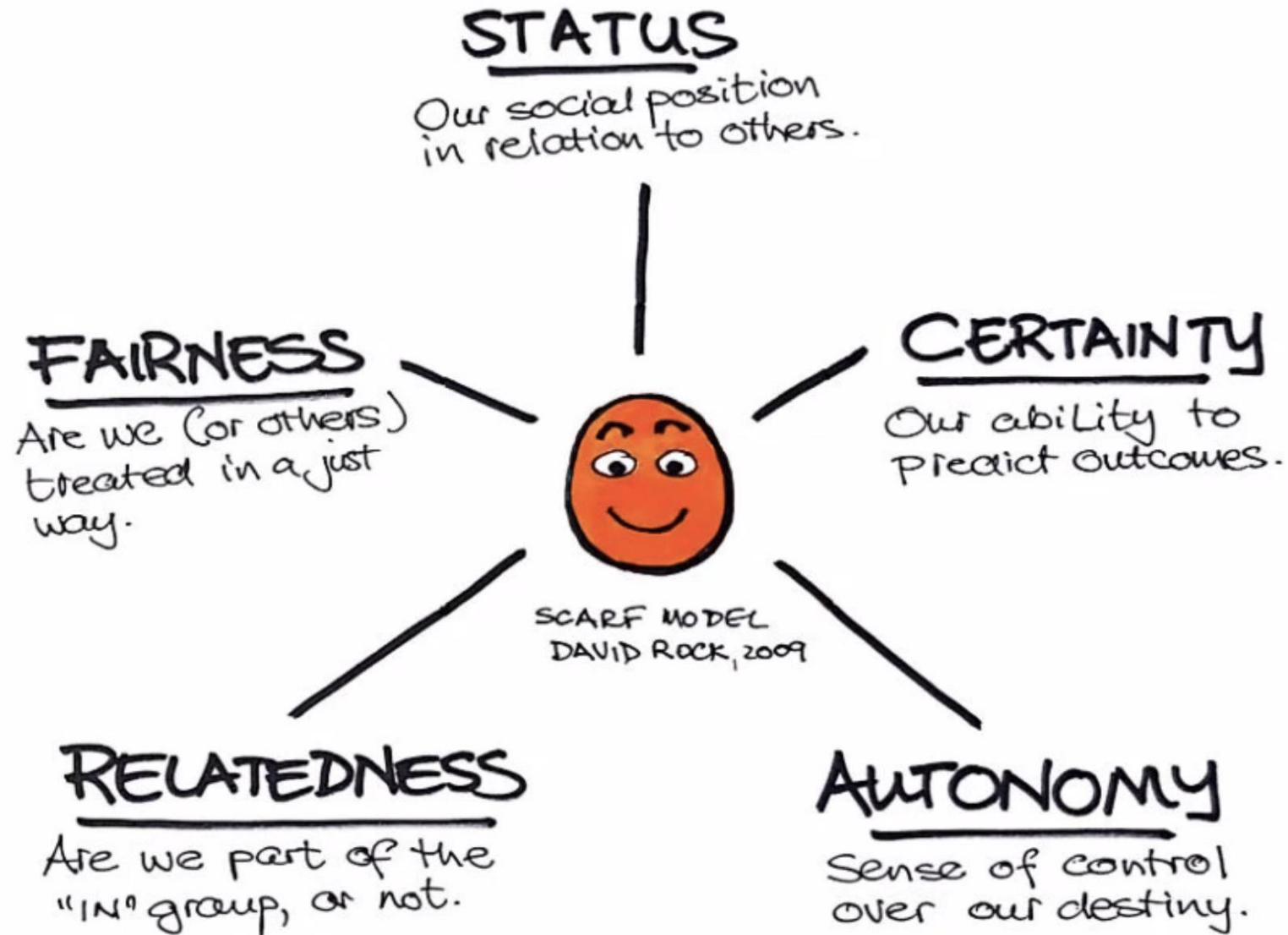


Victim



"To Me"

Habits, Patterns, and Stress



The slide features a blue geometric background on the left side, consisting of two overlapping triangular shapes. The top triangle is a lighter shade of blue, and the bottom triangle is a darker shade. The rest of the slide is white.

For each question, identify:

- What would you hear your client's say?
What kind of statements might they make?
- How might they feel?
- What would they do?

Victim

- Powerless at the mercy of, feels trapped, helpless, hopeless
- Avoids taking responsibility for because they don't think they have the power to change it. "why bother, it won't matter anyway"
- Focuses on the problem
- Waiting for someone else to fix the situation
- Focuses on what isn't working and what they don't want
- Believes it to be easier to disengage, complain or give up

Hear...

I can't
They did this to me...
It's not my fault..
This is impossible..
How did I get here?
It's not my fault
"but..."
It won't make a difference

Feel..

Powerlessness
Weak
Insecure
Defeated
Helpless
Dejected
Resentful
Apathetic
Spent
Drained
Anger
Overwhelm
Confusion

Do...

Inaction
Physically look defeated
Look down, no eye contact
Closed off-body language
Head down
AVOID
Rolling eyes
Dismissive
Cry
Soft or loud voice
Deflecting/dismissive
Defensive

Persecutor

Motto: “It’s all your fault!!”

- Fears being powerless, aka a victim
- Find fault, critical of behavior and use that “evidence” to blame victim
- Uses blame, defensiveness to be “right”
- Uncomfortable with ambiguity or uncertainty
- Dominates time and energy of a victim

*Persecutor can be a person but also a situation such as a health condition, accident, change in work process, etc. Lack of time and money are also two common persecutors for clients

Hear...

This person did that
This is your fault
I showed them the right way
and they didn’t do it.
You don’t understand
I’ve got it don’t worry about it
You promised
Try harder

Feel...

Opportunistic
Anger
Entitled
Trivializing
Disappointed
Powerful
Insecure (and hiding it)
Frustration

Do..

Finger pointing
Raising voice
Talking over
Disregard for others
Pleads the 5th
Ignores social cues
Stealthy
Manipulative
Lean forward
Puffy back
Silverback

Rescuer

Motto: "It's my job to help you!"

- Helps by intervening into the dynamics of victim and persecutor when there is perceived harm
- Shadow is wanting to be valued for helping others
- Focuses on pain of others, not their own
- Loves being heroic problem solver and care taker
- Continuously focused on what others need

Hear...

I'm taking over
I can handle it all
Let me do it
It's not your fault
I'll fix it
Leave it to me
Let me help you

Feel..

Wants to feel needed
Superior
Burdened
Martyr
Wholesomeness
Responsible
Righteousness
Resentful
Annoyance
Superiority

Do...

Taking over
Performing
Protecting
Action
Takes on responsibility that
isn't theirs to take

Initial Goal



What does the opposite of
victim look like?

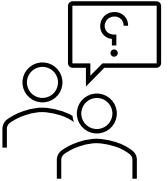
“By Me”

Creator



The
Empowerment
Triangle

Challenger

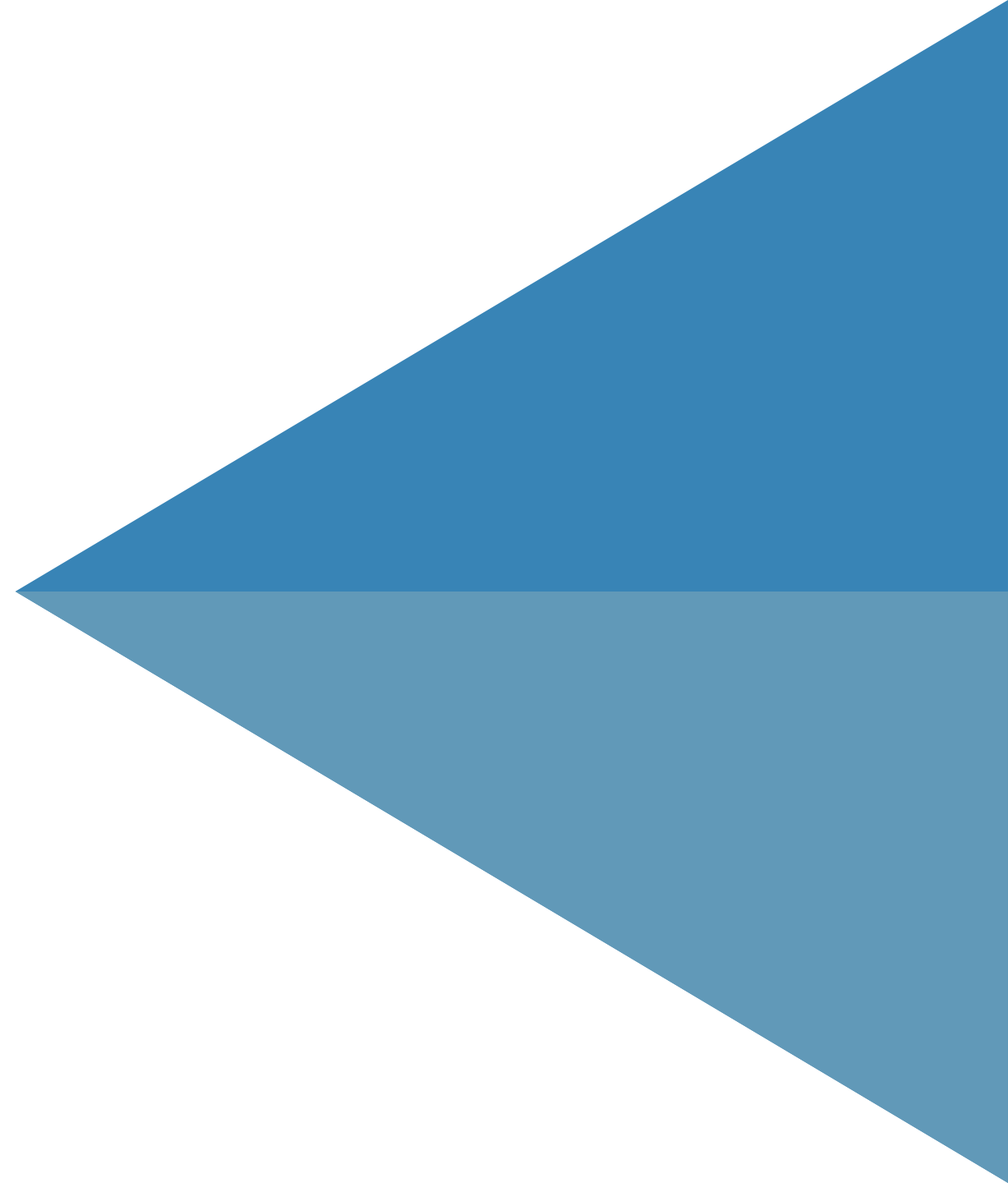


Coach



Visioning Activity

Dynamic Tension



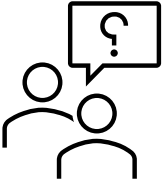
“By Me”

Creator



The
Empowerment
Triangle

Challenger



Coach

Creator

(former victim)

- Outcome focused
- Passion powered (in the flow)
- Pulled by a vision
- Focuses on what inspires them and what they do want
- Takes generative action, one step at a time
- Still experiences anxiety at times, but learns to move forward

Challenger

(former persecutor)

- Consciously builds others up
- Encourages learning and growth, despite difficult situations
- “truth teller” in service to outcomes and co-creates with whom they interact (creators)
- Provokes action
- Can be compassionate or confrontational (or both)
- Points towards opportunities for growth
- Constructive challengers are aware of what they are doing

Coach

(former rescuer)

- Sees the creator's essence and sees them as ultimately resourceful and resilient
- Non-attached to outcomes
- Uses curiosity, listening, and inquiring to support others discover what is best for themselves

Discussion question: In the short time you've been coaching, how has it allowed you to different impact the people in your life?



Coaching Approaches

	Below the Line (drama triangle)	Above the Line (empowerment triangle)
Attention	<ul style="list-style-type: none"> • What you don't want • Think/speak problems 	<ul style="list-style-type: none"> • What you do want • Envisions outcome
Intention	<ul style="list-style-type: none"> • Get rid of problems 	<ul style="list-style-type: none"> • Focuses on outcomes
Results	<ul style="list-style-type: none"> • Immediate/Short term • Reactive 	<ul style="list-style-type: none"> • Transformative/Long term • Responsive

ACTION PLAN

