

# INSIGHT LEADER TOOLKIT



KEY CONCEPTS	
<p><b>Team self-awareness</b></p>	<p>When teams commit to understand themselves at a collective level. Made up of <b>Five Cornerstones of Collective Insight</b>:</p> <ol style="list-style-type: none"> <li>1. <b>Objectives:</b> What are we trying to accomplish as a team?</li> <li>2. <b>Progress:</b> How well are we achieving our objectives?</li> <li>3. <b>Processes:</b> Is the way we're working helping us reach our objectives?</li> <li>4. <b>Assumptions:</b> Do the assumptions we're making about our business and environment hold true?</li> <li>5. <b>Contributions:</b> How is each team member impacting our performance?</li> </ol>
<p><b>Three building blocks for self-aware teams</b></p>	<p>Teams who want to achieve the five cornerstones need to focus on:</p> <ul style="list-style-type: none"> <li>• <b>The essential foundation:</b> A clear and compelling direction. As Alan Mulally of Boeing and Ford once said, if you don't have a vision and a plan, "the process of self-awareness is just talking."</li> <li>• <b>Building block 1: A leader who models the way.</b> When a leader is authentic and humble—confronting his/her flaws while striving to improve—the team is motivated to do the same. They see that it's not just okay but expected to honestly reflect on their contributions.             <ul style="list-style-type: none"> <li>○ <b>Exercise: Leader Feedback Process (page 5 of this guide).</b></li> </ul> </li> <li>• <b>Building block 2: The safety and expectation to tell the truth.</b> Psychological safety is the shared belief that it's okay for team members to ask each other for help, admit mistakes, and raise tough issues.             <ul style="list-style-type: none"> <li>○ <b>Exercise: Team Norms (page 7 of this guide).</b></li> </ul> </li> <li>• <b>Building block 3: An ongoing process to stay self-aware.</b> Team self-awareness can't happen without a daily commitment from everyone. Leaders should develop habits and processes to ensure feedback is being shared and tough truths are being confronted (like Alan Mulally's weekly Business Process Review; or Pixar's Ed Catmull's Notes Day and Peer Pirates).             <ul style="list-style-type: none"> <li>○ <b>Exercise: Team Candor Challenge (page 10 of this guide).</b></li> </ul> </li> </ul>

## Thanks for downloading the Insight Leader Toolkit!

To learn about the *Insight* book, get more resources, and take a free self-awareness quiz, go to [www.Insight-Book.com](http://www.Insight-Book.com)

**We have discounts and exclusive offers for corporate groups!** Email [michelle@theeurichgroup.com](mailto:michelle@theeurichgroup.com) or [tasha@tashaeurich.com](mailto:tasha@tashaeurich.com)

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## TEAM SELF-AWARENESS ASSESSMENT

This survey will help you understand how your team is doing with each of the three building blocks. As the team leader, you can certainly complete this on your own. But because the goal is collective insight, it's most powerful to engage your team. You can distribute this survey anonymously (via hard copy or web-based survey), collect and compile the results, and sit down to discuss what's working and how you can individually and collectively improve.

<i>For each item below, choose the response that best describes your team's current state.</i>	Very untrue	Untrue	Somewhat untrue	Somewhat true	True	Very true
1. Our team has a clear vision.	1	2	3	4	5	6
2. Our leader understands and communicates his/her most important values.	1	2	3	4	5	6
3. Team members respect each other.	1	2	3	4	5	6
4. Our team reviews progress on our strategy and plan and makes adjustments as needed.	1	2	3	4	5	6
5. Team members are genuinely excited about our vision.	1	2	3	4	5	6
6. Our leader behaves in a way that's consistent with his/her principles.	1	2	3	4	5	6
7. Team members genuinely care about each other as people.	1	2	3	4	5	6
8. Our team re-assesses our objectives in light of changes in our internal or external environment.	1	2	3	4	5	6
9. Our team has strategic objectives that clearly outline our key business priorities.	1	2	3	4	5	6
10. Our leader understands what we need from him/her and focuses on delivering it.	1	2	3	4	5	6
11. Team members aren't punished for being themselves.	1	2	3	4	5	6
12. Our team regularly evaluates the processes we're using to get our work done.	1	2	3	4	5	6
13. Our team has a strategy that guides how we should (and shouldn't) spend our time on a daily basis.	1	2	3	4	5	6
14. Our leader acknowledges his/her weaknesses and mistakes.	1	2	3	4	5	6
15. Team members feel safe bringing up problems and tough issues.	1	2	3	4	5	6
16. Our team takes the time to analyze our successes, our failures, and our assumptions.	1	2	3	4	5	6

	Very untrue	Untrue	Somewhat untrue	Somewhat true	True	Very true
17. Our team has a detailed plan to help us execute our strategy.	1	2	3	4	5	6
18. When our leader asks for feedback or new ideas, he/she truly listens to what we say.	1	2	3	4	5	6
19. Team members are willing to confront each other when issues arise.	1	2	3	4	5	6
20. Our team has a list of metrics that help us track our progress.	1	2	3	4	5	6
21. Each team member has accountability for implementing a portion of our plan.	1	2	3	4	5	6
22. Our leader serves as a role model for self-awareness in our team.	1	2	3	4	5	6
23. In our team, it's safe to take risks.	1	2	3	4	5	6
24. Team members give each other regular feedback on their contributions to the team.	1	2	3	4	5	6
25. We have clear metrics to assess how we're executing our plan.	1	2	3	4	5	6
26. Our leader is committed to helping us become a self-aware team.	1	2	3	4	5	6
27. Our team embraces mistakes as learning opportunities.	1	2	3	4	5	6
28. Team members are accountable for following through on the commitments they make.	1	2	3	4	5	6

Additional observations	
What's working	What needs to change

To score the assessment, transfer your answer for each question in the space below and add up the total for each column:

<b>Foundation:</b> A Clear and Compelling Direction	<b>Building Block 1:</b> A Leader Who Models the Way	<b>Building Block 2:</b> The Safety and Expectation to Tell the Truth	<b>Building Block 3:</b> An Ongoing Process to Stay Self-Aware
Question 1: _____	Question 2: _____	Question 3: _____	Question 4: _____
Question 5: _____	Question 6: _____	Question 7: _____	Question 8: _____
Question 9: _____	Question 10: _____	Question 11: _____	Question 12: _____
Question 13: _____	Question 14: _____	Question 15: _____	Question 16: _____
Question 17: _____	Question 18: _____	Question 19: _____	Question 20: _____
Question 21: _____	Question 22: _____	Question 23: _____	Question 24: _____
Question 25: _____	Question 26: _____	Question 27: _____	Question 28: _____

**Total:** \_\_\_\_\_

**Total:** \_\_\_\_\_

**Total:** \_\_\_\_\_

**Total:** \_\_\_\_\_

<b>Column Total</b>	<b>What it means</b>
7 - 18	This element is an issue that needs to be addressed. Though you have substantial room for improvement, the good news is that there may be low-hanging fruit. Using the tools provided below, your team should place a high priority on addressing this building block.
19 - 30	Though you have some traction for this building block, you have more to do to create a solid foundation. It would be smart to discuss what you can do to strengthen this element using the resources that follow.
31 - 42	You have a solid foundation for this building block in your team—you might focus on where you can create additional improvements or becoming more disciplined and consistent around the things you're already doing well.

In the pages that follow, you'll find three exercises to help you make tangible improvements in each building block.

<u>Building Block 1</u> A Leader Who Models the Way <b>The Leader Feedback Process</b>	<u>Building Block 2</u> The Safety and Expectation to Tell the Truth <b>Team Norms</b>	<u>Building Block 3</u> An Ongoing Process to Stay Self-Aware <b>Team Candor Challenge</b>
<p><b>Foundation:</b> A clear and compelling direction</p> <p>If you're interested a great strategy resource, I suggest <i>Becoming a Strategic Leader</i>—it's written by my colleagues at the Center for Creative Leadership. For a finer-grained look at executing a strategy, I'd suggest anything written by Ram Charan, such as <i>Execution</i> and <i>Confronting Reality</i>.</p>		

The Leader Feedback Process will help you model self-awareness for your team. Use the step-by-step guide below to help you complete the exercise.

Action	Detail
Setting up the meeting	<p>Set aside between 2 and 4 hours for the conversation. It's best to hold the meeting offsite or in a private, quiet room.</p> <p>Ideally, retain the services of a skilled facilitator.</p> <p>Come prepared with several flipcharts and plenty of markers.</p> <p>Prepare a flipchart listing the following ground rules:</p> <ul style="list-style-type: none"> <li>• Full participation from everyone.</li> <li>• No constructive comment is off limits.</li> <li>• All comments are strictly confidential.</li> </ul> <p>Prepare one flipchart for each question below (though if your meeting is less than 3 hours, you may want to focus on just 4-5 questions):</p> <ul style="list-style-type: none"> <li>• What do we know about [our leader's name]?</li> <li>• What do we want to know about [leader]?</li> <li>• What should [leader] know about us as a team?</li> <li>• What concerns do we have about [leader]?</li> <li>• What expectations do we have of [leader]?</li> <li>• What do we want [leader] to stop doing, start doing, and continue doing?</li> <li>• What feedback do we have about our vision, strategy, and plan?</li> </ul>
Teeing up the exercise  (5-10 minutes)	<p>Leader, explain that the objective is to work better and more efficiently together. The specific goals of the exercise are:</p> <ul style="list-style-type: none"> <li>• For them to learn more about what makes you, the leader, tick.</li> <li>• For you to better understand the team's key issues and opportunities.</li> <li>• For you to get feedback on what you're doing that's working and what could be different/better.</li> </ul> <p>Leader, review ground rules and explain that you will leave the room so the facilitator can lead the feedback conversation.</p> <ul style="list-style-type: none"> <li>• Make sure to say, "I have instructed [facilitator's name] that under no circumstances is he/she to tell me who said what."</li> <li>• Thank the team and leave the room.</li> </ul>
Leader feedback  (45-90 minutes)	<p>Facilitator, starting with the first question, ask for and record responses. Once there are no more answers to a question, move to the next (and so on).</p> <p>Facilitator, when finished, give the team a 10-15-minute break outside of the meeting room.</p> <p>Facilitator and leader, take a few minutes to read the team's answers and clarify as necessary.</p> <p>Leader, remember to remain calm and non-defensive in the next part of the discussion.</p>

<p>Team conversation  (60-90 minutes)</p>	<p>Leader, before diving into the feedback, spend 10 or so minutes sharing information to help the team get to know you better and more holistically—things like:</p> <ul style="list-style-type: none"> <li>• Background, where you grew up, where you went to school.</li> <li>• Most important values.</li> <li>• Key events in your life that shaped you into who you are.</li> <li>• Biggest mistakes.</li> <li>• Family, hobbies, personal life.</li> </ul> <p>Leader, respond to each question (in order). A few tips:</p> <ul style="list-style-type: none"> <li>• Where needed, ask the team for clarification.</li> <li>• Address all comments and answer all questions to the best of your ability (and if you can't answer a question, say why).</li> <li>• Together with the team, come up with a plan to respond to issues that have surfaced in the conversation.</li> </ul>
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Below is a worksheet for you, the leader, to take notes on your key lessons and take-aways.  
(Extra credit if you share this with your team!)

<p style="text-align: center;">What I'm doing that's working</p>	<p style="text-align: center;">What behaviors I need to change</p>
<p style="text-align: center;">My commitments to myself and the team</p>	<p style="text-align: center;">My immediate next steps</p>

Team norms will help you agree on your rules for engagement. For example, what behaviors will help you achieve your strategy efficiently, effectively and enjoyably? What kind of environment do you want to create? What do you need to do to ensure there is a psychologically safe and supportive culture in the team? The process is relatively simple. Set aside between 1 and 2 hours for a team meeting, ideally in a location where you won't be disturbed and can speak freely.

1. As a team, start by brainstorming answers to the following questions:

<p>What do we need to <u>start</u> doing to make this a better team?</p>	<p>What do we need to <u>stop</u> doing to make this a better team?</p>	<p>What do we need to <u>continue</u> doing as a team that's working well?</p>
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2. Next, narrow down your list by asking: if we each had to choose just one behavior to become a better team, what would it be?

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3. Now that you've zeroed in on the behaviors that will help your team be most successful, it's time to agree on 3 to 5 norms, as well as a few examples of what each looks like in action (for example, if "communication" is a norm, make sure you agree on what specific behaviors will show that team members are communicating well).

Team Norm	Behavioral Examples
1.	
2.	
3.	

4.	
5.	

4. The last step is to agree on what your team will do to make sure your norms are living, breathing, and guide the team's day-to-day behavior (versus being something you stuff in a drawer). Below, list at least 3 follow-up actions you'll take to make sure you're sticking to your norms. For example, your team might decide to post them in your conference room, or on meeting agendas, or spend time at the end of each meeting discussing where you did (and didn't) follow them.

1.
2.
3.
4.
5.

The Team Candor Challenge has two phases:

1. **Team Feedback Exchange:** In one intensive session, each team member will get the chance to receive feedback on their strengths, their weaknesses and what they can do to better contribute to the team’s success. The feedback exchange should be held no more than once every six months and no less than once a year.
2. **Accountability Conversations:** Following the Team Feedback Exchange, the team will continue to have regular discussions to ensure ongoing accountability and awareness. Ideally, these are held monthly.

<b>Step 1: Team Feedback Exchange</b>	
Phase	Instructions
<p>Setting up the meeting</p> <p>(At least 2 weeks in advance)</p>	<p>Set aside 3 to 4 hours for the conversation.</p> <p>It’s best to hold the meeting offsite in a private, quiet room.</p> <p>Identify a facilitator for the meeting.</p> <ul style="list-style-type: none"> <li>• This is ideally someone with expertise in group dynamics (an organizational psychologist, HR professional, etc.), or it can be a team member who is trusted, socially savvy, and neither the most senior nor the most junior member.</li> <li>• For groups larger than 5, it’s worth investing in a trained facilitator.</li> </ul> <p>Review and discuss the Team Feedback Exchange Worksheet (page 13 of this guide).</p> <p>At least 2 weeks before the meeting, the leader should give the team members a heads-up about the exercise and how it will help them get and stay self-aware. Ask them to begin thinking about what each person brings to the team, what each person could do to improve, and what they personally need from each team member to be successful.</p> <p>Before the meeting, the facilitator should find a few flipcharts and markers.</p> <ul style="list-style-type: none"> <li>• On one flipchart, write “Process: 20 minutes per person.”                         <ul style="list-style-type: none"> <li>▪ Prepare feedback.</li> <li>▪ Deliver Question 1 feedback (30 seconds per answer).</li> <li>▪ Deliver Questions 2 and 3 feedback (30 seconds per answer).</li> <li>▪ Questions for clarification.</li> </ul> </li> <li>• On a second flipchart, write “Three Questions.”                         <ul style="list-style-type: none"> <li>▪ What, behaviorally, does this person do that most contributes to our success?</li> <li>▪ If this person could change one behavior to be more successful, what would it be?</li> <li>▪ What behavior do I need from this person to help me be more successful?</li> </ul> </li> <li>• On a third flipchart, write “Ground Rules.”                         <ul style="list-style-type: none"> <li>▪ Getting feedback:                                 <ol style="list-style-type: none"> <li>1. No push-back or defensiveness: be curious, remember that perception is reality.</li> <li>2. Take notes and ask questions only for clarification.</li> </ol> </li> </ul> </li> </ul>

	<ol style="list-style-type: none"> <li>3. Be open-minded and assume good intentions.</li> <li>4. Thank your team members. Giving feedback isn't easy! <ul style="list-style-type: none"> <li>o Giving feedback: <ol style="list-style-type: none"> <li>1. Avoid generalities ("you always" or "you never").</li> <li>2. Focus on the behavior rather than the person.</li> <li>3. Don't give your interpretations of others' behavior—just the behavior itself.</li> <li>4. Provide examples.</li> </ol> </li> </ul> </li> </ol>
<p>Kick-off the meeting</p> <p>(15 minutes)</p>	<p>Leader, welcome team, re-state the goal of the exercise, explain the high-level process, and outline the role of the facilitator (to keep the discussion productive and on track).</p> <p>Facilitator, review the "Process" flipchart:</p> <ul style="list-style-type: none"> <li>• Team members will be randomly assigned into one of three groups, and the exercise will take place in rounds, with short breaks in between.</li> <li>• Each person will give feedback to each other person by answering three specific questions.</li> <li>• Everyone will have the chance to get clarification on the feedback they get at the end of their turn.</li> <li>• We'll save some time at the end to process, debrief, and make commitments to each other.</li> </ul> <p>Facilitator, review the "Three Questions" flipchart:</p> <ul style="list-style-type: none"> <li>• The purpose of this exercise isn't to tell each other everything we think about one another—it's to give everyone one piece of valuable feedback for each question.</li> <li>• Thus, answers to each of question should be about 30 seconds.</li> </ul> <p>Facilitator, review the "Ground Rules" flipchart.</p> <ul style="list-style-type: none"> <li>• Explain that when giving feedback, they should focus on specific behaviors: examples of <u>what the person has said</u>, <u>how they said it</u>, or <u>what they did</u> rather than generalities or interpretations. This not only helps to prevent defensiveness and unproductive emotions but also helps people understand the feedback better. Example: <ul style="list-style-type: none"> <li>▪ <u>Don't say</u>: "In our last team meeting, you were being aggressive."</li> <li>▪ <u>Do say</u>: "In our last meeting, you interrupted me three times and raised your voice each time."</li> </ul> </li> </ul>
<p>Team feedback</p> <p>(This will take ~20 minutes per person. So, for 9 people, the time would be 3 hours)</p>	<p>Facilitator, ask for and answer any questions from the team.</p> <p>Facilitator, ask for 3 volunteers to be in group 1, followed by group 2, etc. (It's usually best if the leader goes towards the end.)</p> <ul style="list-style-type: none"> <li>• Depending on how many people are on your team, the schedule might look something like this: <ul style="list-style-type: none"> <li>▪ Group 1: Person A, Person B, Person C, then a 5-minute break.</li> <li>▪ Group 2: Person D, Person E, Person F, then a 5-minute break.</li> <li>▪ Group 3: Person G (Leader), Person H, Person I, then a 5-minute break.</li> </ul> </li> </ul> <p>Facilitator, begin with group 1.</p> <ul style="list-style-type: none"> <li>• Ask everyone to spend a few minutes writing out their feedback for each person in group 1.</li> <li>• Go around the room and have each team member deliver their answers to question 1 for Person A, <u>then</u> questions 2 and 3 for Person A.</li> </ul>

	<ul style="list-style-type: none"> <li>• Person A asks any questions for clarification about the feedback.</li> <li>• Then repeat the process for Person B, then Person C, followed by a break.</li> <li>• Continue with all groups until everyone has had their turn.</li> </ul>
<p>Commitments and next steps</p> <p>(30-45 minutes)</p>	<p>Facilitator, ask each team member to spend a few minutes reviewing the feedback they received and come up with ONE commitment they'll make to their fellow team members. Then, have each person share their commitment to the group.</p> <p>Facilitator and leader, ask the group for their ideas on how to build on today's progress—also known as Accountability Conversations.</p> <ul style="list-style-type: none"> <li>• Question: "What can we commit to today to ensure that each of us is not only making good on our own commitment, but also giving each team member ongoing feedback on how they're doing?" For example, you might agree to spend 30 minutes every month discussing the progress each person is making.</li> </ul>
<p><b>Step 2: Accountability Conversations</b></p>	
<p>Sample agenda for monthly accountability conversations</p>	<p>Each person...</p> <ul style="list-style-type: none"> <li>• Provides an update on the actions they've taken to make good on their commitment since the team's last discussion.</li> <li>• Requests feedback on how they're doing on their commitment.</li> <li>• Asks the team for support as needed.</li> </ul> <p>Remember that these conversations aren't an excuse wait to give feedback. Team members should also point out, in real time, when they see behavior that either supports or contradicts each team member's commitment!</p>

*On the following pages, you'll find a worksheet to complete the Team Feedback Exchange.*

## Team Feedback Exchange Worksheet

1. First, divide up your team into groups of 3 (use up to 5 groups with a maximum of 15 people).

Group 1	1.  2.  3.
Group 2	1.  2.  3.
Group 3	1.  2.  3.

Group 4	1.  2.  3.
Group 5	1.  2.  3.

2. Give each team member several copies of the next page to help them compile their feedback (just print as many sheets as you need to have one for every person getting feedback).

<b>Name:</b>		
1. What, behaviorally, does this person do that most contributes to our success?	2. If this person could change one behavior to be more successful, what would it be?	3. What behavior do I need from this person to help me be more successful?
<b>Name:</b>		
1. What, behaviorally, does this person do that most contributes to our success?	2. If this person could change one behavior to be more successful, what would it be?	3. What behavior do I need from this person to help me be more successful?
<b>Name</b>		
1. What, behaviorally, does this person do that most contributes to our success?	2. If this person could change one behavior to be more successful, what would it be?	3. What behavior do I need from this person to help me be more successful?

Each person should use this form to take notes while they're getting feedback:

What I'm doing that's working	What behaviors I need to work on
What my team members need from me for them to be successful	
My commitment to the team	