5

DIALOGUE TOOLS
These tools have been written in a way that should make it possible for a team to take them on without any help from someone outside of the team. But if you feel that there are times when it would be better to have a professional facilitator or coach to support you do not be afraid to ask for help! Such help can release you from the burden of hosting the process and allow you to focus on your own participation in the process yourself.

Every tool is written in a way that can be easily copied and brought to the team to read and work with. Each tool consists of a short introduction, purpose and objective, what to do step by step, and includes handouts if needed.

Most of these tools take 30 – 60 minutes to complete, with some exceptions which may extend to half day, or even full day workshops.

There is no specific order in how to use them, but they do connect and could support each other. Together they give you a good foundation to grow a desired team culture.

When working with the tools, please try to put them into a larger context and in a plan that stretches over an extended period of time, e.g. 6 to 18 months. This will increase your ability to grow and maintain your desired culture.

This whole book, supporting slides and related material can be downloaded free of charge at www.valuescentre.com/getconnected. This site also contains information on how to contact coaches and facilitators.

### The tools to Get Connected:

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STAKEHOLDER ANALYSIS

Session Leader Guide

A team always has other people who have a stake in the output or purpose of their work. They are called stakeholders, who all have their unique needs and demands, expectations and relationship with the team. To acquire a good picture of all the key stakeholders and their specific demands and expectations it may be wise to make a "stakeholder analysis". The value created by the team can be viewed from different perspectives and it is sometimes almost impossible to foresee all demands and expectations without involving the key stakeholders in a dialogue or discussion to gain a better and shared picture of the present situation.

PURPOSE
To map, review, involve and define the requirements and expectations from the key stakeholders of your change initiative.

OBJECTIVE
At the end of the exercise everyone should have a clear and mutual view of your key stakeholders and their requirements and expectations.

TIME
You will need 45 minutes for preparation and first draft of the stakeholder analysis. After that it depends on how many stakeholders you will meet; estimate 30-60 minutes per stakeholder. Then you need about 60 minutes for analysis and planning.

BEFORE THE SESSION
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you intend to use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation at least two weeks before your meeting and include any 'prework' material if you find it useful to come better prepared. Communicate purpose and objective, when, where, and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected.
6. Make sure the meeting room is ready with all the material needed.
7. If you intend to use a meeting evaluation or reflection, have it prepared in advance. (see page 172)
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.
DURING THE SESSION

1. Introduce the purpose and objective of this exercise.
2. Explain the need to identify our stakeholders and the requirements and expectations they have on us and our team or our performance.
3. Ask everyone to find a blank piece of paper to map out your key stakeholders. Start by writing yourself or your team in the middle of the paper.
4. Identify every person or group of persons you think has an interest in your team or performance. Who are most important? Number them in order of importance for you.
5. Use symbols such as "+", "-" or "?" to indicate if they are positive, negative or indifferent. How do they influence?
6. Define what requirements and expectations you have on them – and write what you think their demands are on you or our team performance.
7. ALTERNATIVE: Follow the same steps described above. However, rather than using just a blank piece of paper, you can plot your stakeholders on an Interest/Influence map as depicted below.

![Interest/Influence Map](image)

This will help you to better segment your stakeholders and to define strategies to handle them in the best way.

8. After everyone has completed their own personal stakeholder map, ask them to pair up in groups of 2 -5 persons. Share your maps, and identify and create one stakeholder map that describes your whole team. Ask each team to present their collective results. Collect each group’s collective maps, in order to consolidate into a whole team map, if needed.
9. Invite them to a team reflection (see page 165) about the exercise. What has become clear to them? Any learnings, questions or concerns. Explain what the next steps are after this meeting. Any expectations from the team on the next steps?

AFTER THE SESSION

1. Make appointments with and meet all key stakeholders to check your relationship. The purpose with the meeting with your key stakeholders is to explore, rather than to explain. Have a dialogue about mutual requirements and agreements. What are the consequences of the discussion?
2. Make your analysis by yourself or preferably with your team. How should you handle the negative and positive forces? What will you do with conflicting requirements and expectations? Prepare your own action plan.
CONNECT TO THE CUSTOMER

Session Leader Guide

The more we can visualize the purpose of our work efforts in terms of how our solution will add value to our customer – the better we can understand and commit to the team goals. A good understanding of where our solution fits into the customer business operations and his/her intention and long term objectives will get us better connected to the customer and enhance the collaboration.

Additional benefits are that it can enhance the customer co-operation/dialogue, increase our ability to manage the customer requirements and enable us to work more proactively.

PURPOSE
To create a better understanding of how our solutions and performance will best contribute to the customer business operations.
To provide all stakeholders with an overall common purpose with the team, which will facilitate the customer cooperation/dialogue.

OBJECTIVE
A shared understanding and description of how the team connects to the customer vision and objectives in terms of Direction, Prerequisites and Dialogue.

PARTICIPANTS
The more team members that can participate the better. To provide value to the team, the minimum participants should be the team leader, 2-3 team members and customer representative(s).

TIME
The estimated time for this exercise is 3 – 4 hours depending on the size and complexity of the team and if it involves a visit to the customer premises.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with your manager/chairman of the team and, where appropriate, with the Customer Account Manager.
2. Anchor the decision to do the exercise with your Customer.
3. Define who, when and where and book a meeting room.
4. Send out invitations at least two weeks before your meeting. Communicate meeting Purpose and Objective, when, where and who. Enclose the Agenda.
5. Prepare or select slides you intend to use
6. Make sure the meeting room is ready with all the material needed. You don’t need more than a laptop, pc-projector and copies of the worksheets as handouts.
7. If you intend to use a meeting evaluation, have it prepared in advance (see page 172).
8. Try to come at least 30 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.
DIALOGUE TOOLS

**DURING THE SESSION**
1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting and ask if everyone will be able to stay during the whole meeting.
2. Introduce the exercise by reading out the steps to be taken. Clarify how you intend to use the material after the session. Make sure everyone understands the exercise. Give the opportunity for questions and concerns.
3. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
4. Conclude the exercise by reading out your final conclusions. Clarify agreed actions by addressing who, when and how. Communicate the intended next steps.

**AFTER THE SESSION**
1. Document the outcome of the workshop (use the template if appropriate).
2. Write and send out minutes as soon as possible after the meeting. Enclose the documentation with the outcome and also slides that were shown (if requested by any of the participants).
3. Now that you have started to create a shared understanding of how to get connected with the customer, plan for a dialogue with your team as to how to align the team behaviour and priorities.
# Agenda
(proposal and facilitator notes)

1. **Introduction of the exercise**
   - **15 min**

2. **“Guided tour” at the Customer premises (optional)**
   - **60 – 120 min**
   To create a better understanding of the current situation and the user priorities, meet the users of your products or solutions and view the physical environment where it will impact.

3. **Individual Reflection**
   - **15 min**
   “Recall an occasion when you participated in a team where the collaboration with the customer was working perfectly.” What made it happen? Who was involved? What was the feeling and outcome of this team?

4. **Presentation of the Customer View**
   - **30 min**
   The customer presents Vision & Objectives, Priorities & Restrictions and Enablers & Critical Success Factors from his/her perspective. Allow questions for clarification during the presentation. Note down this information on flip chart(s). Put the flip chart(s) on a wall, where everyone can read it. (Use the template on page 65 if you want)

5. **Group Reflection**
   - **60 min**
   “How can your team meet and connect to the Customer View?” Note down the different responses on flip chart(s) under the heading “CONNECT” as they come up. Verify the responses towards the customer view and note where they are shared and agreed upon.

6. **Evaluation of the Exercise**
   - **15 min**
   “How did the exercise contribute to a shared view and understanding of the team, priorities, prerequisites and dialogue?” What have we learned as individuals and as a team? What are the key issues to bring with us in our future work together?

7. **Conclusion & End Up**
   - **15 min**
   Conclude the exercise by expressing your appreciation to the customer and the other participants.
## Connecting the Customer to the Team View

<table>
<thead>
<tr>
<th>CUSTOMER</th>
<th>&lt;-- CONNECT --&gt;</th>
<th>TEAM VIEW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision &amp; Objectives</td>
<td>Why do we exist as a team?</td>
<td>Direction</td>
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<td>Priorities &amp; Restrictions</td>
<td>What do we need to pay</td>
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<td>Enablers &amp; Critical Success Factors</td>
<td>How should we create a cooperative working climate?</td>
<td>Dialogue</td>
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OPEN SPACE
Session Leader Guide

Working within an “Open Space” is meant to offer an open, creative exploration into topics that people choose to be relevant and important within a certain, defined, context. The agenda-items are often created on the spot. This, the open space facilitates a joint process for organizations and/or groups to identify passions and concerns, share and learn from each others’ experience to find meaning and creative approaches. The method works best in a situation when the following criteria are being met: a real need to explore, a diverse participation, complexity, both responsibility and passion (and/or conflict) and a need to move on. This approach is not to be used when desired outcomes are already determined or when sponsors aren’t prepared to take the meeting-outcomes into account.

PURPOSE
Open space offers a participative platform, where within a limited time-frame, a medium or a larger group of people, explores complex issues or a transformative topic and comes to deeper, shared understanding and potentially recommendations.

OBJECTIVE
At the end of this session this exploration might lead to a more connected picture of reality, shared understanding and sometimes recommended elements for building a new vision or a new approach, where multiple stakeholders will be taken into consideration.

TIME
The estimated time for this exercise is approx. 1 – 2 hours.

BEFORE THE SESSION
1. Prepare the session by exploring if/how it will contribute to a certain situation. It is important to ensure that the success-criteria are being met and that various stakeholders will participate during the session.
2. Define participant-group (there could be 20-1000) and book a meeting room with enough space to create a “market place”: moving chairs around in order to sit in small groups and reporting back from different sides of the room. There should be numerous ways to capture information, for example on whiteboards or flipcharts.
3. Decide whether you or a guest speaker will introduce the workshop and/or create the right atmosphere.
4. Send out an invitation, communicate purpose and objective, when, where, and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected or search the web for open space technology.
6. Make sure the meeting room is ready with all the support material needed.
7. If you intend to use a meeting evaluation or reflection-sheet, have it prepared in advance (see page 172).
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and an agenda with time-schedule on one or multiple flipcharts so that everyone can see it during your whole session.
DIALOGUE TOOLS

DURING THE SESSION

1. Present the purpose and approach of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the sponsor or manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their view.
3. Introduce the exercise by sharing the 4 open space principles and the process steps to be taken.
   Speak about the open space principles and roles:
   a. Whoever comes to join your topic-group, are the right people.
   b. Whatever happens is the right thing
   c. When it starts is the right time; some groups might split and/or start during the session, that is all welcomed: we do ask that the wall-agenda captures the groups/topics, for people to be able to identify where the want to go (next)
   d. When it's over, it's over: there's no need to keep on talking if a group feels that the conversation has delivered the defined outcome;

Then there's also certain roles and the law of two feet.

The law of two feet: in case you feel that you need to move topic/group, please do. This creates both butterflies (participants that go in and out of a session to individually reflect) and humblebees (someone "hopping" from one session to another, sharing ideas and insights between groups).

Other roles are: an initiator or sponsor for the overall meeting, a convener: someone who calls a certain topic to be discussed and puts it on the agenda - often this person is also reporter for the conversation in that particular dialogue session.

A report is created during/after the dialogue and will be captured in some form at the end of the session.

AFTER THE SESSION

Make sure actions are taken to meet the reporting back and follow up on the commitments that came out of the meeting.
Agenda
(proposal and facilitator notes)

1. Introduction 15 min
Go through purpose, objective, principles and open a place for agenda-items to be posted. Be open for questions.

2. Small Group Dialogue 30 – 60 min
Form groups of 4-15 persons and ask the participants to share their thoughts and experiences around this topic, as well as invite ideas. Make sure that each participant is invited to share and point out that it is the dialogue itself that is as important as any outcomes.

Steps to take
- Present the small group approach and roles
- Open a “market place” agenda eg on the wall for topics to be posted
- Allow time (or break) for people to form groups and define how long the dialogue sessions will take (eg 45 mins). Each of the groups to be in a visible place, preferably all in the same room.
- For the small groups the instruction needs to be that there is someone that facilitates the conversation and someone to capture the outcomes. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember that the process of a joint sharing is as important as the outcome.
- Conclude the small group exercise with a shared reflection of the experience and learnings. Some groups prefer a creative reflection eg in the form of a visual, even a cartoonist or poet to shine a light on the work as well.
- Allow time in the plenary for a debrief of the experience. This could be a reflection on the process, comments from the audience, but is not necessarily a report from each of the small groups.

3. Whole Group Reflection 15 min
Have the group reflect on what was the major thing they learned and took away from this exercise?
Throughout life we all have good days and bad days. With everything going on around us in our daily work we all know that changes is a way of life, and we all react differently to change. As a team you either drive change or work to take on changes. It is very common that we judge the expected reaction from others based on our own thoughts and feelings.

During turbulent times of change or if you are unsure of what is going on “beneath the surface” in your team, you could make it a habit to ask these “Important Questions”. This will give you and the team a better, updated picture of how your group feels and thinks at the moment, and we advise you start your meetings with these opening diagnostic questions especially when your team goes through more difficult times.

If you make it a habit of asking these questions even under “normal” times, it provides you and your team with a base for more connectivity and learning, and it will help to bond your team and make them more viable and independent.

The important questions are:
1. How are you feeling right now? How do you think your colleagues feel?
2. If any, what are your major "energy leaks" today? What about your colleagues?
3. What is the most important question for you right now?

PURPOSE
To create a better and mutual understanding of the group’s present concerns, feelings and expectations. To surface individual and collective needs for action to deal with the current situation in the best way.

OBJECTIVE
At the end of this exercise you should be able to listen better and align your planned actions.

TIME
You will need 20-30 minutes, including the introduction, exercise and reflection. The time will differ depending on how often you ask these important questions, the scope of the change your team faces at the moment, the level of trust in the group, etc.
**STEPS TO TAKE**

1. After completing the introduction phase of your meeting (e.g. Purpose, Objective and Agenda) you should explain the purpose of this exercise.
2. Write the three Important Questions on the whiteboard or flipchart.
3. Give everyone a few minutes to reflect individually on these questions and write down their answers on a piece of paper. After a while, encourage the group to share in pairs what they have written. Close by sharing your reflections with the whole group. Write key comments and conclusions on the whiteboard or flipchart so that everyone can read them.
4. NB! If the level of trust is low or has not been developed yet in the team, then have the team only discuss and share question number 3. Make the other two questions optional to share if they want to.
5. Take time to really understand what is being said. Ask for clarification and paraphrase to ensure that both you and your group have understood what has been said.
6. If the response and reaction is very strong to these questions, you may need to reconsider your original agenda and spend the rest of the meeting trying to understand and listening to the group's concerns. Remember, you do not need an answer to all questions. If you are unable to answer, say so. It is also important that you show integrity and are consistent in your beliefs and messages. The key purpose of the meeting is to listen and show you care.
7. Conclude the session by reading aloud your conclusions from what has been discussed and when and how you intend to revert to the issues. Be open to comments and adjustments.

**AFTER THE SESSION**

1. As the leaders of the team, reflect upon the outcome of what your team has shared. What are their key concerns, questions, dreams and desire at this moment? Where is their energy and focus? How do you need to respond as a leader to this? What actions, support and leadership is needed at this moment to take your team further and grow and develop?
2. Make sure the collected call for answers and actions are addressed (individually and/or collectively). Make sure you meet the expected commitments you have made.
3. Ask for help, if needed.
CORE MOTIVATION

Session Leader Guide

This exercise helps individuals and groups to discover what is important to them about their work and what motivates them at their deepest level.

The exercise is based on Richard Barrett’s book “Liberating the Corporate Soul”.

PURPOSE
To clarify the relationship between the team members’ personal and organizational motivations.

OBJECTIVE
A shared understanding of what motivates the individual team members to bring their whole selves to work.

TIME
The estimated time for this exercise is approx. 1 – 2 hours.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. Make sure that the room makes it possible to split up the group into pairs and work in pairs in an acceptable way.
4. Send out the invitations for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find suggested slides at www.valuescentre.com/getconnected.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
7. Try to come at least 20 minutes before everyone else.
8. Make sure that you have printed hand outs for all participants.
9. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION
1. Hand out the Core Motivation Exercise sheet to each person.
2. Instruct each person to fill in the answer to ‘I go to work each day at _______ because I want to ……….’ without using bullet points or itemised lists. One sentence only!
3. Once completed, have each person find a partner.
4. Partner B gives his or her sheet to Partner A. Partner A is then responsible for being the coach as well as the scribe for Partner B.
5. Have Partner A ask Partner B to complete the sentence “Why do you want to…then read Partner B’s sentence…?” Partner A helps Partner B get clear as to what that answer is, then writes it down and reads it back for confirmation. Tell the participants that they can be probing their partner for a deeper meaning. Partner A also coaches Partner B in language and ideas. Focus shall be both challenge and support. Explore together!
6. They then change roles and repeat the process with Partner B interviewing Partner A.
7. Repeat the process a third and a fourth time if necessary until they are both satisfied that they have clearly and succinctly identified their respective core motivations. Once completed, the interviewing partner returns the paper to the interviewee.
8. The group reconvenes. Ask everyone to listen and hold back any comments. Voluntarily have each person read his or her answer that most accurately describes their core motivation. It does NOT have to be the last response on their paper.
9. Have the group reflect on the collective answers and what motivates us as a group and as individuals.
10. Ask for comments on the process – what they felt, what they got out of the exercise.

AFTER THE SESSION
1. Write and send out any minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).
2. How do you intend to follow up the session? A good idea is to plan a follow-up discussion and an individual follow-up at your annual performance review meeting with the participants.
3. Consider what steps you want to take next. For example the exercise “Personal 4 Whys” could be an appropriate exercise now while the group has a fresh experience of this exercise and thereby the thinking and emotions related to it.
Agenda
(proposal and facilitator notes)

1. Introduction of the exercise 15 min
   Go through Purpose, Objective and Agenda. Be open to questions.

2. Individual reflection of Core Motivation 15 - 30 min
   Distribute the hand-outs including the Core Motivation template and example. Ask the participants to reflect and note down their personal Core Motivation statement.

3. Completion of the Core Motivation statement 30 – 60 min
   Ask the participants to select a partner and let them complete the forms according to the instructions.

4. Group Dialogue 15 min
   Ask for volunteers to share their results with the larger group.
   It is beneficial if everyone wants to do this.

5. Reflection 15 min
   Have the group reflect on what was the major thing they learned and will take away from this exercise?
### Core Motivation Question

I go to work each day at ________________________ because I want to:

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PERSONAL 4 WHYS
Session Leader Guide

This exercise helps individuals in a group to create their personal vision and mission. The exercise is based on Richard Barrett’s book “Liberating the Corporate Soul”.

PURPOSE
To create mission and vision statements for the individual team members.
To clarify the relationship between the individual team members’ personal vision and mission and how that can contribute to society.

OBJECTIVE
A shared understanding of the alignment between what motivates the individual team members and how they want to make a difference in society and in the world.

TIME
The estimated time for this exercise is approx. 1 – 2 hours.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. Make sure that the room makes it possible to split up the group to work in pairs in an acceptable way.
4. Send out the invitations for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved. If the group has done the Core Motivation exercise, ask them to bring the result to this exercise.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find suggested slides at www.valuescentre.com/getconnected.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
7. Try to come at least 20 minutes before everyone else.
8. Make sure that you have printed sufficient hand outs for all participants.
9. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.
## DURING THE SESSION
1. Hand out the 4 Whys template showing the four quadrants of the model and explain what each quadrant represents.
2. Ask the team members to start to define their Personal Mission by answering the questions in the template. 
   a) What is your professional purpose? and 
   b) What do you need to do in order to grow and develop as a professional? Get them to write their answers in the form.
3. Ask the team members to select a partner with whom they will exchange their Personal Mission statements.
4. Let the partners interview each other on what each has defined as their respective Personal Mission.
5. The interviewing partner should start by asking question 
   c) Why do you want to fulfil your Personal Mission for yourself? ……note the answer down as ‘Personal Vision’.
   The partners then change roles so that the interviewer becomes the interviewee.
6. When each partner is satisfied that he/she has expressed their Personal Missions, they then repeat the process for the ‘External Mission’ by answering the question 
   d) Why do you want to fulfil your Personal Mission for your stakeholders/customers?
7. When both partners are satisfied with their External Missions, again repeat the process for the ‘External Vision’ by answering the question 
   e) Why do you want to fulfil your Personal Vision and External Mission and bring benefit to society?
8. Once the form is completely filled out, let the small group verify what they have defined. They do this by going through the statements in the opposite order, External Vision --> External Mission --> Personal Vision --> Personal Mission, changing the Why in the questions to ‘How’. E.g. the answer to the question 
   e) ‘How do you want to fulfil your External Vision and bring benefit to society?’ should be answered by the External Mission and Personal Vision statements.
9. Gather the team for a group reflection. Ask everyone to listen and hold back any comments. Have each person read his or her mission and vision statements.
10. Ask for comments on the process – what they felt, what they got out of the exercise.

## AFTER THE SESSION
1. Write and send out minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).
2. How do you intend to follow up the session? A good idea is to plan a follow up discussion and an individual follow up at your annual performance review meeting with the participants.
3. Consider what steps you want to take next. For example the exercise “Team 4 Whys” would be an appropriate exercise while the group still has this ‘Personal 4 Whys’ exercise, and also the thinking and emotions related to it, fresh in their minds.
### Agenda

**1. Introduction of the exercise** 15 min
Go through Purpose, Objective and Agenda. Be open to questions.

**2. Individual reflection of Personal Mission** 10 min
Distribute the handouts incl. the Personal 4 Whys template and example. Ask the participants to reflect and note down their Personal Mission. If the participants have done the Core Motivation and brought their result, they can use that result as the basis.

**3. Completion of the 4 Whys template** 30 – 60 min
Ask the participants to select a partner and let them complete the forms according to the instructions and example.

**4. Group Dialogue** 15 min
Ask for volunteers to share their results in the bigger group. It is beneficial for everyone to do this.

**5. Reflection** 15 min
Have the group reflect on what was the major thing they learned and took away from this exercise?
## Mission and Vision statements
Personal 4 Whys – Exercise

<table>
<thead>
<tr>
<th>Personal Vision</th>
<th>External Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Mission</strong></td>
<td><strong>External Mission</strong></td>
</tr>
<tr>
<td>a) What is your professional purpose?</td>
<td>d) Why do you want to fulfil your Personal Mission for your stakeholders/customers?</td>
</tr>
<tr>
<td>b) What do you need to do in order to grow and develop as a professional?</td>
<td></td>
</tr>
<tr>
<td>2. Why?</td>
<td></td>
</tr>
<tr>
<td>c) Why do you want to fulfil your Personal Mission for yourself?</td>
<td>e) Why do you want to fulfil your Personal Vision and External Mission and bring benefit to society?</td>
</tr>
</tbody>
</table>

HANDOUT

Personal 4 Whys
### Mission and Vision statements

**Example**

<table>
<thead>
<tr>
<th><strong>Personal Vision</strong></th>
<th><strong>External Vision</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer the question what you as a professional want to fulfil.</td>
<td>Answer the question what your contributions will lead to for society.</td>
</tr>
<tr>
<td><em>To be widely acknowledged as a leading expert in Internet technology.</em></td>
<td><em>To contribute to effective and efficient communication solutions, leading to energy savings and having a positive impact on our environment.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Personal Mission</strong></th>
<th><strong>External Mission</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer the question what you want to have your focus on and what motivates you professionally.</td>
<td>Answer the question what purpose you want your Personal Mission to have for your stakeholders/customers.</td>
</tr>
<tr>
<td><em>To design innovative web-based solutions.</em></td>
<td><em>To provide world-class web solutions enhancing the communication abilities for my customers.</em></td>
</tr>
<tr>
<td>Personal Vision</td>
<td>External Vision</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Personal Mission</td>
<td>External Mission</td>
</tr>
</tbody>
</table>
The purpose of this preparation exercise is to help participants reach a better understanding of their own most significant personal values. The exercise does not only help you understand yourself better, it also offers the team the opportunity to voice their beliefs and values which is a critical part of building a stronger social capital and connection within a team.

When it comes to personal commitment and motivation, understanding your own personal values is more important than understanding your company core values. So it is recommended that you start with this exercise before you take the journey to identify and define your wanted team core values.

**PURPOSE**
To help participants reach a better understanding of their most significant personal values and to create a forum where a team can share these values in an atmosphere of understanding and acceptance. It serves as a foundation for alignment exercises.

**OBJECTIVE**
Identify your team's personal values and recognize what the team shares in common.

**TIME**
The estimated time for this exercise is approx. 1 – 2 hours.

**BEFORE THE SESSION**
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you intend to use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation at least two weeks before your meeting and include the ‘PREWORK’ material. Communicate purpose and objective, when, where, and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuecentre.com/getconnected.
6. Make sure the meeting room is ready with all the material needed.
7. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.
DURING THE SESSION

1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.

2. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their personal values as one of the starting points in our values journey.

3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.

Steps to take (alt. 1):

- Bring up your prepared Personal Values & Hot Buttons.
- Everyone share their top 3 personal values and descriptions (approx. 10 - 15 min per person). If it is a large group divide into groups of 2 - 4 persons.
  NB: Emphasise that the dialogue and explanations are the main goals of the exercise, not merely stating what your values are.
- When everyone has shared their Personal Values, repeat the process with your Hot Buttons.
- When everyone is finished sharing, ask for reflections; How did it feel? What did you think? What have you learned? Are there any concerns or questions?

Steps to take if the team members have known each other for some time. (alt. 2)

- Follow a similar procedure to Alternative 1. above, but with the difference that everyone has to guess what their team members have written as their Personal Values, based on the behaviours they have observed when working with them.
- Depending on time available you could either guess or just share your Hot Buttons.

4. Explain the importance of understanding and being in contact with your own personal values and how this is linked to your company values.

5. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.

6. Conclude the exercise by a reflection followed by what you expect to be the next step on your culture build-up journey.

AFTER THE SESSION

1. How do you intend to reinforce your team’s reflections and conclusions (if any), and make your progress visible, that is, visual aids, questions, recognition, etc.?

2. Now that you have started to create a shared understanding of personal values and hot buttons, make sure your behaviour and priorities are aligned e.g. do we walk our talk?
Agenda
(proposal and facilitator notes)

1. Introduction 15 min
Go through Purpose, Objective and Agenda. Be open for questions.

2. Individual reflection of Prework 10 min
Ask the participants to bring up their Prework notes and take some minutes to reflect individually.

3. Small Group Dialogue 30 – 60 min
Form groups of 2 – 4 persons and ask the participants to share their personal values and descriptions. Point out that it is the dialogue itself that is most important. (Use alt. 1 or alt. 2)

4. Whole Group Reflection 15 min
Have the group reflect on what was the major thing they learned and took away from this exercise?
Reflection on Personal Values

It is very important that you create a foundation for your own personal values. The following exercises will help you focus on this.

I. A LIFE VALUES EXERCISE

Other people have a great influence on our lives. John Donne said, “No man is an island.” Martin Luther King spoke of the “web of mutuality.”

Identify three people who have had the deepest impact on your life (at least one outside your family). What specific advice, philosophy, or value has stayed with you?

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List three books, tapes, movies, poems, or sayings that have contributed to your own values. What insight has stayed with you?

<table>
<thead>
<tr>
<th>Resource</th>
<th>Insight</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tennyson in Ulysses says, “I am part of all I have met.” List three peak experiences that have profoundly shaped your life and/or career direction.

<table>
<thead>
<tr>
<th>Experience</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NB! This part of the PREWORK is personal, and will not be shared with someone else, unless you want to.
II. PERSONAL VALUES SELECTION

The purpose of this preparation exercise is to help you reach a better understanding of your own most significant personal values. It is beneficial to do this exercise every one or two years.

What values do I truly and passionately hold?

Values are deeply held views of what we find worthwhile. They come from many sources: parents, religion, schools, peers, people we admire, and culture. Many go back to childhood. There are others we learn as adults. As with all mental models, there's a distinction between our "espoused" values, which we profess to believe in, and our "values in action" which actually guide our behaviours. These latter values are coded into our brains at such a fundamental level that we can't easily see them. We rarely bring them to the surface or question them. That's why they can create dissonance for us.

Step 1. From the enclosed list of personal values, select the ten that are most important to you - as guides for how to behave, or as components of a valued way of life. Feel free to add any values of your own to this list.

Step 2. Now that you have identified ten, imagine that you are only permitted to have five values. Which five would you give up? Cross them off. Now imagine that you are only permitted four. Which would you give up? Cross it off. Now cross off another, to bring your list down to three. Then, do it again to bring your list down to two. Finally, cross out one of your two values. Which is the one item on this list that you care most about?

Step 3. Now that you have identified your three values, complete the exercise on page 87.
## List of Values

- accountability
- achievement
- adaptability
- balance
- being liked
- being the best
- caring
- caution
- challenge
- clarity
- commitment
- community involvement
- compassion
- conflict resolution
- continuous learning
- control
- cooperation
- courage
- creativity
- dialogue
- diversity
- ease with uncertainty
- efficiency
- enthusiasm
- environmental awareness
- ethics
- excellence
- experience
- fairness
- family
- financial stability
- forgiveness
- friendship
- future generations
- generosity
- health
- honesty
- humility
- humor/fun
- image
- independence
- initiative
- innovation
- integrity
- interdependence
- job security
- listening
- logic
- making a difference
- mentoring
- mission focus
- open communication
- openness
- optimism
- patience
- performance
- perseverance
- personal fulfillment
- personal growth
- philanthropy
- power
- pride
- professional growth
- quality
- reliability
- respect
- responsibility
- reward
- risk-averse
- risk-taking
- safety
- self-discipline
- spirit
- success
- trust
- vision
- wealth
- wisdom
- work/life balance

If you cannot find your preferred values above, please list your own below:

- 
- 
- 
- 
- 
- 
- 
- 
- 
- 

Source: Barrett Values Centre
III. Personal Values Statement

Based on the two previous exercises, list your top three values and describe what each value means to you.

<table>
<thead>
<tr>
<th>Value</th>
<th>Personal Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>
IV. Hot Buttons

Next, define your “hot buttons.” A hot button has a deep root in one of your personal values. It is a behaviour or a situation that can make you feel very strongly because it crosses or goes against one of your personal values. For example, if one of my core values is honesty, then a hot button for me might be that I can feel deeply affronted if I discover that people are acting on hidden agendas. If one of my personal values is respect, my hot button might be when I see unfair public criticism by a manager of one of their employees. Even though we might share the value, we might still have different hot buttons. They are unique to each of us.

Describe at least one hot button for each of your personal values.

<table>
<thead>
<tr>
<th>Value</th>
<th>Hot Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
</tbody>
</table>
DIALOGUE TOOLS  From PVA to Action

FROM PVA TO ACTION
Session Leader Guide

A good start on your personal journey to get better connected to your personal values. There are many ways in which you can do this, Barrett Values Centre offer you two possibilities. One is to do an Individual Values Assessment (IVA), or a Personal Values Assessment (PVA). The difference between a IVA and a PVA is that a IVA provides a picture of your perception of the values at play at your workplace and the alignment or gap in between, while the PVA focus only on your personal values list. It is vitally important to know your values so that you can consciously use them in your decision making.

This tool is based on the self-assessment PVA. You find the on-line assessment at www.valuescentre.com/pva and it is a free of charge report. The report you receive analyses your top ten personal values to determine, a) the levels of consciousness you operate from, and b) the types of values that are important to you (individual, relationship, societal). It provides you with a framework to relate to your own values and determine your strengths and improvement areas, as well as your next step of evolution.

The exercise is based on one of the tools in The New Leadership Paradigm Workbook: Leading Self. You can learn more about this at www.newleadershipparadigm.com

It also works well to use an IVA as a base for this exercise, but then you need to work together with a certified CTT consultant. Go to www.valuescentre.com/partners to find a consultant near you. This exercise could be done individually as well as together with your team. The benefit of doing the exercise with your team members is that it provides an opportunity for you to get to know each other better on a deeper and more profound level. Which is fundamental when growing respect and trust between each other. It also offers you a possibility to get feedback and affirmation on your personal values and if you walk your own talk or not.

If you decide to do the exercise with your team, then we recommend that you ask your participants to do the PVA and personal reflections before the group meeting. Ask participants to bring their results with them.

PURPOSE
To find out more about yourself. What is important to you and what motivates you.

OBJECTIVE
To deepen your understanding of the values that are important to you and the levels of consciousness you operate from.

TIME
The estimated time for this exercise is approx. 1 – 2 hours.
BEFORE THE SESSION
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you should prepare yourself or use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation, communicate purpose and objective, when, where and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected.
6. Make sure the meeting room is ready with all the material needed.
7. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

DURING THE SESSION
1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their view.
3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
4. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
5. Conclude the exercise with a shared reflection of the experience and learnings.

AFTER THE SESSION
Make sure to recognize and see each other’s strengths and behaviour as confirmation and acknowledgement of what you have shared with each other during your meeting.

There should only be individual actions after this exercise, no team actions, except the action defined above.
### Individual Exercise
(Could also be used as instruction to be sent out via mail before a team meeting)

1. **Get prepared**  
   10 min  
   Bring paper and pen to make notes, if needed. Find a place where you can be undisturbed and by yourself for about 30-60 minutes. Connect to the PVA website at www.valuescentre.com/pva. Relax and get centred to be here and now. If you want, you could do the “Creative Mind – Meditation”, which you find at page 190.

2. **Do Personal Values Assessment**  
   5 – 10 min  
   Select the values that most represent who you are, not who you would like to be. If you don't find your exact value word in the list, please select the one that best describes your personal value. Write your own value in your own notes, too. Complete the online survey, and get your report (pdf) via mail. Print your report and read it. Make notes of what becomes clear about you, and highlight what best describe who you are.

3. **Analyse and reflect**  
   30 – 45 min  
   Use the two worksheets in the PVA to reflect upon your most important values and behaviours and values you want to live and/or explore more. Share page 92 or 197.

4. **Prepare (3-5 min) presentation**  
   15 min  
   If you are going to have a team meeting where you will share your personal values, please prepare yourself to talk about your most important values and behaviours. You only have to share what you feel like sharing. No one can force you to share what you don't feel like sharing. You may also share what you want to explore or do more of, your individual evolution.

### Agenda – Team sharing
(proposal and facilitator notes)

1. **Introduction**  
   20 – 30 min  
   Go through Purpose, Objective and Agenda. Be open for questions and concerns. Invite the participants to share how it was to do the individual exercise. Ask if there are any specific learnings, questions or concerns from the prework.

2. **Sharing and listening**  
   20 – 60 min  
   If you have a small team, ask everyone to stand in front of the group for a few minutes and describe their main results. If you have a larger group, split the group into threes and give them about 20 minutes to share and discuss their answers with each other.

3. **Whole Group Reflection**  
   15 – 30 min  
   Have the group reflect on what was the major thing they learned and took away from this exercise?
<table>
<thead>
<tr>
<th>Positive Focus / Excessive Focus</th>
<th>Service to Humanity and the Planet</th>
<th>Service</th>
<th>Making a Difference</th>
<th>Internal Cohesion</th>
<th>Transformation</th>
<th>Self-esteem</th>
<th>Relationship</th>
<th>Survival</th>
</tr>
</thead>
<tbody>
<tr>
<td>Devoting your life to selfless service to humanity and the planet.</td>
<td>Collaborating with Partners: Working with others to make a positive difference by actively implementing your purpose and vision.</td>
<td>Service</td>
<td>Making a Difference</td>
<td>Internal Cohesion</td>
<td>Transformation</td>
<td>Self-esteem</td>
<td>Relationship</td>
<td>Survival</td>
</tr>
<tr>
<td>Finding Personal Meaning: Uncovering your sense of purpose and creating a vision for the future you want to create.</td>
<td>PERSONAL GROWTH: Understanding your deepest motivations, experiencing responsible freedom by letting go of your fears.</td>
<td>Transformation</td>
<td>Self-esteem</td>
<td>Relationship</td>
<td>Survival</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-worth: Feeling a positive sense of pride in self and ability to manage your life.</td>
<td>Belonging: Feeling a personal sense of belonging, feeling loved by self and others.</td>
<td>Relationship</td>
<td>Survival</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Security &amp; Safety: Creating a safe secure environment for self and significant others.</td>
<td>Control, greed.</td>
<td>Survival</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FROM FEAR TO TRUST

Session Leader Guide

The purpose of this exercise is to help participants gain a greater understanding of fears that hold them back from courageous action and to create next steps to resolve a current problem situation. It can be used as a stand-alone exercise or used as a module in a longer workshop. All human beings experience fear. Fears have a very positive side, they help to keep us safe and enhance our chances of survival in dangerous situations. However, our fears can also hold us back from facing and exploring unresolved problems and relationship conflicts. Our fears are often sourced from negative childhood experiences or learned from the people (organisations and community) that we live within.

PURPOSE & OBJECTIVE

- To attain new understanding about difficult problems or relationship issues that are holding you back.
- To create the next steps necessary to find a resolution
- To explore the values, beliefs and behaviours (consciousness) that drives or restrains your actions.

TIME

The estimated time for this exercise is approx. 1 – 2 hours.

BEFORE THE SESSION

1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. Make sure that the room makes it possible to split up the group into pairs and work in pairs in an acceptable way.
4. Send out the invitations for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
5. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
6. Try to come at least 20 minutes before everyone else.
7. Make sure that you have printed hand outs for all participants.
8. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.
DURING THE SESSION
1. Present the Purpose, Objective of the exercise. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
3. Explain the importance of understanding the fears that unconsciously drive our beliefs and actions.
4. Facing and understanding our fears can be a personal experience. Sensitively ensure that everyone gets the opportunity to reflect and voice his or her insights and learning from this exercise. Remember, the process is as important as the outcome.
5. Conclude the exercise by a reflection followed by what you expect to be the next step on your culture build-up journey.

AFTER THE SESSION
1. Make sure to recognize and see each other’s strengths and behaviour as confirmation and acknowledgement of what you have shared with each other during your meeting.
2. There should only be individual actions after this exercise, no team actions, except the action defined above.
### Agenda
**(proposal and facilitator notes)**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Introduction</strong></td>
<td>10 min</td>
</tr>
<tr>
<td>Go through Purpose, Objective and Agenda. Be open for questions.</td>
<td></td>
</tr>
<tr>
<td><strong>2. Individual work and reflection</strong></td>
<td>10 – 15 min</td>
</tr>
<tr>
<td>Ask the participants to complete the handout and work through the steps in the exercise individually. This is personal reflection time.</td>
<td></td>
</tr>
<tr>
<td><strong>3. Small Group Dialogue</strong></td>
<td>30 – 40 min</td>
</tr>
<tr>
<td>Form pairs and ask the participants to share their stories and insights.</td>
<td></td>
</tr>
<tr>
<td><strong>4. Whole Group Reflection</strong></td>
<td>20 min</td>
</tr>
<tr>
<td>Have the group reflect on what was the major thing they learned and took away from this exercise?</td>
<td></td>
</tr>
</tbody>
</table>
1. Choose a real work situation / relationship that you would like to improve but so far you have been unable to resolve.
   Situation: ..................................................................

2. Use the Want-Have Consciousness Matrix below to describe the situation in four sentences.

3. Fill the boxes in the consciousness matrix, answering each with a short statement (not a narrative).

<table>
<thead>
<tr>
<th>1. In this situation, what I want that I have......</th>
<th>2. In this situation, what I don’t want that I have......</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. In this situation, what I want that I don’t have......</td>
<td>4. In this situation What I don’t want that I don’t have......</td>
</tr>
</tbody>
</table>

4. With regard to the situation you have chosen, this matrix is the structure of your consciousness. It exposes the thoughts and beliefs that inform your action or inaction.

5. To understand how this structure works, imagine that each cell is an internal Counsellor and the statement is his/her mandate.

6. Each counsellor has a ‘positive intention’ because they know what is good for you and has been a good partner to satisfy your needs.

7. It is important to understand what each Counsellor brings to you in this consciousness matrix.

8. In order to do so, create an imaginary conversation between the Counsellors behind each cell, as follows:
   - Notice what happens inside you when Cells 2 and 3 talk to each other...usually it is like an invitation to go forward...because these are your “Driving Counsellors”.
   - Notice what happens inside you when Cells 1 and 4 talk to each other...It is usually as an invitation to not move...because these are your “Restraining Counsellors”.
   - Notice what happens inside you when the other Cells talk to each other...usually “internal conflict” arises...Cells 1 and 4 will fight to keep the status quo...because they are two very conservative Counsellors (they used to manipulate you with fear).
   - Avoid judging their responses and recognise the “positive intentions” of the four Counsellors that want to benefit you from their different perspectives.
   - Listen to their replies and connect with your feelings towards the working situation or the relationship you are dealing with.

9. What insights and understanding do you gain from this exercise?

10. What are the next steps you can take to address the unresolved situation and when will you act?
MANAGE YOUR ENERGY

Session Leader Guide

Our performance and actions depend on the individual level of energy in each of the members of a team or organisation. The more competitive the environment the greater demand it puts on us to deliver more in less time with fewer resources. This puts us under a lot of strain. In order to cope with these new demands in a productive and healthy way, we need to connect to our current level of energy and understand how and where we need to go to re-fuel.

Human beings need time to relax and recharge their energy, but are we aware of what it consists of and indeed, where we get our energy from? This tool has the ambition to help you to find your answer on these questions.

Our energy sources are strongly connected to our basic human needs. Physical, emotional, mental and spiritual needs. By assessing our perception of our current state regarding these needs we also get a good picture of what gives us energy and what changes we need to make to have a balanced energy management.

This tool is based on a Harvard Business Review article published in October 2007 by Tony Schwartz and Catherine McCarthy. It elegantly presents the challenges and possibilities with energy management in a short, simple, yet very useful way.

To find out more, please go to www.theenergyproject.com

PURPOSE
To create better understanding of, and identify our current individual level of energy and encourage us to work on it.

OBJECTIVE
Identify the areas I need to work on in order to improve my energy at work.

Have a picture of what you as a leader, and we as an organisation could do to better manage the energy in our teams.

TIME
The estimated time for this exercise is approx. 1 – 2 hours.
DIALOGUE TOOLS
Manage Your Energy

BEFORE THE SESSION
1. Anchor the decision to do this workshop in your team.
2. Define who, when and where and book a meeting room.
3. Send out an invitation at least two weeks before your meeting with purpose and objective and all practical details. Optional: Have the participants listen to Tony Schwartz talking about energy on the internet (www.theenergyproject.com).
4. Select the slides you intend to use. You need only your laptop, a pc-projector and the assessment template “Are you Headed for an Energy Crisis?” as handouts.
5. Make sure the meeting room is set up and ready with all needed materials. No special seating is needed. However, sitting in a circle without any table in front of you is recommended for better communication and connection.
6. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

DURING THE SESSION
1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay during the whole meeting, and/or if they need to have a break for e-mail or phone calls etc.
2. Introduce the exercise by reading out the steps to be taken.
3. Make sure everyone understands the exercise. Walk through the agenda (see proposal and facilitation notes at the end of this tool). Allow time for questions and concerns. Underline and agree upon confidentiality, ie “what will be said in this room stays in this room”.
4. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is more important than the outcome in this exercise.
5. End the exercise by reading out your final conclusions. Clarify agreed actions by addressing who, when and how. Communicate intended next steps.

AFTER THE SESSION
1. Write and send out minutes (if any) as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).
2. Make sure the planned actions and wanted behaviours will be followed up according to your shared plan.
3. How do you intend to reinforce your team’s conclusions, and make your progress visible? Whatever you decide, make sure it happens.
**Agenda**  
(proposal and facilitator notes)

1. **Introduction**  
15 min  
Go through Purpose, Objective and Agenda. Reflect together about how you relate to human energy, what it is and why it is important to pay attention to it.

2. **Individual scoring of Energy**  
10 min  
Hand out the two-sided assessment “Are You Headed for an Energy Crisis?”  
Ask everyone to complete the assessment without sharing their scores with anyone else, unless you personally feel like sharing your results.

3. **Reflect and connect to our Energy**  
30 – 60 min  
NB! This step is only to be done if everyone feels comfortable in sharing their needs for energy in the team. If so, ask everyone to review their results and bring up what they feel is needed to be addressed in order to take better care of and create more energy in this team. Give everyone enough space and time to express their views and needs. Focus on listening, do not justify, correct or neglect the needs expressed. Look for themes in the dialogue, and check your assumptions. Note the shared themes on the flipchart or white board.

4. **Next step and follow up**  
15 min  
Encourage everyone to identify their own individual actions to improve their energy. Review the common themes and agree upon what actions you need to work on as a group. Discuss and agree on how you will reinforce, recognise and follow up. Set a date for review and follow up meetings.

5. **Reflection**  
15 min  
Have the group reflect on the following questions:

a. What was the major thing you learned and took away from this meeting?

b. What are the success factors to make our agreed actions happen?
Are You Headed for an Energy Crisis?
Please check the statements below that are true for YOU.

BODY
- I don't regularly get at least seven to eight hours of sleep, and I often wake up feeling tired.
- I frequently skip breakfast, or I settle for something that isn't nutritious.
- I don't work out enough (meaning cardiovascular training at least three times a week and strength training at least once a week).
- I don't take regular breaks during the day to truly renew and recharge or I often eat lunch at my desk, if I eat it at all.

EMOTIONS
- I frequently find myself feeling irritable, impatient, or anxious at work, especially when work is demanding.
- I don't have enough time with my family and loved ones, and when I'm with them my thoughts are often on other things.
- I have too little time for the activities that I most deeply enjoy.
- I don't stop frequently enough to express my appreciation to others or to savour my accomplishments and blessings.

MIND
- I have difficulty focusing on one thing at a time, and I am easily distracted during the day, especially by e-mail.
- I spend much of my day reacting to immediate crises and demands rather than focusing on activities with longer-term value and high leverage.
- I don't take enough time for reflection, strategizing, and creative thinking.
- I work in the evenings or on weekends, and I almost never take an e-mail–free vacation.

SPIRIT
- I don't spend enough time at work doing what I do best and enjoy most.
- There are significant gaps between what I say is most important to me in my life and how I actually allocate my time and energy.
- My decisions at work are more often influenced by external demands than by a strong, clear sense of my own purpose.
- I don't invest enough time and energy in making a positive difference to others or to the world.

By Tony Schwartz and Catherine McCarthy
Self Scoring

HOW IS YOUR OVERALL ENERGY?
Total number of statements checked: __

GUIDE TO SCORES
0–3: Excellent energy management skills
4–6: Reasonable energy management skills
7–10: Significant energy management deficits
11–16: A full-fledged energy management crisis

WHAT DO YOU NEED TO WORK ON?
Number of checks in each category:
Body __
Emotions __
Mind __
Spirit __

GUIDE TO CATEGORY SCORES
0: Excellent energy management skills
1: Strong energy management skills
2: Significant deficits
3: Poor energy management skills
4: A full-fledged energy crisis

MY REFLECTIONS AND ACTIONS:


By Tony Schwartz and Catherine McCarthy
Tony Schwartz and Catherine McCarthy recommend the following practices for renewing our four dimensions of personal energy:

**PHYSICAL ENERGY**
- Enhance your sleep by setting an earlier bedtime and reducing alcohol use.
- Reduce stress by engaging in cardiovascular activity at least three times a week and strength training at least once.
- Eat small meals and light snacks every three hours.
- Learn to notice signs of imminent energy flagging, including restlessness, yawning, hunger, and difficulty concentrating.
- Take brief but regular breaks, away from your desk, at 90- to 120-minute intervals throughout the day.

**EMOTIONAL ENERGY**
- Defuse negative emotions—irritability, impatience, anxiety, insecurity—through deep abdominal breathing.
- Fuel positive emotions in yourself and others by regularly expressing appreciation to others in detailed, specific terms through notes, e-mails, calls, or conversations.
- Look at upsetting situations through new lenses. Adopt a “reverse lens” to ask, “What would the other person in this conflict say, and how might he be right?” Use a “long lens” to ask, “How will I likely view this situation in six months?” Employ a “wide lens” to ask, “How can I grow and learn from this situation?”

**MENTAL ENERGY**
- Reduce interruptions by performing high concentration tasks away from phones and e-mail.
- Respond to voice mails and e-mails at designated times during the day.
- Every night, identify the most important challenge for the next day. Then make it your first priority when you arrive at work in the morning.

**SPIRITUAL ENERGY**
- Identify your “sweet spot” activities—those that give you feelings of effectiveness, effortless absorption, and fulfilment. Find ways to do more of these. One executive who hated doing sales reports delegated them to someone who loved that activity.
- Allocate time and energy to what you consider most important. For example, spend the last 20 minutes of your evening commute relaxing, so you can connect with your family once you’re home.
- Live your core values. For instance, if consideration is important to you but you’re perpetually late for meetings, practice intentionally showing up five minutes early for meetings.

**HOW COMPANIES CAN HELP**
To support energy renewal rituals in your firm:
- Build “renewal rooms” where people can go to relax and refuel.
- Subsidize gym memberships.
- Encourage managers to gather employees for midday workouts.
- Suggest that people stop checking e-mails during meetings.
This exercise helps individuals in a group to create their team vision and mission and to clarify the connection to an external vision and mission for example to that of their customers and society. The exercise is based on Richard Barrett’s book “Liberating the Corporate Soul”.

**PURPOSE**
Through dialogue create mission and vision statements for the team.
To clarify the relationship between the team vision and mission and an external vision and mission.

**OBJECTIVE**
A shared understanding of the alignment between what is the purpose of the team and its contribution for a greater purpose e.g. for its customers and society.

**TIME**
The estimated time for this exercise is approx. 1 – 2 hours.

**BEFORE THE SESSION**
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. Make sure that the room makes it possible to split up the group in pairs and work in pairs in an acceptable way.
4. Send out the invitation for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved. If the group has done the Personal 4 Whys exercise, ask them to bring the results to this exercise.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find suggested slides at www.valuescentre.com/getconnected.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
7. Try to come at least 20 minutes before everyone else.
8. Make sure that you have printed handouts for all participants.
9. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

**DURING THE SESSION**
1. Hand out the 4 Whys template showing the four quadrants of the model and explain what each quadrant represents.
2. Divide into smaller groups, 3 – 5 persons in each group.
3. Present the questions:
   a) What is the purpose of our team?
   b) What do we need to do in order to grow and develop as a team?
Give the groups the task to have a creative dialogue/brainstorming session, which should result in 1 - 2 statements that answer the questions and serve as a proposal for an Internal Mission.
4. List all proposed statements on a whiteboard or flip chart. Lead the whole team in a dialogue to select and agree upon which statements they feel most confident with as the Internal Mission. Get all participants to fill in the agreed Internal Mission in their forms.

5. Continue in the small groups to propose an Internal Vision by finding statements answering the question c) Why do we want to fulfil our Internal Mission as a team and for our team members?

6. Repeat the procedure in 4. above to reach agreement on an Internal Vision. Let all participants fill in the agreed Internal Vision in their forms.

7. Continue in the small groups to propose an External Mission by finding statements answering the question d) Why do we want to fulfil our Internal Mission for our “customers”?

8. Again, repeat the procedure in 4. to agree on an External Mission. Let all participants fill in the agreed External Mission in their forms.

9. Continue in the small groups to propose an External Vision by finding statements answering the question e) Why do we want to fulfil our External Mission and Internal Vision and bring benefit to society?

10. Again, repeat the procedure to agree on an External Vision. Let all participants fill in the agreed External Vision in their forms.

11. Once the form is complete, verify what they have defined by going through the statements in the opposite order, External Vision --> External Mission --> Internal Vision --> Internal Mission, but by changing the ‘Why’ in the questions with ‘How’. E.g. the answer to the question ‘How do you want to fulfil your External Vision and bring benefit to society?’ should be answered by the External Mission and Internal Vision statements.

12. Gather the team for a group reflection. Ask for comments on the process – what they felt, what they got out of the exercise and how they can individually connect to the result (see reflection questions in Team Learning).

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).

2. How do you intend to follow up the session? A good idea is to plan a follow up discussion 1 or 2 months after the session, and then at least one follow up annually with the team.

3. Consider which next exercises you want to conduct. For example the exercise “Team Core Values & Wanted Behaviours” would be an appropriate exercise now that the group has established their Vision and Mission statements.
## Agenda
(proposal and facilitator notes)

1. **Introduction** 15 min
   - Go through Purpose, Objective and Agenda. Be open to questions.

2. **Individual reflection** 10 min
   - If the participants have done the Personal 4 Whys exercise, ask them to review the result and take some minutes for individual reflection.

3. **Completion of the Team 4 Whys template** 30 – 60 min
   - Divide into smaller groups of 3 – 5 people. Hand out the Team 4 Whys template and ask the groups to start to complete the form according to the instructions and example. For each area i.e. for Internal Mission, Internal Vision, External Mission and External Vision, gather the big group together to share their different outcomes. Have the big group agree on one common statement for each area.

4. **Group Dialogue** 15 min
   - Conclude by reading out the agreed Vision and Mission statements and ask for comments.

5. **Reflection** 15 min
   - Have the group reflect on the following questions:

   - **What was the major thing you learned and took away from this exercise?**

   - **What are the success factors to make our agreed statement happen?**
### Mission and Vision statements

**Team 4 Whys – Exercise**

<table>
<thead>
<tr>
<th>Internal Vision</th>
<th>External Vision</th>
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<tbody>
<tr>
<td><strong>c) Why do we want to fulfill our Internal Mission as a team and for our team members?</strong></td>
<td><strong>e) Why do we want to fulfill our External Mission and Internal Vision and bring benefit to society?</strong></td>
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<table>
<thead>
<tr>
<th><strong>1. WHY?</strong></th>
<th><strong>3. WHY?</strong></th>
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<tbody>
<tr>
<td><strong>Internal Mission</strong></td>
<td><strong>External Mission</strong></td>
</tr>
<tr>
<td>a) What is the purpose of our team?</td>
<td>d) Why do we want to fulfill our Internal Mission for our “customers”?</td>
</tr>
<tr>
<td>b) What do we need to do in order to grow and develop as a team?</td>
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### Mission and Vision statements

**Example**

<table>
<thead>
<tr>
<th>Internal Vision</th>
<th>External Vision</th>
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</thead>
<tbody>
<tr>
<td>Answer the question on what the team wants to accomplish.</td>
<td>Answer the question on what contributions the team wants to make to society.</td>
</tr>
<tr>
<td><em>To be a world leader in Internet technology.</em></td>
<td><em>To build opportunities for global economic prosperity.</em></td>
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<table>
<thead>
<tr>
<th>Internal Mission</th>
<th>External Mission</th>
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</thead>
<tbody>
<tr>
<td>Answers the question on what the team wants to have as its focus, and what motivates the team members.</td>
<td>Answer the question on what services the team wants to give to its “customers”.</td>
</tr>
<tr>
<td><em>To create and sell innovative web-based solutions.</em></td>
<td><em>To provide world-class web solutions adding substantial value for our customers.</em></td>
</tr>
</tbody>
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### Mission and Vision statements

**Template**

<table>
<thead>
<tr>
<th>Internal Vision</th>
<th>External Vision</th>
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<table>
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<th>Internal Mission</th>
<th>External Mission</th>
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ALIGN STRATEGY & CULTURE

Session Leader Guide

There is a well known expression that “Culture eats Strategy, for breakfast”. In reality this is very true, because even if you have the worked through and smartest strategy for your organization, it still will be very useless unless the culture in your team supports your strategy. If the people who are to execute and fulfill the strategy do not think and feel that they work in a healthy and trusting environment, then they will not have their focus on reaching your strategic objectives.

Strategy exists in the objective collective visible reality, often materialized in some form of strategy document with goals and targets. Culture on the other hand exists beneath the surface within each individual in their minds and emotions, which is invisible and quite often even subconscious. A culture starts by each individual becoming conscious of their own values and the collective values of your team and then this becomes visible in people's behaviors and performance.

However, culture needs strategy to survive! In order for a culture to live and prosper, the culture needs a shared ambition, purpose and direction. This is what a good strategy provides. So even if the culture could jeopardize your strategic ambitions, it still needs the strategy to survive. So the key is that you realize that you need both strategy and culture to free the full human potential!

The process to align your strategy with your culture is not as complicated as it may sound. Simply put, it is a conscious act of asking yourself what culture you need in order to reach your strategic objective. This tool provides you with these steps.

**PURPOSE**
To help you connect your strategy with a wanted culture that supports your strategic objectives.

**OBJECTIVE**
At the end of this session you should have realized your key challenges and identify behaviour and actions needed connected to each strategic objective.

**TIME**
The estimated time for this exercise is 1-2 hours.
BEFORE THE SESSION

1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room. Ideally it should be the leaders, but if a smaller team it could involve the whole team.
3. Decide whether you should prepare yourself or use a guest speaker to introduce the workshop and/or create the right atmosphere. Like your top leader, a customer, external speaker, etc.
4. Send out an invitation, communicate purpose and objective, when, where and who. Ask all participants to prepare themselves by defining what they regard as the prioritized strategic objectives the coming 12-18 months. Ask them to list them in short bullet points and in priority order. Ask them to print and bring their list to the meeting.
5. Select the slides you intend to use. What documents does your organization have to communicate your strategy? Slides, Word documents, printed leaflets, etc. Bring them! Look for ideas and select other supporting slides at www.valuescentre.com/getconnected.
6. Print the handouts, one for each participant.
7. Make sure the meeting room is ready with all the material needed.
8. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
9. Try to come at least 20 minutes before everyone else.
10. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

BEFORE THE SESSION

1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the manager to introduce the workshop by expressing his/her personal view on how important this work is. And underline the importance for each participant to clearly share and articulate their view in an honest and open way, based on trust.
3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
4. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
5. Ask everyone to talk two by two about their expectations of this workshop. Then ask the team to share what they have talked about. Ideally, capture their expectation on a flipchart or white board so that everyone can see it. This is both to make everyone more connected to this work here and now AND for you as a session leader to hear and connect to their expectations.
6. Ask everyone to bring up their pre-work answer about the prioritized strategic objectives. Hand out the first handout and ask them to individually write down their answer to these two questions. When they are ready, ask them to talk about their answer in small groups of 3-5 persons.
7. Display the answers to the first question on a flipchart. Conclude if the displayed prioritized strategic objectives for the whole team are aligned and shared.
8. Share the challenges that have been identified in order to reach our strategic objectives. Try to define if these challenges are “hard/objective/tangible” challenges (above the surface) or “soft/subjective/intangible” challenges (below the surface). If possible display them on a white board, above or below a horizontal line like a waterline. The most common answer is that the most of the challenges identified are below the surface. See example below.

9. Look at the identified challenges and reflect upon “what does this tell us about our team and what we need to focus on to reach our strategic objectives?”.

10. Hand out the second handout. Ask everyone to individually answer the two questions. When ready, share the answers in small groups of 3-5 persons. Ask them to reflect upon: When looking at the answers to question 1, what becomes clear to you? How do the identified values and behaviours align with the culture we have today? What are the major gaps? What proposed tools and actions have been identified? Ask them to prioritize 2-4 actions. What is needed to make this happen, and by when?

11. Collect and list all prioritized actions. Assign persons and resources, and set time.

12. Conclude the exercise with a shared reflection of the experience and learnings.

AFTER THE SESSION

1. Make sure actions are understood to meet the expectations of the commitments done at the meeting.

2. Include the follow up of the agreed actions into existing follow up meetings.
**Agenda**
(proposal and facilitator notes)

1. **Introduction**  
   Go through Purpose, Objective and Agenda. Be open for questions and concerns.  
   
2. **Our prioritized Strategic Objective and Challenges**  
   Everyone present their prioritized strategic objectives.  
   
3. **Culture Values & Behaviours needed**  
   Ask everyone to identify the values and behaviours, plus the tools and actions needed.  
   
4. **Whole Group Reflection**  
   Have the group reflect on what was the major thing they learned and took away from this exercise.
### Questions for reflection:

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<th>Your prioritized strategic objectives:</th>
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<table>
<thead>
<tr>
<th>What are your biggest challenges to succeed in reaching your strategic objectives?</th>
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Questions for reflection:
Based on your shared strategic objectives (for your organization as a whole, plus for your team in particular)…

1. What values and behaviours do you need to live by in order to reach your strategic objectives?

2. What tools and actions do you need to grow these values and behaviour?
INTERNALISATION
OF TEAM AMBITIONS

Session Leader Guide

Teams often have both direct and indirect consequences impacting a multitude of stakeholders. Awareness of the team’s objectives and compatibility with the ambitions of the members and stakeholders is necessary to create a shared view and improve the level of consciousness from the key people needed to make the team successful.

This exercise sets out to raise a dialogue around the compatibility of team objectives with the ambitions of the key people needed to make the team successful.

You can do this on an individual level and/or a team level and the output from many of the other exercises within Get Connected can be used as input.

I.e. See the illustration below which shows the tools and exercises that can be used as input.

Optional Exercises
• Core Motivation
• Personal 4 Whys
• Personal Values
• PVA or IVA

Optional Exercises
• Connect to the Customer
• Stakeholder Analysis

Other Tools & Methods
• SWOT
• Objectives Modelling

Optional Exercises
• Team 4 Whys
• Team Core Values
• CVA
DIALOGUE TOOLS

INTERNALISATION OF TEAM AMBITIONS

PURPOSE
To create a dialogue and bring to the surface, reflect upon and connect to the thoughts and feelings about our defined team objectives and deliverables.

OBJECTIVE
At the end of the exercise everyone should have a shared meaning and commitment to our team and deliverables.

TIME
Estimated time for this exercise is approx. 2 – 3 hours.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercise yourself first so you know the key steps.
3. Optional: Run some or all of the optional exercises, tools and methods listed in the above illustration in advance so that their output can be used as input to this exercise. E.g.: Use Objectives modelling to break down the Team Objectives into more manageable or meaningful parts. Use Stakeholder Analysis to understand and the various forces and agendas of Key stakeholders. Use the 4 Whys exercises to help bring to light the driving forces behind the team’s motivation, etc.
4. Book a meeting room that makes it possible to work two by two in an acceptable way. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find suggested slides at www.valuescentre.com/getconnected.
5. Send out the invitation for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
7. Try to come at least 20 minutes before everyone else.
8. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION
1. Follow the proposed agenda.
2. Present the model illustrated above showing My Ambitions, Project Objectives and Our Ambitions. Include the details relevant for your project and team, i.e. What are your project objectives? What personal or group ambitions have been identified so far? (Input from the optional exercises, tools and methods can be used for this).
3. Present the reflection questions and distribute the hand-out detailing them (included at the end of this exercise):
   • What becomes clear to me when I read/hear about our team objectives and deliverables?
   • How do I feel and think in relation to the team objectives and deliverables?
   • In light of the above, what will be needed in order to make this a successful team for all stakeholders and team members?
   • Do we understand and connect to the team objectives? If there are gaps, what are the Actions needed?
   • Where do we have a positive or negative energy focus? What actions are needed?
### DIALOGUE TOOLS

**Internalisation of Team Ambitions**

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<td>4.</td>
<td>Divide the group into pairs and let them share their reflections/conclusions/concerns with their partner.</td>
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<tr>
<td>5.</td>
<td>Gather the group again for a whole group reflection.</td>
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<tr>
<td>6.</td>
<td>Have a team reflection on the alignment of their personal ambitions with the ambitions of the team, and what actions may be needed. Write down the team reflections and actions on a whiteboard/flip chart so that everyone can see and build on each other’s reflections.</td>
</tr>
<tr>
<td>7.</td>
<td>Let the team conclude what they find as critical for them in order to align their personal ambitions with the team ambitions. Try also to come to an agreement of how to follow up the agreed intentions e.g. by planning a follow up meeting.</td>
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### AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting is concluded. Enclose the slides you showed (if requested by any of the participants).
2. In certain cases follow-up meetings may be required to discuss compatibility of the team and personal ambitions. Examples:
   - In the case of a team member who becomes aware that his or her personal ambitions do not align with the team ambitions, a one-on-one discussion between that team member and their team leader may be needed to identify a workable solution. I.e. Can an adjustment be made to the person's role or responsibilities to better align ambitions?
   - One or more important stakeholders may realise there are clashes in ambitions. Are follow-up meetings required to re-clarify or redefine scope?
## Agenda (proposal and facilitator notes)

1. **Introduction**
   Go through Purpose, Objective and Agenda. Be open for questions.

2. **Reflection in small groups**
   Ask the participants to select a partner and share their reflections/ conclusions/ concerns with their partner.

3. **Group Dialogue**
   Make each small group share their reflections and conclusions in the big group. Let the group reflect over what has been presented and share their opinions of what actions they feel are needed to get aligned with the team ambitions.

4. **Reflection**
   Have the group reflect on what was their major learning and take-away from this exercise?
Questions for reflection:

1. What comes clear to me when I read/hear about our team objectives and deliverables?

2. How do I feel and think in relation to the team objectives and deliverables?

3. In light of the above, what will be needed in order to make this a successful team for all stakeholders and team members?

4. Do we understand and connect to the team objectives? If there are gaps what are the action needed?

5. Where do we have a positive or negative energy focus? What actions are needed?
The collective “wisdom of the crowd” is more powerful than each individual wisdom. By using the basic principles of Appreciative Inquiry, we collect the positive wisdom to free our full human potential and build a shared commitment of our collective ambitions of behaviors connected to our desired values. You can use any values you desire to clarify with this tool.

**PURPOSE**
To surface and define the teams desired values behavior through a co-creating positive dialogue.

**OBJECTIVE**
At the end of the session have a shared view of the behavior we expect and want for each of our core values.

**TIME**
The estimated time for this exercise is approx. 2 – 3 hours.

**BEFORE THE SESSION**
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you should prepare yourself or use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation, communicate purpose and objective, when, where, and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected.
6. Make sure the meeting room is ready with all the material needed.
7. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

**DURING THE SESSION**
1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their view.
3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
4. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
5. Conclude the exercise with a shared reflection of the experience and learnings.

**AFTER THE SESSION**
1. Make sure actions are taken to meet the expectations of the commitments done at the meeting.
# Agenda

**Agenda**

(proposal and facilitator notes)

<table>
<thead>
<tr>
<th>Step</th>
<th>Duration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Introduction</strong></td>
<td>10 min</td>
<td>Go through Purpose, Objective and Agenda. Be open for questions and concerns.</td>
</tr>
<tr>
<td>2. <strong>Select Value</strong></td>
<td>20 min</td>
<td>Select the value to focus your attention on. The exercise “Team Core Values and Behaviour” or “From CVA to Action” could be used to identify your values. You could also choose to work with one of your company espoused core values.</td>
</tr>
<tr>
<td>3. <strong>Story telling</strong></td>
<td>45 min</td>
<td>Divide your team into breakout groups; ask them to share their personal stories about a time when they felt that our team or another company where they have been working displayed a strong sense of the value you have chosen. Make your description as lively as possible. Think of questions like:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What was the situation?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What were you doing?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Who was with you?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What was happening?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• How did the ability of your organization to develop a strong customer centricity make you feel?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What was the most memorable aspect about this experience?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Give details.</td>
</tr>
<tr>
<td>4. <strong>Imagine</strong></td>
<td>30 min</td>
<td>Imagine a time 5 years from now when everyone working in this team is a living example of your chosen value, either internal or external. Describe what would be happening in the team or in your organisation. What would it feel like? What would it look like?</td>
</tr>
<tr>
<td>5. <strong>Define concrete behaviour/actions</strong></td>
<td>30 min</td>
<td>Within each breakout-group, what does the above teach you on:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What this value means for your work in your team and why it is important?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Define: how will you operate (differently) to role-model this yourselves in the current environment in terms of your behaviour?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Define some concrete goals/ steps/ actions, which you want to take in order to bring this value across more?</td>
</tr>
<tr>
<td>6. <strong>Share and agree follow up</strong></td>
<td>30 min</td>
<td>In plenary: Share with the other groups your outcomes from step 5 and have dialogue about it. Appoint a “value-coordinator” to hold each other accountable for this in the coming months up to an evaluation point.</td>
</tr>
<tr>
<td>7. <strong>Whole Group Reflection</strong></td>
<td>15 min</td>
<td>Have the group reflect on what was the major thing they learned and took away from this exercise?</td>
</tr>
</tbody>
</table>
## Appreciative Inquiry

<table>
<thead>
<tr>
<th>VALUE: SPECIFICS</th>
<th>BEHAVIORS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>
This exercise helps you as a leader to establish a set of shared values and related wanted behaviours. To have shared values in a team will:

- create better understanding and communication.
- help people to function and work better together and feel better about what they do.
- create better co-operation and alignment of people towards a common goal.
- create the glue that keeps the team together.
- help to focus attention on the right issues.
- state the "fingerprints" of the organisation.
- create greater value for all the stakeholders.

Source: "The Leadership Challenge" by Jim Kouzes and Barry Posner

Clarifying what are the wanted behaviours related to the shared values, is fundamental when creating an effective and attractive work environment. The outcome from this exercise together with a shared vision and mission form a strong foundation for the team culture. Note that this is a learning journey, which demands continuous and consistent follow-up reflections and improvements to ensure that the team and its members walk-the-talk.

**PURPOSE**
Through dialogue to identify shared values, beliefs and wanted behaviours needed for an attractive and competitive team culture.

**OBJECTIVE**
To agree upon a shared list of values, supported by clear definitions of wanted behaviours.

**TIME**
The estimated time for this exercise is approx. 2 – 3 hours.

**BEFORE THE SESSION**
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you should prepare yourself or use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation, communicate purpose and objective, when, where and who; include the list of values and ask each person to select three (3) values that they personally would see as guiding values for the team. Ask them to return their selected values one week before the exercise.
5. Collect the selected values from all participants and rank them in order of the number of "votes" each value received. i.e. the most selected value first, etc.
6. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected .
7. Make sure the meeting room is ready with all the material needed.
### DURING THE SESSION

1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their view.
3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
4. Divide into smaller groups, 3 – 5 persons in each group.
5. Hand out the list of ranked values to each group and ask them to select and agree upon 3 – 5 values from the list. Use the enclosed template to define the meaning of each selected value.
6. Gather all the groups and let each group present their selected values. List the values on a whiteboard or flip chart.
7. Lead the whole combined group in a dialogue to reflect on the proposed values, then select and agree upon 3 – 5 of these.
8. Give the small groups some minutes to reflect on what these values mean in terms of behaviour(s) and propose actions to grow their desired culture.
9. Lead the whole group in a dialogue to agree upon which wanted behaviours are related to the selected values, how to make them come alive and finally how to ensure that the team members live their values. Note everything down on the whiteboard/flip chart or directly in the template on a PC with a projector.
10. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
11. Conclude the exercise with a shared reflection of the experience and learnings.

### AFTER THE SESSION

1. Document the agreed values and behaviours and send it out as a draft to all participants. Ask the team members to reflect individually on whether they can commit to what was agreed at the exercise. Attach examples of how to visualize the selected Values and Wanted Behaviours.
2. Bring the result and comments to a short dialogue at the next team meeting to finally agree and create an Action Plan.
3. Make sure to come back to your core values and wanted behaviour in your daily meetings, by reading them and before you start and/or have a short reflection at the end of your meetings to conclude if you live by them or not. As a result of this reflection confirm the alignment or adjust.
# Culture Values

| □ accountability | □ empowerment | □ optimism | □ organizational growth |
| □ achievement | □ enthusiasm | □ organizational | □ partnerships |
| □ adaptability | □ equality | □ passion | □ patience |
| □ appreciation | □ ethics | □ personal growth | □ philanthropy |
| □ balance (physical/ | □ excellence | □ power | □ productivity |
| emotional/mental/spiritual) | □ experience | □ professional growth | □ professionalism |
| □ being the best | □ exploitation | □ profit | □ quality |
| □ caution | □ fairness | □ responsibility | □ recognition |
| □ celebration | □ financial stability | □ reliability | □ respect |
| □ challenge | □ forgiveness | □ results orientation | □ risk-taking |
| □ clarity | □ future generations | □ shared values | □ shared vision |
| □ commitment | □ global perspective | □ short-term focus | □ spirit |
| □ community involvement | □ goals orientation | □ strategic alliances | □ support |
| □ compassion | □ honesty | □ teamwork | □ transparency |
| □ competence | □ human rights | □ trust | □ vision |
| □ conflict resolution | □ humor/fun | □ wisdom | □ work/life balance |
| □ consensus | □ image | □ | |
| □ continuous improvement | □ information sharing | | |
| □ continuous learning | □ innovation | | |
| □ control | □ integrity | | |
| □ co-operation | □ interdependence | | |
| □ cost consciousness | □ internal competition | | |
| □ creativity | □ job security | | |
| □ customer collaboration | □ leadership | | |
| □ customer focus | □ development | | |
| □ customer satisfaction | □ listening | | |
| □ diversity | □ long-term perspective | | |
| □ ease with uncertainty | □ loyalty | | |
| □ efficiency | □ making a difference | | |
| □ employee fulfilment | □ mentoring | | |
| □ employee health | □ mission focus | | |
| □ employee recognition | □ open communication | | |
| □ openness | | | |

If you cannot find your preferred values above, please list your own below.

| □ | □ | □ |
| □ | □ | □ |
| □ | □ | □ |

Source: Barrett Values Centre
Agenda
(proposal and facilitator notes)

1. Introduction 15 min
Go through Purpose, Objective and Agenda. Be open to questions.

2. Selection of values in small groups 30 – 60 min
Divide into smaller groups of 3 – 5 persons, hand out the list of ranked values and ask them to select 3 values and then to define the meaning of each value. Ask them also to describe how it appears when it works at its best and which wanted behaviours they would like to see in the team.

3. Group Dialogue 30 – 60 min
Gather them back into the big group and ask them to share their results from the previous step. Ask for comments and note them down. Try to coach the group in a dialogue with the ambition to reach a consensus as to which values and desired behaviours they want to have in the team. Continue and ask the group how they should make these values and behaviours come alive.

4. Agree 15 min
Ask the team if they can commit to live by these values and wanted behaviours from now on in the team. Ask also if they will accept to get reinforcing feedback if they live by them and directive feedback if they don’t live by them? Agree when and how you and the team should follow up on your agreed values and wanted behaviours.

5. Reflection 15 min
Have the group reflect on what was the major thing they learned and took away from this exercise.
<table>
<thead>
<tr>
<th><strong>Value</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>How do WE define this value?</td>
</tr>
<tr>
<td><strong>Culture</strong></td>
<td>How does this value (behaviour) look like when at its best?</td>
</tr>
<tr>
<td><strong>Actions to Create</strong></td>
<td>What actions can we take to make this value grow?</td>
</tr>
<tr>
<td></td>
<td>ME personally, WE as a group and the COMPANY / Management?</td>
</tr>
</tbody>
</table>

**Handout:** Team Core Values & Wanted Behaviours
Example: Visualize your values and Wanted Behaviours

TEAMWORK
- We actively contribute and share responsibility for results.
- We respect the opinions of each other and others and listen attentively.
- We ask for input and feedback from team members.

TRUST
- We are open and candid.
- We treat others with dignity and fairness.
- We operate with integrity and support colleagues.

COMMITMENT
- We deliver excellence in all professional endeavours.
- We can be counted on to deliver even in difficult circumstances.
- We keep mission, vision and values front and centre in making decisions.

OPENNESS
- We are proactive in taking initiatives to share information with each other.
- We bring issues to the table and speak honestly and openly about position and feelings.
- We support and encourage each other to engage in frank, honest and open conversations.

CUSTOMER COOPERATION
- We offer that little extra that the customers want, but don’t actually think of.
- We have a positive attitude and tackle every job with enthusiasm.

EMPLOYEE RECOGNITION
- We recognize and appreciate good performance and desirable behaviours.
- We always strive to provide regular and positive feedback.

TIP
Describe the values in terms of behaviour with an example or story.
This exercise is based on Barrett Values Centre's CTT (Cultural Transformation Tools) assessment called CVA (Culture Values Assessment). In order for you to work with these tools you need to be a trained CTT Consultant, or work with someone who is CTT certified user. If you need to get in contact with a certified CTT consultant, go to www.valuescentre.com/partners.

Organisational and team culture transformation begins with personal transformation, so if possible it is recommended that you combine this exercise with the exercise “From PVA to Action” on page 89. We especially recommend that you start with yourself first, if you are the leader of the team that you would like to transform the culture with. This will not only provide you with a better understanding and consciousness about yourself but also about the CTT language and tool to be used.

As we have learned that organizational transformation must critically start with, and be modeled by, the leader, this workshop is designed to help you initiate this process within your team. If you want to get a better overview of the whole process, then read “To measure and grow your culture” on page 52-55.

There is no “one-way” to run this type of workshop, so we have provided an alternative way for each of the steps for you to choose from to best fit your group and way of working. The important thing to remember is that you work in an involving and co-creating way. Regard this as an opportunity for you to engage and listen to and act upon what your team find important and value to make you as a team perform better together. Remember, the journey is as important as the end result and that when you decide to run this exercise you also start (or maintain) the cultural transformation journey in your team.

**OBJECTIVE**

To share and discuss the outcomes of a values assessment within your team, and to deeper explore the meaning and getting an in depth understanding of the values that people choose in the assessment. Then to:

- a. Identify the key values and what they specifically mean
- b. Describe the behaviours that do or would demonstrate the values
- c. Celebrate what is right and examples of best practices that are already taking place
- d. Agree causes and corrective actions of potentially limiting values
- e. Distinguishing between quick win actions and a longer term direction of what the high performing culture should look and feel like.

**TIME**

The estimated time for this exercise is approx. 4-7 hours.
BEFORE THE SESSION

1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide. Connect with a trained CTT consultant and agree on agenda and set up (make sure to plan time for this).
3. Book a meeting room. Make sure that the room makes it possible to split up the group into groups of 3-5 persons in an acceptable way. Make sure the room has the following:
   - PC projector.
   - Flip chart(s).
   - Tape or other material to affix flip chart sheets to the wall.
   - Large post-it notes
   - Markers: different colours.
   - Optional: small sticky notes or coloured dots for voting.
4. Decide if you want to run this in combination with an PVA or IVA workshop (tool: From PVA to Action).
5. Send out the invitations for your group meeting at least four weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
   For the CVA:
   - Review the values list template to be used so it is well aligned with the language and words used in your type of business. If your team already has a list of values (espoused values) make sure these values are included in your values list.
   - Decide if the focus of the assessment is going to be on how the team performs, or- on how the team perceives that the organization performs, and model your assessment-questions accordingly.
   - Make sure that you send the team the link to the assessment on time (e.g. 3 weeks) before the workshop.
6. Prepare a presentation together with your trained CTT consultant and identify the key overall outcomes of the assessment. Make sure to include the 7-level model and how to read the tools in the presentation. (In case there’s much demographics you will need to decide which overviews are most relevant, e.g. a comparison of current culture outcomes between units, a graphic that compares entropy, etc. You may even include some industry trend numbers; those are available to trained CTT consultants).
7. It helps when the 7-level model is customized to the language and outcomes for this context, where for each of the levels that you present, contains the values that show up in the top 10 outcomes of the CVA. Thus presenting the logic behind the results interpretation early on in your conversation.
8. If needed, print the presentation and/or the CVA results as a handout.
9. Prepare your own answers to the questions that you will ask your audience. Have your own answers to those questions ready as well. We suggest to prepare: “What surprises you?”, “What becomes clear to you?”, “What stands out as being positive? and “What stands out as being challenging?”.
10. It is also good if you prepare the questions you would like to ask the group to further explore and understand the results.
11. Make sure you have practiced the presentation and feel comfortable with the material.
12. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
13. Try to come at least 20 minutes before everyone else.
14. Setup the room with blank flip chart sheets on the walls; well-spaced out so that people can easily read the charts once writing is on them.
15. Be prepared to show the slides.

16. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

17. Make sure you take notes during the meeting or arrange for someone to do so.

DURING THE SESSION

1. Present the Purpose, Objective of the exercise. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.

2. Introduce the exercise by sharing the steps to be taken (see “Step by Step Instructions” below). Make sure everyone understands the exercise. Allow time for questions and concerns.

3. Explain the importance of understanding the importance of honest and open dialogue, based on respect and trust. Underline that we do this to perform better together in order to reach our strategic objectives and operational results. Remember, the process is as important as the outcome.

4. Conclude the exercise by a reflection followed by what you expect to be the next step on your culture build-up journey.

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting with your agreed key actions and wanted behaviours. Enclose the slides you showed (if requested by any of the participants).

2. How do you intend to reinforce your team’s conclusions and make your progress visible? For instance, visual aids, questions, recognition, etc.

3. Now, that you have started to create a shared understanding of expected behaviour, make sure your own personal priorities and behaviour is also aligned, as a leader.

4. How do you intend to follow up the session? A good idea is to plan a team follow-up discussion and also an individual follow-up at your performance review meeting with the participants. See “Culture Report” on page 185, for ideas and tips for continuous follow up and learning.
Agenda/Step by step instructions

A) Presenting the assessment outcomes (2-3 hrs)

1. **Connect to your team objectives** and long term goals, and describe how this aligns with today’s culture assessment.  
   5–10 min

2. **Deliver the Seven Levels of Consciousness** presentation and how to read CVA results using a neutral CVA example and explain the indices. This gives the participants an opportunity to see what the plots can show, what the white dots and other unknown items mean.
   For an example presentation check at www.valuescentre.com/getconnected.
   20 min

3. **Put the team results on the screen** (and/or as handouts). Let the results speak for themselves. Be prepared to answer questions about the model and tool structure. Avoid sharing your conclusions of what you see at this point.
   5–10 min

4. **If the group is larger than 6 people**, divide them into smaller groups of 3-5 people. Give them 45-60 minutes to discuss and write answers to the following questions on flipcharts you have prepared on the wall:
   - What stands out in the results- any surprises, questions?
   - What are the positives/strengths? List those.
   - What are the challenges or opportunities for development? List those.
   Underline that the objective in your conversation is to explore rather than explain; please invite each other to share by asking yourself open questions.

   **Alternative:** Hand out Template 1 to everyone and ask them to first individually reflect and answer, then talk about it to reach a shared meaning within the groups of 3-5 people.

   **Example:**

   ![Template 1](image)

<table>
<thead>
<tr>
<th>What becomes clear to you?</th>
<th>What is positive?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predictable but “dull”</td>
<td>Personal and Desired fairly similar and they reflect Volvo IT care values</td>
</tr>
<tr>
<td>Typical maintenance team</td>
<td>Strong will to move upwards to more of common good</td>
</tr>
<tr>
<td>Current values are empty on common good levels</td>
<td>We see need for more focus on corp. evolution</td>
</tr>
<tr>
<td>We want to increase more on internal cohesion (level 5)</td>
<td>Few limiting values Low Entropy (7%)</td>
</tr>
<tr>
<td>Very focused on level 3 and 4 at the moment (last 3-4 months)</td>
<td>Many choose the same value words in desired resp. current situation</td>
</tr>
<tr>
<td>We seem to share information but not co-operate</td>
<td></td>
</tr>
<tr>
<td>Finance is not an issue</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What can be improved?</th>
<th>Anything negative?</th>
</tr>
</thead>
<tbody>
<tr>
<td>More of common good</td>
<td>We have no values on &quot;Client Relations&quot; and &quot;Finance&quot;.</td>
</tr>
<tr>
<td>Co-operate more</td>
<td>Corporate evolution has a potentially limiting value</td>
</tr>
<tr>
<td>Have some fun</td>
<td></td>
</tr>
<tr>
<td>Limiting value &quot;Caution&quot; - What does it mean?</td>
<td></td>
</tr>
<tr>
<td>Client Relations could be improved</td>
<td></td>
</tr>
</tbody>
</table>
5. **Have a plenary dialogue** around all the group's results by reviewing the flipcharts (or templates). Identify the key themes and observations. At the end of the conversation, offer your own insights to those questions.

6. **Next question to be asked:** “What do we need to explore further in order to define our next steps?” When needed you may want to vote, determining which of the values you need to focus on for today’s session. Document the thoughts on a flipchart.

7. **Agree upon which are the key values** to address to perform better together and reach your short- and long term objectives. Conclude with the team what values you would like to explore and work with during the rest of this workshop, and which to address later.

**Alternative:** Hand out Template 2 and ask everyone to identify which potentially limiting values you need to explore and address to become a low fear team. Let everyone select 1-3 potentially limiting values, depending on how high your overall entropy is. And ask which 2-4 positive values they would like to explore and address to become a high performing team and reach our team objectives. Collect all votes in an anonymous way and display the scores on a flipchart. Have a whole group talk and dialogue about the outcome. Don’t only follow the score, but listen to the energy and arguments of the group, before you make your final priority as a group of values to work with. Offer your insights after the discussion is complete.

**B) Exploring key values and behaviours for further development (2-3 hrs)**

1. **Create breakout groups**
   Depending on group size you determine how many values you would like to focus on. We advise to organize breakout groups with each at least around 3 participants. Make sure that each breakout group has some wall-space and a flipchart (or use Template 3a and 3b).

2. **When exploring Potentially Limiting Values**
   a) The survey identified people’s view of what is limiting our ability to succeed. You each have a number of post-it notes. Please write down for the value of your focus: what are the behaviours that we show in the workplace that underline this value? It is important for our leaders to understand how people are experiencing these values or behaviors. Ask the group to please make their comments in complete sentences or clear bullet points on how you see it.
   b) Now ask the group to stick the post-its on a flipchart whilst reading them out.
   c) After this: ask the group to cluster the behaviours and to then come up with one headline for each of the clusters.
   d) Ask the group: in one sentence, how would we define this value for our organization?
   e) Then go into the aspect of impact and ask the group: How much does this value impact our day-day work in terms of costs/ effectiveness/ productivity/ motivation etc? Note down on a post-it.
f) Gather post-its on a flipchart: ask the group to prioritize - what is the biggest cost and can this be roughly quantified?

Alternative: When exploring Potentially Limiting Values (using Template 3a) 45–60 min
a) Hand out Template 3a
b) Assign groups of 3-5 people to work with one limiting value at the time.
c) Ask them to individually start to reflect and define their personal view of “Definition” and “Culture” of their selected potentially limiting value.
d) Then ask the group to talk about their individual views and come up with shared “Definition” and “Culture” of their selected potentially limiting value.
e) Based on this outcome, ask the group to brainstorm actions and behaviors that would reduce or eliminate their selected potentially limiting value in our daily operation. Then ask them for each of their identified actions to define if it is ME (each one of us), WE (a team effort) or the COMPANY (structural issue) that has to make this action happen.
f) Then gather all groups and share and discuss your findings and a proposal of actions.

3. When exploring Positive Values 45–60 min
a) The survey has identified Personal, Current or Desired values that will have a positive impact when those are built upon further. In order to create a picture of what this would look like we ask the group to imagine the value ......................... is now fully adopted by everyone in this team. What are the behaviours that we are seeing us operate by? Ask people to record their thoughts on post-it notes.
b) What does it look and feel like? What are people doing, saying, and feeling? What is different about the place?
c) Once everyone has finished doing this, work as a team to cluster the thoughts into groups and develop a short title to capture the meaning of each cluster
d) Discuss: what is our current position?

• Score on a scale of 0-10, where 10 is “value is fully present” and 0 is “value is not present”.
• Discuss your team-score, explore why there are differences and try to reach consensus on one score. What behaviours are already carried out? What behaviours do we NOT yet see that would make this a higher score (prioritise). In thinking about behaviours, share real life stories that illustrate these behaviours.
**Alternative: When exploring Positive Values** (using Template 3b)  45–60 min

a) Hand out Template 3b

b) Assign groups of 3-5 people to work with one positive value at the time.

c) Ask them to individually start to reflect and define their personal view of “Definition” and “Culture” of their selected positive value.

d) Then ask them as a group to talk about their individual views and come up with shared “Definition” and “Culture” of their selected positive value.

e) Based on this outcome, ask the group to brainstorm actions and behaviors that would improve and grow the selected positive value in our daily operation. Then ask them for each of their identified action to define if it is ME (each one of us), WE (a team effort) or the COMPANY (structural issue) that has to make this action happen.

f) Then gather all groups and share and discuss your findings and a proposal of actions.

---

**Template 3b:**

**Desired value**

<table>
<thead>
<tr>
<th>Desired Value</th>
<th>Definition</th>
<th>Culture</th>
<th>Actions to Create</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooperation</td>
<td>* Sharing problems, challenges and opportunities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Take care and support each other.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Sharing best practice.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Help each other.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Sense of joint responsibility and accountability.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Propose actions - think forward.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Shared vision and long term objectives.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Shared values.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Unselfish helping someone else to succeed or take on a challenge.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* I+1=3</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* You don’t have to ask for co-operation, it just happens!</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* The joy of sharing a success.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Pure and true feeling of “we” - “us”.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Trust - I know I will get help when I have a challenge or ask for help.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>* Lean, but still possible to free resources.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Team name: A-Team**

**Actions to Create**

- **WE**: Have more of common goals. Take active part of defining our shared goals and KPI’s.
- **ME**: You need to sacrifice your own local/functional priorities in order to reach our common goals.
- **COMPANY**: Create a shared source pool of key resources, maximize our utilization.
- **ME/WE**: Improve our internal communication, be open and honest.
- **ME**: Bring up and share our success stories and make them visible.
4. From dialogue to plan

- Ask participants: “Once we get agreement on the values and behaviours, the real journey begins. In leading this, then what are the top three things you as a team can do to solve current bottlenecks and/or make those aspired values come alive and stay real?”
- Be specific, actionable, and measurable.
- Also ask the group: if you yourself were to take one step in bringing the journey on this value more to life in your workplace: what step would you be prepared to take?
- Note all suggestions; those will form the basis for your Culture Development Plan – Template 4 (See example on page 54).

Example:

Template 4: Culture Development Plan

<table>
<thead>
<tr>
<th>Value</th>
<th>Prioritized actions/behaviours</th>
<th>Follow up (How)</th>
<th>By When</th>
<th>By Whom</th>
<th>Status</th>
</tr>
</thead>
</table>

If time allows you, then involve the whole group in identifying the actions and behaviors and put them into your Culture Development Plan. If you run short on time, you could also assign a small group who takes all the proposed actions and works them into a Culture Development Plan. The proposal plan will then be presented to the whole team for comments and approval at a later meeting.

5. Thank everyone.

Explain next steps.
Ask for some fast feedback on how the session went for people – what worked well and/or what could be improved.
<table>
<thead>
<tr>
<th>Team name:</th>
<th>Reflection on results</th>
</tr>
</thead>
<tbody>
<tr>
<td>What becomes clear to you?</td>
<td></td>
</tr>
<tr>
<td>What is positive?</td>
<td></td>
</tr>
<tr>
<td>Anything negative?</td>
<td></td>
</tr>
<tr>
<td>What can be improved?</td>
<td></td>
</tr>
<tr>
<td>Team name:</td>
<td>Desired Values</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td>Potentially Limiting Values</td>
</tr>
</tbody>
</table>

Template 2: My priority of values to work on
### Template 3a:

<table>
<thead>
<tr>
<th>Potentially Limiting Value</th>
<th>Definition</th>
<th>Culture</th>
<th>Preventive actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do WE define this value?</td>
<td>How does it look like/appear in our daily work situations?</td>
<td></td>
<td>What actions can we* take to make this value grow? *) ME personally, WE as a group and the COMPANY / Management?</td>
</tr>
</tbody>
</table>

**Team name:**
<table>
<thead>
<tr>
<th>Team name:</th>
<th>Desired value</th>
<th>Definition</th>
<th>How do WE define this value?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture</td>
<td>Actions to Create</td>
<td>How does this value (behaviour) look like when at its best?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Actions to Create</td>
<td>What actions can we take to make this value grow?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Actions to Create</td>
<td>ME personally, WE as a group and the COMPANY / Management?</td>
<td></td>
</tr>
<tr>
<td>Team name:</td>
<td>Value</td>
<td>Prioritized actions/behaviours</td>
<td>Follow up (How)</td>
</tr>
<tr>
<td>-----------</td>
<td>-------</td>
<td>--------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Template 4: Culture Development Plan
Optional worksheet for CVA analysis

Based on the results of CVA, complete the following statements:

a. The organization/team has the following matching personal and current culture values:

b. The organization/team has the following matching current and desired culture values:

c. The organization/team identified the following potentially limiting values:

d. The organization/team has a level of cultural entropy of:

e. The most important Value Jumps—the values that employees want to see more of are: These are the values that scored more highly in the Desired Culture than in the Current Culture.

f. Based on the results of this survey we identified the following actions to improve the organization/team’s performance:
   The goals should be SMART – Specific, Measurable, Agreed, Realistic, Time-Phased.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Description</th>
<th>Alignment Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. 3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What I have learned about the improvements I need to make to improve the values alignment of my organization/team:


VALUES IN ACTION

Session Leader Guide

This workshop is especially designed to help you in a ‘wanted values and behaviour’ dialogue within your team.

The workshop is useful in all situations of teamwork. It is recommended that you revisit this type of dialogue and discussion with all your stakeholders, for example customer, sponsor, steering committee, partners, suppliers, team members etc.

The workshop focuses on specific common team situations where we leave mental fingerprints behind us depending on the behaviour we choose to use. At a start-up of a team it helps define the expectations and demands. It is also helpful later when the team goes through different phases and is being reshaped for ‘follow up’, ‘reflect’, ‘recognise’ and/or ‘fine-tune the defined and wanted behaviours’.

This workshop is built on 4 typical scenarios;
1) group meeting with your team
2) internal team meeting
3) customer meeting
4) upset customer on the phone

You choose scenarios according to your specific situation at the moment in your team. The intention is for you to address the predefined examples of daily situations in these 4 scenarios and decide what is an acceptable and wanted behaviour. You then outline what is unacceptable behaviour in these types of situations, and you should also describe the typical situations expected for your specific team.

PURPOSE
To reflect and discuss behaviours in different day-to-day work situations with your team stakeholders. To align our behaviours with your own, or the customer's espoused core values.

OBJECTIVE
To agree on what is acceptable behaviour and also what is unacceptable behaviour in different day-to-day work situations.
To agree on what we should all do to reinforce acceptable behaviours and what to do if we don't act according to our agreed behaviour.

TIME
The estimated time for this exercise is approx. 2 - 3 hours.
BEFORE THE SESSION

1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. It is best if everyone can sit around a large table in order to put the worksheet in the middle. If your team is large you may use many tables, and if so prepare good mixed groups of 3 - 5 persons
4. Send out the invitation for your group meeting at least two weeks before the meeting. Communicate Purpose and Objective, when, where and who will be involved.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. There are suggested supporting slides at www.valuescentre.com/getconnected.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (there is a suggested template at page 172)
7. Try to come at least 20 minutes before everyone else.
8. Make sure the meeting room is ready with all the materials needed. Prepare the following material for each groups of 3 - 5 persons:
   - one scissor per table,
   - a set of post-it notes,
   - a flip-chart page,
   - a whiteboard pen
   - a copy of all the selected situations (attached at page 147-150).
   - a form to report the selected 3 - 5 key situations ( attached at the end at page 151)
9. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION

1. Start the session by presenting the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Walk the team briefly through your company core values and explain the link to your team and its specific challenges. Explain why we must work with our team culture.
3. Share your thoughts and feelings about this type of work (investment) and the benefits and challenges you may see. Underline why you personally feel/think it is important for us to work with this. Use your emotions to express this.
4. If you have done the exercise with your team earlier, review your progress on “Where you are on your team culture-building journey?” What has been done/ results/ successes? What do you intend to do in the future?
5. Introduce the exercise by reading out the question and steps to be taken by using the agenda slide. Clarify how you intend to use the material after the session. Make sure everyone understands the exercise. Allow time for questions and concerns.
6. Ask each group to prepare their flip-chart paper. Ask them to write espoused company values or team values in a triangle or around a big circle on their flip chart; see an example from Volvo IT Volvo Group below.
7. Then ask them to cut up the cards with the selected day-to-day situations from all four scenarios. One situation only for each card.

Examples:

Volvo IT

Volvo Group
8. Ask the groups to place the cards with the different day-to-day situations relevant to their company or team espoused Core Values on the prepared sheet. It is important that the groups discuss and agree where to put the cards in relation to the Core Values. (See example picture).

9. Now ask the groups to think of any important key situations not mentioned in the predefined situations that they believe should be added. For example, what other day-to-day situations are there in our team where we must have a common behaviour? Ask each person to write down 1 - 3 additional new situations on the post-it notes. One situation only on each post-it.

10. Instruct everyone to place each of their post-it notes with the new key situations in relationship to their espoused Core Values. NB! Ask them to explain to the others what key situation is being added and which Core Values it is most relevant to.

11. From all the situations depicted, each person must select his/her 3 - 5 most important situations where they think we need to have a common behaviour to be able to have a successful team. Then, each group must come to agreement on 3 - 5 prioritised key situations. Mark them clearly and place them on a list on the side. (See picture).

12. Now you have a map of your most important team situations. Lead the team in a discussion to come to an agreement on what should be the WANTED/BEST behaviour and what is UNACCEPTABLE behaviour in each of the selected 3 - 5 key situations. Use the template on page 151.

13. Make sure everyone gets the opportunity to voice his/her view during this phase. Be assertive and probe for questions. Remember, the process is as important as the outcome. Ask the group(s) to write down their conclusions on the template you have handed out (page 151). You will collect these at the end of the workshop.

14. If you have time, use the whiteboard/flipchart to display and align all groups’ suggested key situations and defined wanted/best and unacceptable behaviour. The whole team must now select 3–5 situations and behaviours they can agree on as being top priority for your whole team.

15. Conclude the exercise by reading out your final conclusions. Which situations are we already good at? Which situations call for changed behaviour? What should we do to change these behaviours?

16. Clarify agreed upon actions and how we should follow up on our ambitions.

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting with your agreed key situations and wanted/best and unacceptable behaviours. Enclose the slides you showed (if requested by any of the participants).

2. How do you intend to reinforce your team’s conclusions and make your progress visible? For instance, visual aids, questions, recognition, etc.

3. Now, that you have started to create a shared understanding of expected norms of behaviour, i.e., “mental fingerprints”, make sure your own personal priorities are aligned.

4. How do you intend to follow up the session? A good idea is to plan a team follow-up discussion and also an individual follow-up at your performance review meeting with the participants.
<table>
<thead>
<tr>
<th>Agenda</th>
<th>(proposal and facilitator notes)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Introduction</strong></td>
<td>10 min</td>
</tr>
<tr>
<td>Align your team challenges and wanted culture and why it is important to invest in our team culture.</td>
<td></td>
</tr>
<tr>
<td><strong>2. Group reflection</strong></td>
<td>5 min</td>
</tr>
<tr>
<td>Share your thoughts and feelings about this type of work and the benefits and challenges you see.</td>
<td></td>
</tr>
<tr>
<td><strong>3. Work in small groups</strong></td>
<td>60 – 90 min</td>
</tr>
<tr>
<td>a. Place the selected team situations in relation to your Core Values on the sheet.</td>
<td></td>
</tr>
<tr>
<td>b. What other day-to-day situations are there in our team where we must have a common behaviour? Ask each person to write down their 1 - 3 situations on post-it notes. Instruct the team members to place their post-it notes in relationship to our Core Values on the sheet.</td>
<td></td>
</tr>
<tr>
<td>c. Then lead everyone to select the 3 - 5 situations which they agree are the most important for achieving a more competitive and successful team.</td>
<td></td>
</tr>
<tr>
<td>d. Once the map is completed, lead the team in a discussion to agree on the wanted/best behaviour and unacceptable behaviour in the selected key situations.</td>
<td></td>
</tr>
<tr>
<td><strong>4. Group dialogue</strong></td>
<td>15 – 30 min</td>
</tr>
<tr>
<td>Gather the whole group and let the small groups share their results. Note down comments from the participants.</td>
<td></td>
</tr>
<tr>
<td><strong>5. Conclusion and next steps.</strong></td>
<td>10 min</td>
</tr>
<tr>
<td>Should we use reflections/feedback to reinforce our learning from this exercise?</td>
<td></td>
</tr>
</tbody>
</table>
**Scenario 1 – Group meeting with your team**

<table>
<thead>
<tr>
<th>People don't appear at meetings and don't inform anyone that they will not participate</th>
<th>It's difficult to find resources to handle a request from another internal department (I don't have the time…)</th>
<th>A small request coming from another internal department. The team is in a hectic period and doesn't feel that this is the most important issue to focus on right now.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:1</td>
<td>1:2</td>
<td>1:3</td>
</tr>
<tr>
<td>That's not my/ our responsibility – “isn’t there anyone else who can handle this request…?”</td>
<td>Offering alternative solutions to the request – be proactive</td>
<td>Share knowledge and see possibilities in using other departments.</td>
</tr>
<tr>
<td>1:4</td>
<td>1:5</td>
<td>1:6</td>
</tr>
<tr>
<td>Us &amp; them. * I've heard they never deliver on time and they cost too much…*</td>
<td>Recognise good input/ listen to other team members' input and ideas.</td>
<td>Unclear roles/ decisions - at the end of the meeting</td>
</tr>
<tr>
<td>1:7</td>
<td>1:8</td>
<td>1:9</td>
</tr>
</tbody>
</table>
### Scenario 2 – Internal Team meeting

<table>
<thead>
<tr>
<th>2:1</th>
<th>Bad meeting behaviour – people are not prepared - haven't read the material.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:2</td>
<td>Handling new customer demands – risks of increasing costs and delays.</td>
</tr>
<tr>
<td>2:3</td>
<td>Blaming each other – &quot;you're the weakest link in this team...&quot;</td>
</tr>
<tr>
<td>2:5</td>
<td>Conflicts within the team – picking on each other.</td>
</tr>
<tr>
<td>2:6</td>
<td>Manager wants you to put some more time into another project when you are already fully booked – prioritise.</td>
</tr>
<tr>
<td>2:7</td>
<td>Listening to other team members' input.</td>
</tr>
<tr>
<td>2:8</td>
<td>Taking the global perspective into consideration – not being close-minded.</td>
</tr>
<tr>
<td>2:9</td>
<td>Bad meeting behaviour – people are reading mails, whispering, discussing other things during meetings.</td>
</tr>
</tbody>
</table>
### Scenario 3 – Customer meeting

| 3:1 | The customer doesn't feel we have prioritised him enough. | 3:2 | Customer questioning our solution – "Is this really the best solution..." | 3:3 | The customer asks questions you don't understand. |
| 3:4 | New/ additional terms from the customer. | 3:5 | You make promises out of good will that we cannot keep - you are not synchronized towards the customer. | 3:6 | The customer questions our schedule, another company can do it much faster, to a similar price. |
| 3:7 | The customer has heard a rumour that we cannot deliver. | 3:8 | The customer wants a local solution (and we're a global one). | 3:9 | The customer wants to know why he should choose your team as a supplier? |
### Scenario 4 – Upset customer on the phone

<table>
<thead>
<tr>
<th>4:1</th>
<th>4:2</th>
<th>4:3</th>
</tr>
</thead>
<tbody>
<tr>
<td>An upset customer calls and you answer – the person responsible is not available and you are about to attend another internal meeting.</td>
<td>It is not the first time the customer has difficulties in finding the right person.</td>
<td>The customer is &quot;degrading&quot; my colleagues.</td>
</tr>
<tr>
<td>4:4</td>
<td>4:5</td>
<td>4:6</td>
</tr>
<tr>
<td>You are not qualified/competent enough to solve this problem.</td>
<td>Customer wants to add something that is not in the agreement.</td>
<td>The customer disagrees with your proposed action – suggests we bend the rules.</td>
</tr>
<tr>
<td>4:7</td>
<td>4:8</td>
<td>4:8</td>
</tr>
<tr>
<td>The person I need for an action plan can’t be reached due to national holiday.</td>
<td>You have to do “that little extra” when the conversation is over (it is not just to satisfy – you have to do more).</td>
<td></td>
</tr>
</tbody>
</table>
### Values in Teams Outcome

<table>
<thead>
<tr>
<th>Priority</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Behaviour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wanted/Best</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unacceptable</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NB! Don’t forget to agree how we should follow up, like using feedback, reflection, measurements etc.
MY TEAM’S LEVEL OF TRUST

Session Leader Guide

In order to have a high performing team, there must be a high level of trust in the group. Trust increases the speed at which the group is able to accomplish tasks and takes the bureaucracy out of communication. The principal components of trust are character and competence. Trust builds internal cohesion. Trust is the glue that holds people together and the lubricant that allows energy to flow.

The exercise is based on Richard Barrett’s book “The New Leadership Program”.

The Trust Matrix: The principal components of trust are character and competence:

Character is a reflection of how you are on the inside, your intent and the level of integrity you display in your relationship to others. These depend primarily on the level of development of your emotional intelligence and social intelligence. Intent is demonstrated by caring, transparency, and openness; integrity is demonstrated by honesty, fairness and authenticity.

Competence is a reflection of how you are on the outside, your capability and the results you achieve in your role. These depend primarily on the level of development of your mental intelligence, your education and what you have learned during your professional career. Capability is demonstrated by skills, knowledge and experience. Results are demonstrated by reputation, credibility and performance.
PURPOSE
To increase the level of trust in the leadership team.

OBJECTIVE
To identify the strengths and weaknesses of the team with regard to the level of trust they have and make them accountable for improving the situation.

TIME
The estimated time for this exercise is approx. 1 – 2 hours, depending on the size of your team.

BEFORE THE SESSION
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Decide whether you should prepare yourself or use a guest speaker to introduce the workshop and/or create the right atmosphere.
4. Send out an invitation, communicate purpose and objective, when, where and who.
5. Select the slides you intend to use. Look for ideas and select the supporting slides at www.valuescentre.com/getconnected.
6. Make sure the meeting room is ready with all the material needed.
7. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
8. Try to come at least 20 minutes before everyone else.
9. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

DURING THE SESSION
1. Assemble your team and project The Trust Matrix onto a screen or preferably make two large posters so that everyone can see: one for areas of strength and one for areas of challenge.
2. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
3. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their view.
4. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Allow time for questions and concerns.
5. Make sure everyone gets the opportunity to voice his or her view. Be assertive and probe for questions. Remember, the process is as important as the outcome.
6. Conclude the exercise with a shared reflection of the experience and learnings. Ask the question “What have you learned about improving the level of trust in our team”?

AFTER THE SESSION
1. Make sure to follow up and have team reflections on the actions and behaviour that has been identified during the meeting.
Agenda
(proposal and facilitator notes)

1. Introduction
   20 min
   Go through Purpose, Objective and Agenda.
   If needed have an “Ice-breaker” to get everyone connected to each other and the task

   **Ice-breaker:** Ask everyone to recall a moment in time when they experienced a high level of trust. Who was involved? What was at stake? What made it happen? How did it feel? Finalize the Ice-breaker with a collective reflection of your stories about high trust.

2. Definition of “trust”?
   15 min
   Ask the group to define trust. List the key components that come up from the participants on a flipchart or white board so that everyone can read it. Agree on what are the key components.

   **Ask the group to reflect upon:**
   Why is trust so important for us?

3. Our level of trust
   10 min
   Hand out a blank sheet of A4 paper to everyone. Ask everyone to draw a vertical line and grade it from 10 to 1 on their paper (where 10 is high and 1 is low). Ask them to put an “X” on the scale which describes their personal perception of trust in this team. Collect the papers and display all answers on the flipchart.

   **Ask the group to reflect upon:**
   What does our picture tell us about our perceived level of trust?

4. Trust matrix – strengths and weaknesses
   60 min
   **Step 1:** Ask each member of the team to identify which elements of the Trust Matrix they believe are the strongest and weakest in the way the team operates.

   Give every person ten points (stick-on dots or marker pen) to allocate to the strengths and ten points to allocate to the challenges. He or she can allocate the points in any combination of each of the twelve components of the trust matrix.

   As each person comes forward and mark their points on the two posters — strengths and challenges — they should explain to the rest of the team why they have chosen to allocate the points in that way.

   **Step 2:** When everyone has finished allocating their dots it will become immediately obvious what the strengths and weaknesses are in the way the team operates. Based on the results, begin an open dialogue on how to build on the strengths and minimize the weaknesses that the team has collectively identified.
Step 3: At the end of this dialogue, ask each member of the team to state which elements of the trust matrix he or she is least competent in, and what he or she is doing or can do to improve. Use the Handout at the end of this tool.

This exercise makes the whole team accountable for improving the level of trust.

5. Reflection

Have the group reflect on the following questions:
- What was the major thing you learned and took away from this meeting?
- What are the success factors to make our agreed actions happen?
# Level of Trust

<table>
<thead>
<tr>
<th>Trust Matrix Strengths</th>
<th>Trust Matrix Challenges</th>
<th>Proposed Actions to Improve the Level of Trust</th>
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THE ELEPHANT IN THE ROOM

Session Leader Guide

The “Elephant in the Room” (in some countries they say “Moose on the Table”) is a phrase that means the problems we all know exist but don’t have the courage or ability to talk about. These issues or problems get in the way of performance and employee fulfilment and if left unresolved will just get worse and worse.

It is critical that we address these ‘undiscussables’ in a safe but honest way so that we can shift the negative energy leaks and get back to more productive work and harmonious relationships. In our experience, these sessions will be difficult to start but once the issues are out in the open, people will generally be relieved and have a sense that they can move on.

PURPOSE
To address the problems that are caused by people, process or policy issues that people are unwilling or unable to discuss by themselves.

OBJECTIVE
To increase productivity, quality or employee fulfilment by clearing the negative energy that is getting in the way.

PARTICIPANTS
Ideally, bring the whole team together. If you have to select a smaller group, make sure there is a good cross section of the team members.

TIME
This exercise can take between 2 and 4 hours depending on the size and complexity of the issues that arise. You may have a sense of the issues before the session but be prepared for anything to come up. By definition, these are issues that are below the surface and not being talked about so there may be surprises.

FOR MORE INFORMATION
The Thin Book of Naming Elephants: How to Surface Undiscussables for Greater Organizational Success  Sue Annis Hammond (Author), Andrea B. Mayfield (Author)
BEFORE THE SESSION
1. Anchor the decision to do the exercise in your team.
2. Select participants and book a meeting room.
3. Send out an invitation at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who.
4. Make sure the meeting room is ready with all the material needed.
5. If you intend to use a meeting evaluation or reflection, have it prepared in advance (see page 172).
6. Try to come at least 20 minutes before everyone else.
7. Write the Purpose, Objective and Agenda on a flipchart so that everyone can see it during your whole session.

DURING THE SESSION
1. Present the Purpose, Objective and Agenda of the meeting. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Ask the manager to express his/her personal view on how important it is for each participant to clearly understand and articulate their personal values as one of the starting points in our values journey.
3. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Recognise that this may be a difficult discussion so set ground rules for honesty and respect. Disagreement is welcomed but only if it is done respectfully. Allow time for questions and concerns.

AFTER THE SESSION
1. How do you intend to reinforce your team’s reflections and conclusions (if any), and make your progress visible, that is, visual aids, questions, recognition, etc.?
2. Now that you have started to create a shared understanding of personal values and hot buttons, make sure your behaviour and priorities are aligned e.g. how do we walk our talk?
# Agenda

**Agenda (proposal and facilitator notes)**

1. **Introduction to the Exercise**
   
   Go through the Purpose, Objectives and Agenda. Be open to questions.  
   
   **15 min**

2. **Individual reflection and writing**
   
   - Pass out 3 index cards/post-it notes to each participant.
   - Ask them to write down the top three things the group needs to talk about and isn't (undiscussables). This can be done before the session or during.
   - Collect the cards and shuffle to provide some anonymity.
     
     * See variations 1-3 below
   
   **5–10 min**

3. **Group Prioritisation**
   
   - Ask the group to work together to put the cards on a continuum from the most discussable to the least discussable. (You just need a wall and some masking tape.)
   - Pick the three "most undiscussable" cards and have the team discuss them one at a time. Let the group pick which they will tackle first.
   
   **15–30 min**

4. **Group Dialogue**
   
   - Hold the space for both honesty and respect.
   - Encourage exploration of the issue from various perspectives.
   - Start to think about possible solutions.
   
   **1 to 2 hours – take breaks when necessary**

5. **Group Reflection**
   
   “What is the major benefit that has come from our dialogue?”
   
   Note down the different response on a flip chart with the heading “Connect” as they come up. Verify the responses and note where they are shared and agreed.
   
   - **Variation 1**
     
     Everybody writes their issue on a card and after a shuffle and redistribution reads the one in their hand as if it were theirs. Even if it is, the discussion is directed at the secret... not the person.
   
   - **Variation 2**
     
     Before prioritizing and tackling the index cards, ask the participants to list gains and losses for themselves personally and for their work group (or the whole organisation) of not addressing the issues. So for each issue you’ve got a grid with personal and team gains and losses. This gives a strong visual about how the undiscussable is weighing the organisation down.
   
   - **Variation 3**
     
     Post the cards during a break and have everyone come in and read all of the posted undiscussables. After a few minutes for participants to absorb the content, the process questions include:
     
     "what have you learned about our organisation?"  
     "what price do we pay for having these undiscussables?"  
     "Are there any of these that should stay undiscussable and why?" Then go into the prioritisation and dialogue.
FROM CONFLICT TO CREATIVITY
Session Leader Guide

There is great strength in diversity. A team comprised of members with different backgrounds, beliefs, world-views, experiences and skills can bring remarkable creativity and results. Sometimes those differences can get in the way and cause conflict which stifles progress and performance. The interpersonal conflicts show up as “counterproductive dialogues” or awkward silences that take up a lot of energy and create toxic work environments. This in turn prevents team members from co-creating the future.

This experience has been designed to unblock our inner capacity to align perspectives and levels of consciousness within our team. It allows us to manage situations with shared vision and common values.

PURPOSE & OBJECTIVE
- To help team members move beyond conflict into creative collaboration.
- To explore the ideas, beliefs and opinions of others without judgement
- To harness the diverse views and beliefs of team members into new creative new solutions

TIME
The estimated time for this exercise is approx. 2 – 3 hours.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room. Make sure that the room makes it possible to split up the group into pairs and work in pairs in an acceptable way.
4. Send out the invitations for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
5. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
6. Try to come at least 20 minutes before everyone else.
7. Make sure that you have printed hand outs for all participants.
8. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION
1. Present the Purpose, Objective of the exercise. Highlight when you intend to end the meeting. Ask if everyone will be able to stay for the whole meeting.
2. Introduce the exercise by sharing the steps to be taken. Make sure everyone understands the exercise. Optional: Hand out the Seven Level of Consciousness from page 197. Allow time for questions and concerns.
3. Explain the strengths and possible pitfalls of team diversity. Use the Seven Levels Model to show that different people may see situations and challenges differently depending on their values, beliefs and world views. E.g. people who are strongly...
focused on level 2 will want to create a sense of belonging, inclusion and harmony but may get stuck in consensus. People who are strongly focused at level 3 want to create efficiency, order and excellence but they may forget to create a shared vision where team members feel aligned and committed.

4. Sensitive to ensure that everyone gets the opportunity to voice his or her insights and learning from this exercise. Remember, the process is as important as the outcome.

5. Conclude the exercise with a reflection followed by what you expect to be the next step on your culture build-up journey.

AFTER THE SESSION

1. How do you intend to reinforce your team’s reflections and conclusions (if any), and make your progress visible, that is, visual aids, questions, recognition, etc.?

2. How will team members support each other in taking the next steps or actions they have identified?
## Agenda

(proposal and facilitator notes)

1. **Introduction to the Exercise**  
   Go through Purpose, Objective and Agenda. Be open for questions.  
   
2. **Individual work and reflection**  
   Ask the participants to complete the hand out and work through the steps in the exercise individually. This is personal reflection time.  
   
3. **Role plays**  
   Form pairs and ask the participants to share their stories and insights.  
   
4. **Whole Group Reflection**  
   Have the group reflect on what was the major thing they learned and took away from this exercise.
Process for understanding and planning your action

1. Select a difficult working situation (involving real team members) that you wish to transform “right after” this experience.

2. Describe the unsatisfactory response that you have currently received from your colleagues or team member partners: e.g.
   - What are they in denial about…
   - What have they shown much resistance to…
   - What have they agreed to, but things are not moving forward as they should...

3. Describe what you wish to happen or what you want to achieve with the team: e.g.
   - I want them to commit to…
   - I want them to fulfil what they have promised, in relation to …
   - I want to see accountability…

4. Remember the contents of your last conversation with these people, about the issues mentioned in steps 2 and 3.

5. Write the dialogue and the impact of the conversation on performance. Also write about their answers when deadlines or requirements had not been met.

6. Albert Einstein famously wrote that “Problems cannot be solved in the same level of consciousness they has been created”. To transform this situation or relationship, you must understand the conflict between the Levels of Consciousness that you and those you are in conflict with are currently using in these conversations.

7. Use the Seven Level of Consciousness Diagram on page 197 to identify:
   - The current Levels of consciousness (ideas, thinking, solutions) that are causing the conflicts or blocks.
   - The required Levels of consciousness that will enable you to co-create the solution or path forward.

8. Once you have your “Action Plan”, we recommend a Role Play to practice the use of new Levels of Consciousness.

Instructions for the development of the Role Playing Experience

Role A: You will represent the other person (the person you are in disagreement or conflict with)
Role B: One of your colleagues will represent you (using your plan and the protocol)
Role C: The third colleague will be the observer (giving feedback to participant “a” and changing roles with participant “b” every five minutes)
### Role Play Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Role</th>
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<tbody>
<tr>
<td>1.</td>
<td>Create a positive, not threatening, “win – win” atmosphere; the objective is building trust driven commitment.</td>
<td>( All )</td>
</tr>
<tr>
<td>2.</td>
<td>Give positive feedback to your team member partner, on real working and management issues significant for this person.</td>
<td>( B \text{ and } C )</td>
</tr>
<tr>
<td>3.</td>
<td>Communicate the objective of the conversation, in a direct and clear way. Use specific and short statements, to describe one matter at a time.</td>
<td>( All )</td>
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<tr>
<td>4.</td>
<td>Actively listen to their responses, without judging them, identify from which of Seven Levels of Consciousness they reason and argue. the Levels of Consciousness.</td>
<td>( B )</td>
</tr>
<tr>
<td>5.</td>
<td>Use open questions to identify “how and from where” they perceive the barriers preventing the achievement of the results you want to achieve.</td>
<td>( B )</td>
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<tr>
<td>6.</td>
<td>Paraphrase the answers, to check/recognise the positive intention of their current levels of Consciousness by stating: “I can see what you’re interested in…” “I appreciate your concern about… in order to…”</td>
<td>( B )</td>
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<tr>
<td>7.</td>
<td>Communicate the intention of your requirements, by declaring the benefits at the level of awareness of your colleague.</td>
<td>( A )</td>
</tr>
<tr>
<td>8.</td>
<td>Reconcile the maps, integrating benefits from the perspectives of people involved in implementation.</td>
<td>( A \text{ and } B )</td>
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<tr>
<td>9.</td>
<td>Check your team member's comprehension of the “win-win-win” benefits of implementing the new collaborative plan.</td>
<td>( A )</td>
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<tr>
<td>10.</td>
<td>Come to an agreement on how and when to implement the requirements; if you come across more problems, restart this process again from step 4.</td>
<td>( All )</td>
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<tr>
<td>11.</td>
<td>Close the conversation, celebrating the agreement and expressing your confidence in a timely implementation.</td>
<td>( All )</td>
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### Reflection on your findings in this experience:

**What have I discovered during this experience?**

**What have I realized?**

**Which is my commitment?**

**How can I make the best use of this technique in my work?**
TEAM LEARNING
Session Leader Guide

We all have individual preferences on how we learn best. Some learn best when they plan what to do, while some benefit most from doing. Others learn best from reflecting on what has already been done and then there are those who are at their best when they can connect with others and devise a mutual purpose.

What we all have in common is that as adults we need time and space to debrief and reflect on what we have done in order to augment our earlier beliefs and ingrained principles with new beliefs and values. Often we feel that we have no time for reflection and learning. However, team learning helps each individual envision their self in the change curve, reduce the time it takes to transform and learn and thus enhance the group’s ability.

Flexible action and ability to learn collectively is crucial for survival and success in an environment of faster change, and that calls for transformation of our behaviour!

This exercise is built on three main blocks, where the recommendation is to use the first two blocks initially, while the last block could be run on a regular basis. The blocks are:

1. The Prerequisites for Our Learning
2. Team Learning Wheel and Our Learning Styles
3. Team Reflection


PURPOSE
To collectively enhance your team’s ability to transform and learn as you move through the team’s life cycle.

OBJECTIVE
At the end of the exercise everyone should be able to learn from what is happening here and now. Then move beyond their own comfort zones and challenge and make real value shifts.

TIME
This varies considerably. Sometimes a short 10-minute reflection gives a lot, while in other cases an entire day or two will be insufficient.

The most important thing here is to create a language and a way of working with your team to achieve team reflection. The team will need time and repetition to include in their shared culture the process of how they learn together.

Time allocation must come from you as the leader – you need to prioritise and give them the go-ahead to use time for reflection.
BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room where it is possible to work in pairs in an acceptable way.
4. Send out the invitation for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You can find suggested slides at www.valuescentre.com/getconnected.
6. Try to come at least 20 minutes before everyone else.
7. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION
1. Follow the proposed agenda.

Block 1: The Prerequisites for Our Learning
2. Ask the participants to individually reflect on the topic: “Think of a time in your life when you learned more in a short time than any other time. Describe the situation, your thoughts and feelings”
3. Divide the group into pairs and let them share their reflections.
4. Gather the group again for a whole group reflection on the question: “What were the prerequisites that made your learning experience so effective?”

Block 2: Team Learning Wheel and Our Learning Styles
5. Draw up the figure described below on a whiteboard or flip chart. Start by asking everyone to draw the same two axes and labels on a piece of paper. Ask them to first judge themselves if they are "More Concrete" or "More Abstract" as a person. Mark with an "X" where they feel it best describes themselves. Then ask the same regarding "More Action" or "More Reflection"? Mark with another "X" then draw an horizontal and a vertical line from the two xes. And make a big "X" in the graph as shown below.
6. Ask each one of the participants to come up and plot their “X”.
   The outcome for the whole group could look similar to the example below.

7. Find the centre point at each axis and draw one vertical and one horizontal line from these centre points, as in the figure below.

8. Show and introduce the slide below and let the group reflect on the questions:
   • “What does it say about the group learning style?”
   • “Which are our strengths?”
   • “Which steps do we go through in our daily work? Do we take the shortcut (the dotted gray arrow) or do we take time for Public reflection and Shared meaning?”

Block 3: Team Reflection
9. Emphasise the difference between discussion and dialogue (See p. 22). Discussion is based on right and wrong statements whereas dialogue is based on the belief that there is no right and wrong. Good reflection is based on dialogue and fearless statements about what each team member has experienced in terms of feelings, thoughts and learning. A good dialogue emerges easier when “we agree that we don’t have to agree”.

THE TEAM LEARNING WHEEL

Source: Fifth Discipline - Field book
10. Write on a flipchart what you want the group to reflect on. Choose a situation, an experience or find your own topic or select one from the attached example; “Possible reflective questions” at page 170-171. Encourage clarification and adjustments to what you have written. Try to be specific in time and scope.

11. Ask everyone to work individually for 5 - 7 minutes writing down their own feelings, thoughts and learning about the selected situation or topic.

12. Invite them to start sharing. Encourage and give recognition to everyone who is sharing, especially in the beginning and during the first reflections, in order to diminish fear and build trust in the process. Work with Listening, Voicing, Respecting and Suspending. Focus on exploring and explaining. Don’t steer or judge. Trust the process. Welcome whatever emerges.

Wrap up

13. Have a team reflection of what insights the exercise has given, and how it might impact own mindset and ambitions to strengthen skills (look at the attached reflection questions; “Team Follow up & Reflection” on page 172). Write down the team reflections on a whiteboard/flip chart so that everyone can see and build on each other’s reflections.

14. Let the team conclude what they find as critical for them in order to get a more fruitful learning climate.

15. Ask if everyone can agree to set aside more time for Reflection in their daily work and at meetings. Try also to come to an agreement on how to follow up the agreed intentions.

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).

2. How do you intend to follow up the session? A good idea is to plan a follow up dialogue.

3. Plan for your next reflection, not too far away in time.
## Agenda
(proposal and facilitator notes)

<table>
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<th>Block 1 (Optional)</th>
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<tbody>
<tr>
<td><strong>1. Introduction</strong></td>
<td>10 min</td>
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<tr>
<td>Go through Purpose, Objective and Agenda. Be open to questions.</td>
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<tr>
<th>Block 2 (Optional)</th>
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<tr>
<td><strong>2. The Prerequisites for Our Learning</strong></td>
<td>20 – 30 min</td>
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<tr>
<td>Ask the participants to individually reflect on their personal learning experiences. Let them share their reflections in pairs.</td>
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| **3. Group dialogue** | 10 – 20 min |
| Let the whole group share and reflect on what were the prerequisites that made their learning experience effective. |

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<th><strong>Block 2 (Optional)</strong></th>
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<tbody>
<tr>
<td><strong>4. Team Learning Wheel and Our Learning Styles</strong></td>
<td>10 min</td>
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<tr>
<td>Ask everyone to individually reflect on their personal learning style related to the diagram on the flip chart according to the instructions.</td>
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| **5. Group Dialogue** | 10 – 20 min |
| Let all the participants try to plot what they regard as where their learning style best fits and continue the exercise according to the instructions. Reflect on the outcome. What do we learn from this picture? |

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<th><strong>Block 3</strong></th>
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<td><strong>6. Team Reflection</strong></td>
<td>20 – 60 min</td>
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<td>Note down a topic or use “Open Space” (see page 66) and let the group choose the topic they find most important to reflect upon at this meeting. Let the participants start with individual reflection (5 minutes) and thereafter start to share their reflections in the group. Note down the reflections on a flip chart, so everyone can see them. Remember: The purpose is the reflection, not to reach conclusions.</td>
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<th><strong>Wrap up</strong></th>
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<td><strong>7. Evaluation of the exercise</strong></td>
<td>20 – 30 min</td>
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<tr>
<td>Have the group reflect on what was the major thing they learned and took away from this exercise and try to agree on how to improve the Team Learning ability in the team.</td>
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### Possible reflective questions:

1. **Describe a situation where our team really made a difference for ME!**

2. **Name two things we really need to start doing, in order to use time more effectively.**

3. **Name two things we really need to stop doing!**

4. **What's the glue that keeps us together in our team?**

5. **How can we see and measure progress?**

6. **What am I really passionate about?**

---

Source: PREERA Consulting
7. What would it take for us to go to the “next level of development” in our team collaboration?

8. What would it take for us to resolve dilemmas with guidance of our vision?

9. What drives me in my life today?

10. What do I need to focus on to create what I think is attainable?

11. What do I think WE need to focus on in order to attain what is possible?

12. What really influences me?
### Team Follow-up & Reflection:

1. What is the most important thing you’ve learnt during the workshop?

2. Rate your overall impression of the exercise on a scale of 1 - 5 (5=high). Complement your rating with a short comment.

3. What suggestions for improvement do you see for this workshop?

4. What are your expectations for the next step after this workshop?

5. Other comments
This exercise helps the team members to be proactive in creating a positive feedback atmosphere within the team that will reinforce, encourage and motivate the team members when facing different types of challenges.

Effective feedback should enable a receiver to walk away understanding exactly what he or she did and what impact it had on them. When the result is this specific and this direct, there is a better chance that the person getting the feedback will be motivated to begin, continue or stop behaviours that affect performance. (Sloan R. Weitzel: "Feedback that works")

This exercise has its focus on the SBI Feedback Model and is based upon “Ongoing Feedback: How to Get It, How to Use It – An Ideas into Action Guidebook” issued by Centre for Creative Leadership.

Many different surveys have shown that positive and accurate feedback is one of the top enhancers of performance. There is also an alternative to this exercise named “Whale Done!” which consists of a book, a DVD and exercise material. This practice has a stronger focus on the positive and how to avoid negative criticism and instead use ‘redirective’ and ‘reinforcing’ positive feedback.

'Whale Done' will help your employees learn how to build trust, accentuate the positive, and when a mistake occurs, redirect the energy for a more productive outcome. It provides a clear, easy-to-use approach that will help employees discover the power of positive relationships and enable them to make more effective choices in their interactions with co-workers. (2002, VisionPoint Productions and The Ken Blanchard Companies)

**PURPOSE**
To collectively enhance your team's ability to use positive and redirecting feedback as a way to strengthen the team spirit.

**OBJECTIVE**
At the end of the exercise everyone should be aware of how their way of giving and receiving feedback can have an impact on both the motivation and performance of their colleagues. A recommendation is to conclude the exercise with an agreement that everyone will strive to apply these skills in their daily interactions.

**TIME**
Estimated time for this exercise is approx. 1 – 2 hours.
BEFORE THE SESSION

1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room that makes it possible to work in pairs in an acceptable way.
4. Send out the invitation for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved. Attach to the invitation a description of the SBI Model that is attached at the end of this tool (pages 176-178) and ask them to read through and reflect on their own way of managing feedback.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find supporting slides at www.valuescentre.com/getconnected. Here you can download the pocket cards, which you can print and hand out as reinforcement material.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance.
7. Try to come at least 20 minutes before everyone else.
8. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.

DURING THE SESSION

1. Follow the proposed agenda on page 175.
2. Gather the group again for a whole-group reflection.
3. Have a team reflection of which insights the exercise has given, how it might impact their own feedback skills and their ambitions to strengthen them (look at suggested reflection questions in the exercise Team Learning; "Team Follow up & Reflection" on page 172).
   Write down the team reflections on a whiteboard/flip chart so that everyone can see and build on each other’s reflections.
4. Let the team conclude what they find as critical for them in order to get a more open and positive feedback climate.
5. Ask if everyone can agree to apply the feedback guidelines in their daily work and interactions. Try also to come to an agreement of how to follow up the agreed intentions e.g. by planning a follow-up meeting, as part of the individual performance reviews, appraisal discussions, etc.
6. Distribute, if available, the pocket cards and promote the use of them as a reminder of the importance of accurate and positive feedback.

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).
2. Make sure you follow up on your agreement and note what you have learnt from your progress of the work with effective feedback. NB! Especially important is that you as a leader “walk the talk” and lead the way to work actively with feedback. Acknowledge people doing things right, when you see them give each other feedback.
3. Build in feedback as a normal way of operating in your daily work.
**Agenda**

(proposal and facilitator notes)

1. **Introduction**  
   Go through Purpose, Objective and Agenda. Be open to questions. 
   10 min

2. **Reflection in small groups**  
   Ask the participants to select a partner and share their reflections/conclusions/concerns regarding feedback on the hand out (page 176-178), that they have read prior to the meeting.  
   10 – 30 min

3. **Group dialogue**  
   Make a presentation of the meaning and benefits of effective feedback. Let the group reflect over what has been presented and share their opinions of what they would like to bring to the team.  
   30 – 60 min

4. **Agree**  
   Based on your reflections and learnings what are your shared meanings? Have the team agree to follow the basic principles outlined on the feedback pocket card.  
   10 – 30 min

5. **Reflection**  
   Have the group reflect on what was the major thing they learned and took away from this exercise.  
   10 – 20 min
The SBI Feedback model

Feedback lets us know how we are doing. It can be used in our everyday work to see if we are meeting expectations. If you have set a developmental goal, it reinforces the changes you are making – it encourages you to continue. If you are in a new job, it will help you understand whether you are learning the new skills that are required.

We must, however, be proactive in creating a positive feedback atmosphere. It is one part of our culture journey.

We recommend the use of the Centre for Creative Leadership’s “SBI Model” (Situation, Behaviour, Impact). The model:

- Provides a framework for structuring information.
- Helps us provide feedback which is specific and helpful.
- Is a safe way to give feedback.

The model is very simple and thus easy to remember and use. To give feedback this way, you describe the situation where the behaviour occurred, then you describe the behaviour that you observed, and finally you describe the impact the behaviour had on you or the group.

- **Situation:** Where and when did the specific behaviour occur?
  “During our meeting today when we were discussing the financial aspects of our new project…”

- **Behaviour:** What are the characteristics, observable actions, verbal and non-verbal behaviours that need to be changed or improved?
  “You interrupted me several times…”

- **Impact:** What are the consequences of the behaviour? What impact does it have on other people? Is the behaviour effective? Ineffective?
  “It made me feel that you were not interested in what I was saying. It made me feel as if you did not appreciate the contribution I was trying to make. I think this strongly impacted the group’s decision-making process because they missed some strategic information.”
# Effective Feedback

## Do's and Don'ts for Receiving Feedback

<table>
<thead>
<tr>
<th>Do</th>
<th>Don't</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Let the person finish what she/he is saying</td>
<td>• Become defensive or explain your behaviour</td>
</tr>
<tr>
<td>• Ask clarifying questions</td>
<td>• Interrupt the other person</td>
</tr>
<tr>
<td>• Ask for specifics if not provided</td>
<td>• Be afraid of silence or pauses</td>
</tr>
<tr>
<td>• Pay attention to your nonverbal responses</td>
<td>• Ask the person to defend his/her opinion</td>
</tr>
<tr>
<td>• Ask the person to give you alternatives to your behaviour</td>
<td>• Seek feedback from those who you know will only give you positive reinforcement</td>
</tr>
<tr>
<td>• Respect those who do not wish to give you feedback</td>
<td></td>
</tr>
<tr>
<td>• Thank the person for being helpful to you</td>
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</tbody>
</table>

Evaluate the Feedback

- **Accuracy:** Who is giving the feedback? What are their intentions? How much do you respect their opinion?
- **Value:** Does the feedback have meaning to you or not? Is it something that can be helpful to you? Do you want to know more?
- **Importance:** What are you going to do about it?

*Source: Centre for Creative Leadership. Ongoing Feedback: How to Get It, How to Use It – An Ideas into Action Guidebook. www.ccl.org*
<table>
<thead>
<tr>
<th>Questions for reflection of own feedback skills.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How often do you give feedback to your colleagues and others?</td>
</tr>
<tr>
<td>2. What is normally the reason for your feedback? Performance, attitudes, behaviours, looks?</td>
</tr>
<tr>
<td>3. What type of feedback do you most often provide? Positive, negative, redirecting?</td>
</tr>
<tr>
<td>4. What holds you back i.e. prevents you from giving feedback more often?</td>
</tr>
<tr>
<td>5. How does it feel when you receive feedback yourself? How do you want it to be given to you?</td>
</tr>
</tbody>
</table>
SKILFUL DISCUSSION
Session Leader Guide

This exercise helps a team to make their thought processes transparent, to bring assumptions to the surface and perhaps challenge them. Also, to look more closely at sources of disagreement.


PURPOSE
To collectively enhance your team’s awareness of the impact of Skilful Discussions on daily performance.

OBJECTIVE
At the end of the exercise everyone should be aware of what impact their behaviour in a discussion could have on the outcome and how to achieve a better result. A recommendation is to conclude with an agreement that everyone will strive to apply these skills in future meetings.

TIME
Estimated time for this exercise is approx. 1 - 2 hours.

BEFORE THE SESSION
1. Anchor the decision to do the exercise with the group.
2. Read through the whole Session Leader Guide – the best thing is to try out the exercises yourself first so you know the key steps.
3. Book a meeting room that makes it possible to work in pairs in an acceptable way.
4. Send out the invitation for your group meeting at least two weeks before your meeting. Communicate Purpose and Objective, when, where and who will be involved. Attach to the invitation a description of what we mean by a ‘Skilful Discussion’ (attached at the end of this document, page 182-184) and ask them to read it through and reflect on their own experiences.
5. Select supporting slides to use at the workshop. Review speaker notes and add your own. You will find suggested slides at www.valuescentre.com/getconnected. Here, you can also download suggested pocket cards, which you can print and use as reinforcement material.
6. If you intend to use a meeting evaluation or team reflection, have it prepared in advance (see page 172).
7. Try to come at least 20 minutes before everyone else.
8. Write the Purpose, Objective and Agenda on a flip-chart so that everyone can see them during the whole session.
DURING THE SESSION

1. Follow the proposed agenda on page 181.
2. Divide the group into pairs and let them share their reflections/conclusions/concerns with their partner.
3. Gather the group again for a whole group reflection.
4. Have a team reflection of what insights the exercise has given, how it might impact their own mindset and ambitions to strengthen their skills (look at the suggested reflection questions in the exercises ‘Team Learning’; “Team Follow up & Reflection”). Write down the team reflections on a whiteboard/flip chart so that everyone can see and build on each other’s reflections.
5. Let the team conclude what they consider critical for them in order to get a more fruitful discussion climate.
6. Ask if everyone can agree to apply these guidelines in their daily work and meetings. Try also to come to an agreement of how to follow up the agreed intentions e.g. by planning a follow-up meeting as part of the individual performance reviews, appraisal discussion, etc.
7. Distribute, if available, the pocket cards and promote the use of them as a reminder of the importance of skilful discussions.

AFTER THE SESSION

1. Write and send out minutes as soon as possible after the meeting. Enclose the slides you showed (if requested by any of the participants).
2. Make sure you follow up on your agreement and note what you have learnt from your progress of the work with skilful discussions.
3. Have a follow up reflection about your discussion climate within 2 - 4 weeks to make sure you all start to practice and live by your skilful discussion agreement. Make adjustment in agreement, if needed.
## Agenda
(proposal and facilitator notes)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Introduction</td>
<td>10 min</td>
</tr>
<tr>
<td>Go through Purpose, Objective and Agenda. Be open for questions.</td>
<td></td>
</tr>
<tr>
<td>2. Reflection in small groups</td>
<td>10 – 30 min</td>
</tr>
<tr>
<td>Ask the participants to select a partner and share their reflections/conclusions/concerns on the handout “What is Skilful Discussion?” (page 182-184).</td>
<td></td>
</tr>
<tr>
<td>3. Group dialogue</td>
<td>30 – 60 min</td>
</tr>
<tr>
<td>Make a presentation of the meaning and benefits of ‘Skilful Discussion’. Let the group reflect on what has been presented and ask them to share their opinions of what they would like to bring to the team.</td>
<td></td>
</tr>
<tr>
<td>4. Reflection</td>
<td>10 – 20 min</td>
</tr>
<tr>
<td>Have the group reflect on what was the major thing they learned and took away from this exercise.</td>
<td></td>
</tr>
</tbody>
</table>
What is a Skilful Discussion?

In skilful discussion, the team intends to come to closure, in order to make a decision, reach agreement, or identify priorities. Skilful discussion incorporates some of the techniques of action learning and dialogue, but it is always focused on a real task at hand. It helps a team learn to make their thought processes transparent, to bring to the surface and challenge assumptions, and to look more closely at sources of disagreement.

The most important part of skilful discussion is the commitment team members make to follow the five protocols.

1. **Pay attention to your intentions.** It is important that each team member understands what she/he wants to accomplish in the discussion. If you are not willing to be influenced, what is the purpose of the conversation? Be clear on what you want and do not mislead others as to your intentions.

2. **Balance advocacy with inquiry.** If this is not done, the team will just sit and listen to each other's position statements. People's assumptions will not even surface, much less be challenged. In this case what people are really thinking will surface in the hallway after the meeting.

3. **Build shared meaning.** If people understood that words are symbols and have different meanings to different people, then everyone would routinely check what others mean and there would be far less miscommunication. If you want to create shared meaning it is very important to use language with precision and to question what is really meant – what is the meaning behind the words? As you talk around the meaning, you will get closer to a precise definition, which everyone can agree on.

4. **Use self-awareness as a resource.** When you are feeling confused, angry, frustrated, concerned, or troubled in a meeting, ask yourself the following questions:
   a.  **What am I thinking?** (pause)
   b.  **What am I feeling?** (pause)
   c.  **What do I want at this moment?** (pause)

You will often end up with insights about the team's assumptions or your own concerns, which you can then discuss with the team.
5. **Explore impasses.** When the team seems to be "running into a brick wall", ask, "What do we agree on, and what do we disagree on?" "Can we pinpoint the source of our disagreement?" Often sources of disagreement fall into one of four categories.
   a. **Facts** – What exactly has happened? What is the “data”?
   b. **Methods** – How should we do what we need to do?
   c. **Goals** – What is our objective?
   d. **Values** – Why do we think it must be done in a particular way? What do we believe in?

Simply agreeing on the source of disagreement often allows people to learn more about the situation, clarify assumptions, and then move forward.

Three things might help the team when this happens.
   a. Listen to ideas as if for the first time. Work at being open to new ideas.
   b. Consider each person’s “mental model” as a piece of a larger puzzle. Look at the issues from the other person's perspective.
   c. Ask yourself (and everyone else): ‘What do we need to do to move forward?’

The Skilful Discussion pocket card also lists nine ways to improve listening in skilful discussion (or any time)!

### Questions for reflection of own experiences

1. **What has dominated the meetings you have taken part in during the last month?**
   - Debate, Discussion or Dialogue? What impact has the discussion climate had on your team performance and result?

2. **Recall a situation when you left a meeting saying to yourself “This was a good and constructive meeting”**.
   - What was the situation?
   - What was at stake?
   - How were you involved?
   - What made this meeting so successful?

3. **What individual and team skills are needed to have fruitful and skilful discussions in our meetings?**
Culture is something intangible and subjective that at first instance could be regarded as difficult to measure in an objective and tangible way. But it helps if we view culture for what it is, something that is growing and developing through dialogue and learning, and avoid the mindset that every measurement has to be rational and numerical. Additionally we need to have ways to recognise and follow up on progress during our journey to grow our wanted culture. This tool provides the potential.

It is based on the collective dialogues and actions that we have done in order to grow our wanted culture during the last 2 - 3 months. The process of developing the report brings to the surface what we have discovered and learned from these actions and dialogues. It also highlights the insights and conclusions that we have reached when analysing the different types of measurements we have done during the last few months. Like what perspectives and conclusions we have reached from engagement surveys, values assessments, customer satisfaction surveys, etc. It also includes our conclusions about whether our wanted culture is growing in the strategic and desired direction or not, and what we intend to do in order to continue to take care of and/or improve our culture.

The approach in this tool is actually a team learning exercise built on Kolb’s learning wheel, with aligned questions regarding our culture journey. The tool is primarily aimed at managers and leaders who lead the cultural transformation in a team or organisation.

**PURPOSE**
To create a shared picture of the status of our current culture journey, through data collection and dialogue.

**OBJECTIVE**
A written two page report displaying our culture, which we can communicate to our steering group/board and to our employees. The Culture Report consists of:
- actions
- measurements and reflections
- strategic alignments
- corrective actions/tools

The approach below describes how you and your team can create routines to describe your culture development on a quarterly basis. As distinct from traditional reports it also offers you and your team a way to recognise and learn from your development, not only reporting your status.
STARTING UP THE PROCESS

1. Anchor the decision to work with quarterly Culture Reports in your Management Team, and agree with your Steering Committee or Board what this will look like and why and how it will be done.

2. Define who should be in charge of the making and driving of the Culture Report, plus who should be involved. The report must be owned by the manager of the team or unit, and shall be a natural part of the standing agenda for follow up on performance. It is recommended that you start by having your Managing Team create your report during the first year in order to understand what it is, and what value it will bring before you delegate the task to someone else.

3. Make sure that “Culture Report” is part of your next performance review meeting. Set aside at least 1 - 2 hours.

4. In preparing for the meeting, make sure you select what actions have been done during the last period, answering the following questions in the different parts of the report:

For the “Create Dialogue” section
- What has been done to create and develop your ability to have focused dialogues around your wanted culture, like our vision, mission and values? It could be development activities like training workshops, reinforcement material, and so on that stimulates and enables us to talk and connect.
- What changes have you made in your “social structure” to make it easier for everyone to behave and act according to your wanted culture and values?

For the “Daily Alignment” section
- What workshops, training, information meetings and other dialogue sessions have been carried out to foster and grow your wanted culture and core values? It could be both planned and structured events as well as informal and unplanned sessions and events that have happened.
- What has been the purpose and objective of these activities? Who or how many have been involved and when did they take place?

For the “Follow up & Reflection” section
- What measurements have been done in the last period that could give us an understanding of our own and key stakeholders’ perceptions of our culture?
- It could be attitude surveys, engagement surveys, Culture Values Assessment and other assessments that visualise our climate and satisfaction among our employees.
- It could be Customer Satisfaction Surveys or Supplier and Partner review meetings that have brought to the surface the satisfactions and perceptions of our behaviour and performance in the relationship and interface with our external stakeholders.
- It could also be outcomes and conclusions from regular meetings and reflection and learning sessions that have been carried out.

For the “Secure Consistency” section
- What are our wanted culture, values and/or norms of behaviour that we have defined and agreed that we would like to grow and develop?
- What are the behaviours and attitudes that we want to reach our long term strategic ambitions and short term plans?
5. Prepare a slide presentation (or a draft Culture Report) that could be used at your quarterly review meeting. Send out the material prior to your meeting so that everyone can come better prepared for the team to focus on reflections and conclusions.

**DEFINE AND WRITE YOUR CULTURE REPORT**

1. Before you start to work with the collected data, make sure you review the purpose and objectives of your Culture Report.
2. Appoint a note taker. It is suggested that you view what is said and concluded during this meeting either on a flipchart, whiteboard or a computer screen. This will make your dialogue and discussions more transparent and focused. Also, you can more easily capture the essence of your reflection and write it into your Culture Report at the end of your meeting.
3. Work step-by-step through the collected data starting with the “Create Dialogue” section.
4. Make sure that the data collected in all sections gives a correct and honest picture of your reality during the last period. Make adjustments if needed.
5. Look at the total picture and have a reflection (remember that the reflection should be based on dialogue and not discussion) by asking yourself:
   - What are you proud and happy about?
   - What can we learn, or what have we learned from our experience of this exercise?
   - What would we like to do differently in the coming period?
6. Pay special attention to the section “Follow up & Reflection” and ask yourself:
   - What becomes clear to you/us when we see the results of our different measurements?
   - Are there any patterns or themes that we can identify that will help us understand the dynamics of our culture better?
   - When looking on what we have done or not done in the “Create Dialogue” and the “Daily Alignment” section, are there any new insights or learning that we should add in our “Follow up & Reflection” section?
7. Pay special attention to the section “Secure Consistency” and ask yourself:
   - Is there anything that we need to reinforce, do differently or add, in order to better grow our wanted culture and core values?
8. Finalize your reflection by reading the collected statements and conclusions and come to agreement on what should or should not be in the official report.
9. Write your Culture Report. It should not be longer than two pages. See template example on the next pages.

**COMMUNICATION OF CULTURE REPORT**

1. Agree within your Management Team how and to whom you would like to communicate your Culture Report. The objective is to use the Culture Report to communicate our culture development to our Steering Committee or Board, and internally to all our employees.
2. It is recommended that the communication of the written report is supported by a short reflection involving and connecting the leaders and employees in your cultural development.
3. In time it may be valuable to review your progress over a longer time period, for example, a year. That could be done by reading the four last reports and then having a reflection session of what we can see and learn.
The way we manage and develop our culture could be presented in four different phases. Each phase has its own focus and purpose, but with strong impact on each other. We present them as a continuous spinning wheel. This report is structured accordingly.

Create Dialogue: Develop new structures and approaches for active dialogues to reach our defined strategic focus areas.

Daily Alignment: Activities and focused dialogues ongoing, to promote our wanted cultural transformation.

Follow up & Reflection: What we measure and learn from our present culture and daily alignment activities.

Secure Consistency: Defined focus areas that need to be strengthened based on our follow up and reflections.

1. CREATE DIALOGUE

2. DAILY ALIGNMENT
Culture Report

3. FOLLOW UP & REFLECTION

4. SECURE CONSISTENCY
CREATIVE MIND - MEDITATION

Session Leader Guide

Creative Mind is a meditation technique that offers the opportunity to expand your awareness. We encourage you to take the time to connect to your body, mind, spirit and soul. This meditation has the potential to help you induce the optimum level of consciousness for any given situation and experience the wisdom to create new possibilities.

PURPOSE
Through individual meditation, slow down our brainwaves in order to connect to our inner wisdom.

OBJECTIVE
Reach a better understanding, clarity and creativity, and to relax and heal our body, mind and spirit.

BEFORE STARTING
• Be clear on your intentions. If you invite others to do this meditation state clearly the purpose and objective. Some people may misinterpret the motivation for an invitation to meditate.
  The professional reasons to meditate are simply:
  • To slow down the brainwaves to connect better to your creative mind.
  • To slow down the brainwaves to help deal with a stressful situation.
  • Slowing down to heal your body, mind and spirit will improve your individual ability to deal with challenging and difficult situations.

• You can download the Creative Mind Meditation for free at www.valuescentre.com/getconnected in MP3 format.

PREPARATION FOR A MEDITATION
1. Find a place where you can be undisturbed for at least 25 minutes.
2. Sit down in a comfortable position with your hands resting on your knees.
3. Use a PC with speakers or headphones, or an mp3 player to play the meditation.
4. Listen and follow the instructions.

Tip: Bring pen and paper to write down what has become clear to you after the session.
The introduction to the meditation will guide you to calm, heal and relax your mind, body and spirit. It may help to familiarise yourself with some of the words used in the instructions. They are shown below.
Why do the Creative Mind meditation?

Scientists have been measuring the electrical impulses the brain generates. These impulses are known as brainwaves.

Brainwaves, like all waves, are measured in two ways. The first is frequency, or speed of the electrical impulses. Frequency is measured in cycles per second (cps or Hz). The second measurement is amplitude, or the strength of the brainwave. Brainwaves range from 0.5 cps to 38 cps and are categorized into four frequencies: beta, alpha, theta, and delta. Each of these is explained below.

**BETA** brainwaves are the fastest frequencies ranging from 14 cycles per second up to 38 cycles per second. Beta is your normal thinking state, your active awareness and thought processes. Without beta you would not be able to function in the outside world.

**ALPHA** brainwaves are the brainwaves of relaxed detached awareness, visualization, sensory imagery and light reverie. They range between about 9 and 14 cycles per second. Alpha is the gateway to meditation and provides a bridge between the conscious and the subconscious mind.

**THETA** brainwaves are the subconscious mind. They range from about 4 to 8 cycles per second. Theta brainwaves occur during dreaming sleep and also during deep meditation. Theta also provides peak experiences such as creative inspiration or times of spiritual connection.

**DELTA** brainwaves are your subconscious mind, the sleep state, ranging from about 4 cycles per second down to 0.5 cycles per second. However, it may also be present in combination with other brainwaves in a waking state, acting as a form of radar, reaching out to understand at the deepest subconscious level things that we can't understand through thought processes. Delta is present in our experience of intuition, empathetic understanding and instinctual insight.

The **Creative Mind** is the term used to describe when the brainwave pattern combines all these characteristics of the different brainwave frequencies at the same time. This brainwave pattern can be found during “peak experience” and in all forms of creativity and high performance. It is a brainwave pattern shared by people in higher states of consciousness. It also appears at the instant of solving a problem, or getting an insight. The “ah-ha” experience.

It combines the intuitive, empathetic radar of the delta waves, the creative inspiration, personal insight, and spiritual awareness of the theta waves, the bridging capacity and relaxed, detached, awareness of the alpha waves, and the external attention and ability to consciously process thought of beta waves.

The **Creative Mind** technique focuses on the breath. You focus solely on the breath, both when you are breathing in and when you are breathing out. If you become aware of a thought, simply acknowledge the thought and return your focus to your breath. The incidence of thoughts will decrease and your inner expanded silence will have the potential to enhance wisdom, creativity and spiritual experience.

Scientific research indicates that a relaxed body is the first step to achieving a relaxed mind. A guide to physical relaxation is included on the Introduction to the meditation.

With regular practice, you will be able to relax almost instantly when preparing for meditation. Additionally, in time, you will be able to scan your body for tension and when you find it, focus on relaxing those specific muscle groups.