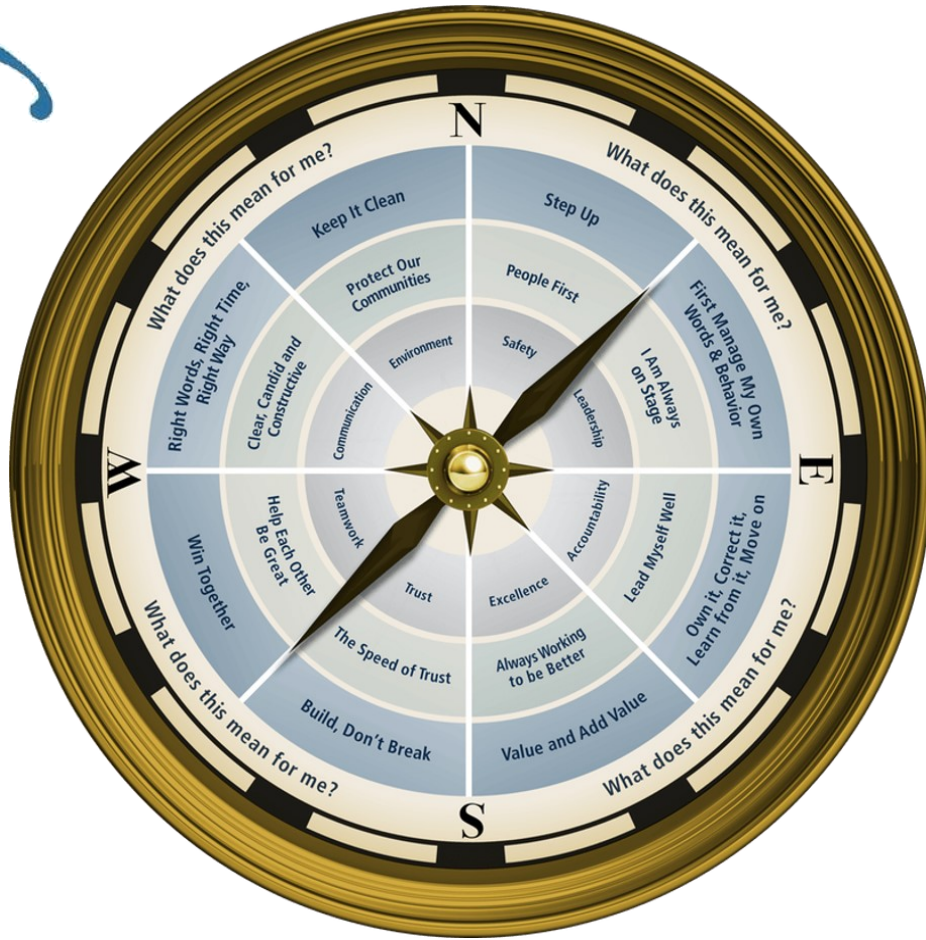




# FACILITATOR HANDBOOK

## Session One: Leadership



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**Assemble the following materials and supplies (provided by the site) in preparation of the session.**

### SESSION ONE MATERIALS

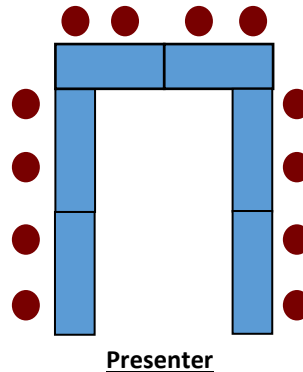
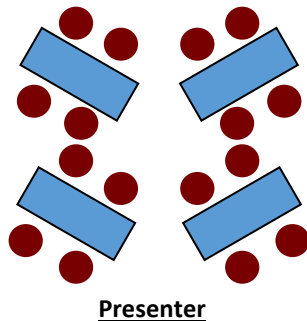
- ☐ Team Member Notebook (with pen) placed at each participant's seat before they enter the room.
- ☐ Name Tags placed at each participant's seat before they enter the room.
- ☐ Small Notecards placed at each participant's seat before they enter the room.
- ☐ Sharpies scattered on tables within reach of each participant (for writing on nametags as well as during breakout teams) placed on tables before they enter the room.
- ☐ Colored Adhesive Dots
- ☐ "Ideal Team Member" Opportunity Assignment notecards (provided by KC&A)
- ☐ Copy of ***The Leader's Code*** for each participant (to be distributed at the end of the session)

### SUPPLIES

- ☐ Copy of Facilitator Handbook
- ☐ Copy of PowerPoint Presentation
- ☐ Link for Video of Closing Story (if using)
- ☐ Clicker (include extra batteries)
- ☐ Timer Tools
- ☐ Flipchart and Easel
- ☐ Blue Painter's Tape
- ☐ Blank Adhesive Nametags
- ☐ Chisel Tip Sharpies
- ☐ 11x17 Paper
- ☐ Extra Pens for Participants

### ROOM SETUP

- ☐ Tables should be appropriately spaced with an unobstructed view of the facilitator and screen/TV monitor.
- ☐ Chairs and tables should be grouped in teams of **three to four members**. Example: 12 team members = four teams of three. Two recommended table arrangements are:



### PRIOR TO THE SESSION

- ☐ Set up computer and check to make sure all aspects of presentation are working (including clicker and sound on Timer Tools).
- ☐ Put on nametag.
- ☐ Place nametag, notecard, and notebook at each seat.
- ☐ Position flipchart and marker at front of room.
- ☐ Have painter's tape ready for use.
- ☐ Have materials staged in back or side of room for distribution during session.
- ☐ Test Timer Tools.
- ☐ Test video, if using

### AS PARTICIPANTS ENTER THE ROOM

- ☐ Plan how teams will be assigned based on seating arrangement and room space. (Three to 4 participants per team, no more than a total of 6 teams. See sample seating arrangements above.)
- ☐ Greet each participant individually.
- ☐ Direct each participant to the session tables. Note: Make sure participants are seated evenly throughout the room.



Begin the session by saying good morning/afternoon/evening and welcoming the participants.

Briefly introduce yourself and any other facilitators in the room. (You'll do a more in-depth introduction with the participants.)

Thank you for joining us for this first in our series of eight conversations about The McWane Way.

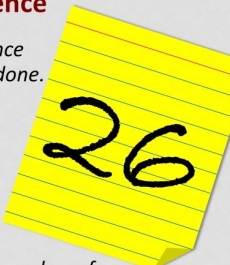
**Work Experience**

*Think back to your earliest experience of earning money for work you've done.*

*Include everything from your earliest job – babysitting, bagging groceries, mowing lawns – up to the present.*

*On your index card, write the total number of years you have been paid to work.*

*Do not include your name.*



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Before we get started, we'd like to ask you to do something for us.

You should have a small (COLOR) index card and a pen in front of you. If you don't, please raise your hand and (CO-FACILITATOR) will bring one to you.

- Think back to your earliest experience of earning a paycheck.
  - Now, this probably wasn't an "official" paycheck with taxes and social security pulled. We're talking about the first time you were paid for doing work. The first time a neighbor gave you \$10 to help him rake leaves. The first time your grandmother gave you a few dollars for taking out the trash.
- Include everything from your earliest job – babysitting, bagging groceries, mowing lawns – up to the present, and think about how long it's been since that first job.
- On the index card, write the total number of years you have been paid to work.
  - For example, if you were 10 when your parents paid you for doing some type of chore around the house and you're now 36, you would write 26 on your card. You've been paid to work for the past 26 years.
- Don't write your name and don't worry about telling us what the job was or how much you earned. We only need to know that total number of years.
- When you're finished, (CO-FACILITATOR) will come around and collect your cards. We'll revisit this in a few minutes.

*Collect cards, total the number of years for all cards, and write the total on another notecard of the same color as the participants' cards using a Sharpie. This will be used in the second "Making the Most of the Time Invested" slide.*



Now we'd like to get to know a little bit about each other. I'd like for each one of you to introduce the person to your right.

Please tell us:

- The person's name
- Their job description and/or position
- Something interesting about the person
  - This is a "fun fact" about the person. Maybe something about their family. Maybe a hobby or interest. Maybe a funny story about them. But let's keep it family friendly. We don't need to know any deep, dark secrets.
- You have a notebook in front of you if you'd like to jot down any notes.

I'll put 3 minutes on the timer. That will give you a little over a minute for you to talk to the person you'll be introducing and a little over a minute to talk to the person who will introduce you. When you hear the chimes, we'll come back together and get to know one another.

Do I have someone who would be willing to start us off with the introductions? *The team member making the introduction should stand. If she/he does not stand, ask her/him to do so. (The rest of the team can hear better if she/he stands. It also sets a tone of respect. Usually a simple "Do you mind standing while you introduce ...." will suffice.)*

Thank the team member who made the introduction and welcome the person who was introduced.

Applaud after each introduction.

Facilitators should introduce each other after participants have finished their introductions.

### McWane Professional Development Objectives

- Reaffirm the importance of *The McWane Way*.
- Further develop a work setting which supports the McWane business model: Safety, Environment, Quality Production, and Profit
- Establish *The Speed of Trust* across departments
- Recognize pride of workmanship – the value each team member brings to McWane.

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You may be wondering why you were asked to be here today and why we're having this series of conversations. Let me take a few minutes to share our objectives. "The McWane Way" is the name chosen to describe the culture that the leadership at McWane wants to see at each of their companies across the organization. When I say "culture", what I mean is simply "what it's like to work here."

The conversations we'll be having over the next couple of months are designed to reaffirm the importance of the McWane Way.

J.R. McWane, the founder of McWane, founded the company on a set of principles, and the McWane Way Compass reaffirms 8 of those principles.

- McWane, Inc. wants to be the absolute best employer in the world, and they want to hire the very best team members.
- Every individual at every McWane company needs to be on the same page...each one of us working to be the best [YOUR COMPANY] team member we can be, and we will work together to make [YOUR COMPANY] the best company it can be.

These conversations are designed to further develop a workplace which supports The McWane Way business model:

- Safety: Safety comes first: McWane wants each of their companies to be the safest place to work. Whatever we do, we are going to do it safely
- Environment: We want to take care of the earth's resources.
- We want to produce a Quality Product that customers want to buy so [YOUR COMPANY] can make a profit. This will make sure we each continue to earn a paycheck.

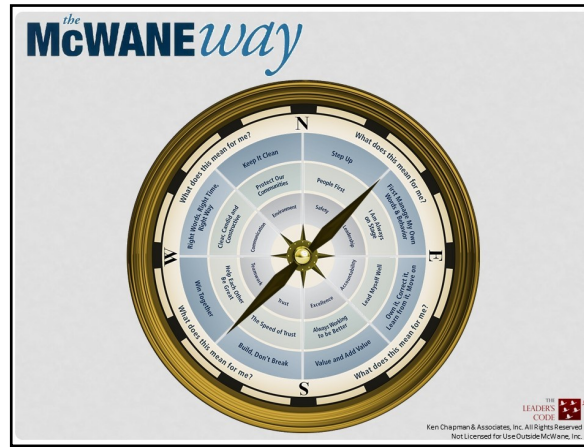
These conversations are designed to establish the Speed of Trust across departments.

- The Speed of Trust is how easily and efficiently problems are solved when team members trust each other.
- We want to work to build trust not only with our team members we work with every day, but also with the other individuals, teams, and departments across the whole organization.

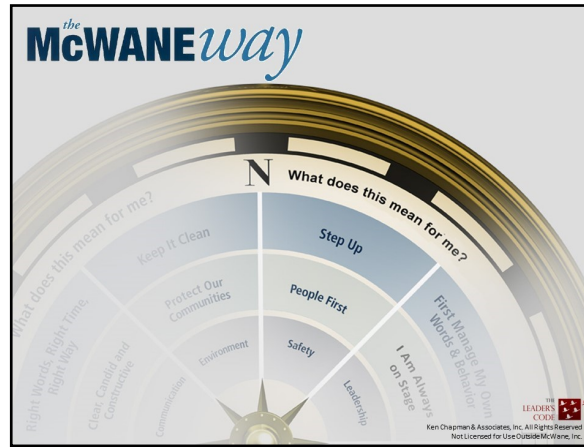
Recognize pride of workmanship – the value each team member brings to [YOUR COMPANY].

- It's important for all of us to realize that [YOUR COMPANY] is our company. We play a part in the success of [YOUR COMPANY]. Everything we do matters. Everything we do either makes it easier or more difficult for [YOUR COMPANY] to make a profit, stay in business, and issue our paychecks.





- You’ve likely seen this image before, but we’re going to break it down and talk about the parts of the McWane Way Compass.
- The image of a compass was chosen to represent the McWane Way for a very specific reason, and that is the value of a compass. What is the value of a good compass? Why would you want a compass when you’re hiking or hunting in the woods? (*Allow participants to respond. Possible responses: find your way home, sense of direction, find North.*)
- The Compass represents “True North.” If everyone across the McWane family of companies is following the same compass, then we all arrive at the same destination – which in this case is a culture. A culture based on those principles J.R. McWane had in mind when he established his first company. Those 8 principles that support and sustain the business.
- The 1<sup>st</sup> ring contains the 8 principles. The principles are the things we believe in. (*Name a few – you don’t have to name all 8.*)
- The 2<sup>nd</sup> ring contains the values. The difference between a value and a principle is this: the value is what we’re willing to pay, in money and other resources including time and efforts, in order to see the principle achieved.
- The 3<sup>rd</sup> ring contains the behavioral principles. These are the behaviors that McWane expects from everyone here at [YOUR COMPANY] as well as at every McWane company, no matter their job, role, or responsibility.
  - Principles and values mean very little if they’re not reflected in behaviors. We have to prove our belief in them and commitment to them by our actions and behaviors. What we do every day matters.



Let's take a look at one of the principles and make sure we understand how all of this works and what the different rings represent. Let's look at the principle, or compass point, of Safety:

- The principle is Safety. In that single word McWane is capturing its commitment to everyone going home healthy and whole every day. [YOUR COMPANY] is committing to providing a safe work environment where each team member can choose to work safely.
- The value is "People First". This is what McWane is willing to "pay" to insure a safe workplace. People come first. The safety of the team members comes before production, and it comes before profit. Let's ask the logical question: is the McWane corporation putting their money where their mouth is. The answer is yes. Since 2004 the corporation has spent over 350 million dollars on environmental, health, and safety outcomes. In addition to that, they've invested over 2.5 million man-hours in training and development to achieve that. Everything from insuring compliance with OSHA and the EPA to teaching safe work practices. The company's commitment is significant and strong.
- The behavioral principle is "Step Up". This is what we all must do. What the Compass is asking us to do in the 3<sup>rd</sup> circle is to step up to keep ourselves safe and to step up to keep those around us safe. You may have noticed when I mentioned the Compass Point of Safety, I said [YOUR COMPANY] provides a work environment where we can **choose** to work safely. Working safely is a choice. I will choose to wear my PPE even if there's not a supervisor around. I will choose to follow the safety policies and rules. I will choose not to cut corners even if it may seem easier, faster, or more convenient. I will value my safety and the safety of my fellow team members because I want everyone to go home healthy and whole at the end of the day. I will step up to keep myself and my team members safe.
- The 4<sup>th</sup> ring says the same thing all the way around: "What does this mean for me?" The answer will most likely be different for each one of us. Safety to a team member on the floor is different from safety to a team member in maintenance. It's different still for an admin in the office. But it's still critical to the health and success of the team and the company.



### Are These Session Standards Agreeable?

- Silence cell phones.
- No “active” email & texting.
- If it’s necessary to take a call or return a message, please leave the room. Step away so that your conversation does not interrupt the team discussion.
- Refrain from side conversations.
- Personal stories or examples shared by team members remain in this room.



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Before we go any further, we need to set up standards for our sessions. We have some that we suggest:

*Each time ask, “Is it agreeable that we ...?” before reading the standard and then after describing it ask, “Is that agreeable?”*

- Silence cell phones: turn off our bells and whistles so we don’t interrupt the conversation.
- Have no active emailing and texting. It’s kind of contagious. One person checks their phone and responds to a message and then one by one everyone else thinks about checking their messages.
- BUT we know that everyone in here has important things going on at work and outside of work. There may be things that require our immediate attention. If it’s necessary to take a call or return a message, please leave the room. Step away so that your conversation does not interrupt the team discussion. We’re all adults. You don’t need to ask permission. Simply slip out quietly and return as soon as possible so we don’t miss out on what you have to add to our conversation.
- Refrain from side conversations. It can be pretty noisy in this room, even without extra conversations. We want to make sure that everyone can hear. We also want to make sure that everyone benefits from what you and your table team have to add to the discussion.
- Personal stories or examples shared by team members remain in this room. We want you to share situations where you’ve seen what we’re talking about. We also want you to share situations where you feel like the process didn’t work. We want you to feel like you can talk freely while you’re in the room.
- After you go through all of the points, say, “These are our suggestions. Is there anything you would like to add?” If no one asks, you may want to mention that you will be providing them with a short break approximately halfway through each session.
- These are the standards that will guide all of us each time we get together. [CO-FACILITATOR] and I will observe these standards as well as all of you.



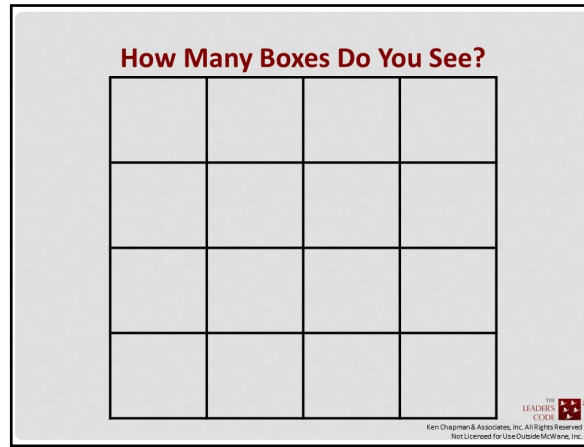
As we begin our session, we want to make sure you make the most of the time invested in these conversations. You're going to be investing about 16 ½ hours of time into this process. That's 16 ½ hours of your life, but it's not just your time that's being invested. This will also be 16 ½ hours when you're being paid, but you're not working in your normal role. Someone else may be covering for you, or your job may not be done while you're in this room. Production may dip a bit while you and your team members are here. We want to make sure you make the most of this investment.

First, we ask that you keep an open mind.

You may be thinking, "I've got an open mind." But I ask you to consider this: the older we get, the more comfortable we become with what we already know. This is natural, because what we know has served us well up to this point in our lives. And sometimes we get to the point where we think we know everything we need to know.

There's always something to learn if we allow ourselves to open our minds.

Let's consider this example....



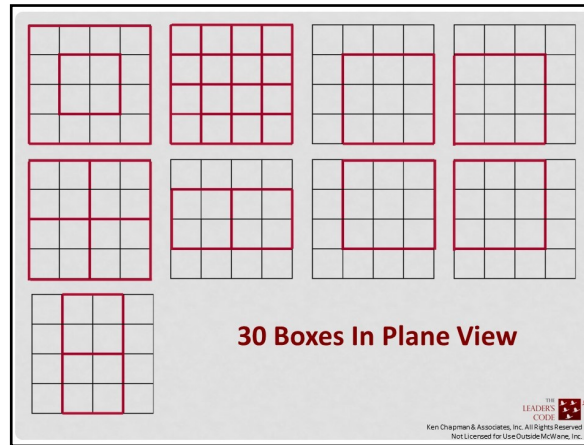
Look at this graphic:

How many boxes do you see? (Important to say “boxes” rather than “squares.”)

- As they call out responses, write them on the flipchart.

After several answers, say,

- Now let’s see how many there are. (click to next slide)



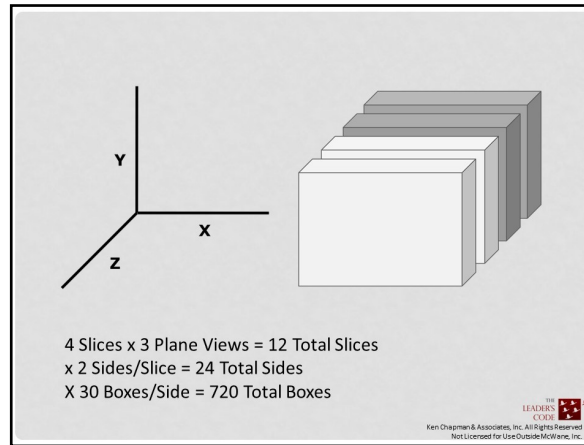
There are 30 boxes in plane view. You can look through these and see where they are.

So, there are 30 boxes, but is the person that guessed 16 (17, etc) wrong?

No, they were right, as far as they went.

*(Do this with a couple of their responses.)*

We could even take it a step further. Some of you may already be thinking that way because you picked up on the fact that this specifies “plane view”. Since I asked you about “boxes”, you could expand this to 3-D.



If you think of the image as a stack of boxes, there are 720 boxes in 3D. It all depends on where you let your mind go.

But even thinking of 720 boxes, is the person who said (16, 17, etc) wrong?  
No, they're correct, as far as they went.

But consider this: even if a first impression is correct, it isn't complete. There's always more to be known. The information (FACILITATOR) and I will be sharing might not seem to be beneficial at first sight, but we ask you to consider it. Think about it. Talk to your supervisor or other team members who have already been through the process or may be going through it now.



GET NOTECARD WITH TOTAL NUMBER OF YEARS' WORK EXPERIENCE ON IT

So, let's continue with some more suggestions for how to make the most of the time you're investing.

- “Ask questions” – This process is not a teacher-student relationship. It's a peer development process. Remember the card we asked you to complete earlier with your # of years of experience? There are (total years) years of experience in this room. *Hold up the card for them to see.* (FACILITATOR) and I aren't included in that total. If we tried to limit the knowledge in the room to what (FACILITATOR) and I know, we'd be missing out on (#) years of work experience. That's a lot of value you bring to the process, and we want you to contribute what you know. If I present something you agree with, let me know. If I present something that doesn't match your experience, let me know. Don't limit the knowledge in the room to what (FACILIATOR) and I have to say. If we do that, we'll be cheating ourselves. We can learn much from each other.
- “Take Notes” – You have a notebook in front of you that is yours. It's being provided so you can take notes. There are two primary parts to the process – 1) class sessions and 2) personal goal setting. You'll be asked to do some things outside of the sessions. But don't think of it as homework; they're opportunity assignments. Assignments to help you make the most of this opportunity. We'll say more about that at the end of the session today.
- “Relax and have fun” – A workplace where employees have a sense of humor is generally a more enjoyable place to be. When people enjoy each other, a 12-hour shift can seem like only 8 hours. But if it's all business – no humor with lots of negativity – a 12-hour shift can seem like 24 hours. (FACILITATOR) and I would much rather have fun while we're here. We hope you would, too.



## The McWane Location Team

The number one reason people come through the gate at McWane Location is for what their efforts will provide for the people they care about outside the gate.

- In your teams, discuss what this statement means to you.
- Assign a team member to report out.

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I want you to think about this statement. (*Read statement*)

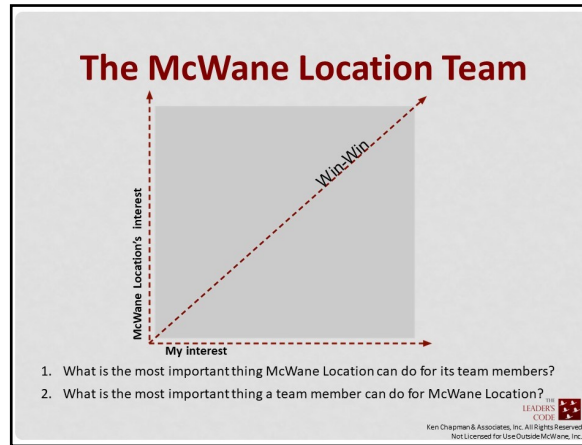
Do you agree? Do you disagree? Why?

We're going to take a few minutes to talk about this in teams.

- Identify teams – ideally groups of 3 or 4.
- Remind them to appoint a spokesperson for their team. They'll report from their tables.
- Put 2 minutes on Timer Tools. Do not hand out paper
- Applaud after each team shares.

### After they all share:

- I appreciate what you shared; it's certainly my experience.
- **Work is noble** because you are assuming full responsibility of yourself. (*The ability to take care of themselves and their families are usually the most popular answers.*)
- It is the same reason I come to work every day. It is a healthy self-interest.
- Work is how we express our sense of self-respect and self-confidence.
- Anyone who does honest work for honest pay earns the respect of those around them.



You've identified some of your interests; **why** you come to work at [YOUR COMPANY].

It probably doesn't surprise you to learn that [YOUR COMPANY] also has an interest. What do you think [YOUR COMPANY]'s interest is? (*Typical responses: make product, make profit*). You're exactly right. [YOUR COMPANY] wants to make a profit. But they have to balance that with your interest. If [YOUR COMPANY] only paid attention to making a profit, they could say they'll pay you \$2 an hour. They'd definitely make a profit then, right? So their interest is high on the graph. But where is your interest? It's super low. Would you continue to work for [YOUR COMPANY]? No, of course not. Without team members, [YOUR COMPANY] would go out of business. If we graphed it out, we'd see it crosses low on the win-win line.

But [YOUR COMPANY] can't focus only on your interest and lose sight of theirs. If they do this, say by paying each of you \$200 an hour, you'd be happy, but would [YOUR COMPANY] make a profit? No, and they'd eventually go out of business. Your interest is high on the graph, but theirs is low. It still crosses low on the Win-Win line and [YOUR COMPANY] would go out of business.

So I'd like for you to think about what the balance of [YOUR COMPANY]'s interest and your interest is. In your teams, consider these questions. Write down your responses and have a spokesperson ready to come to the front and report for your team.

- 2 minutes on Timer Tools. Give each team a piece of 11x17 paper with a line down the middle – "1" in the left box and "2" in the right.

#### **After they share:**

- 1. You've offered a lot of important things a company can do for its employees. Let me offer this. The most important thing a company can do for its employees is - Stay in business so they can issue paychecks.
- 2. You've offered a lot of important things an employee can do for the company. Let me offer this. The most important thing an employee can do for his/her company is - Help the company safely stay in business. Most or all of these things you've listed as the most important things a team member can do for [YOUR COMPANY] will help [YOUR COMPANY] stay in business.

**\*Take a picture of the lists to use in Session 3.**

## The McWane Location Team

- 50% of the general population do not think about where they've been, where they are, and where they're going.
- Two-thirds of the general population do not have real-time awareness of their emotions.
- Two-thirds believe they are good listeners, and two-thirds believe no one ever listens to them.

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We just talked through the value of a win-win for both team members and the company. Now we'll talk about how you get the greatest possible benefit from your life and work.

Let's take a look at some stumbling blocks that may trip people at times.

### Discussion for each statistic as you click and read it:

- **Think** – 50% of people simply do not take the time to consider how they got to where they are, and where they might be heading. They don't think about how past actions, experiences, and decisions have led them to where they are today, and they don't think about how their decisions and actions today will affect where they will be in the future. However, that means 50% of us do.
- **Emotions** – At any given time, 2 out of 3 people are unaware if they are mad, sad or happy in the moment. They don't realize the role their emotions play in what they do. They may get lost in their emotions and do or say things without thinking of the consequences. A good example of this is road rage. But, 1/3 of the population does have real-time emotional awareness.
- **Listening** – You might wonder how this math works out. It's like this: many people *think* they're good listeners because they are able to listen and learn what *they* need to know. But we only get credit for listening when we listen for what's important to the other person. 2 out of 3 people who think they are good listeners are only good at listening for what is important to them. But, 1 out of 3 people truly are good at listening for what the other person needs or is trying to say.

## The McWane Location Team

How does the following contribute to personal success and happiness?

1. Thinking about **where you want to go**
2. Being **aware of one's emotions** in real time
3. **Listening** for what is important to others

Select a team member to present your team's thoughts.

- 50% of the general population do not think about where they've been, where they are, and where they're going.
- Two-thirds of the general population do not have real-time awareness of their emotions.
- Two-thirds believe they are good listeners, and two-thirds believe no one ever listens to them.

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I'd like for you to think about each of these statistics from the standpoint of your personal success and happiness, and I'd like for you to discuss it in your teams.

I'll assign each team a different one to discuss. (If you have more than 3 breakout teams, assign one or more statements to more than one team. If you only have two teams, talk about #3 together as the whole team after they've reported numbers 1 and 2.)

Please write your thoughts on paper and appoint a spokesperson to come to the front and report for your team. I'll put 3 minutes on the timer.

- Set Timer Tools for 3 minutes and make sure each team has a piece of 11x17 paper

As the teams report, ask questions for clarification if needed, but since these are their opinions about their own personal success and happiness, you don't want to imply that they're wrong for thinking what they do.

## The McWane Location Team

Everybody wants their story to be a good story.

- Others help those who help them.
- People do not want to be impressed ... they want to be valued.
- People want to choose what is in their best interest.
- If you knew the story, you'd discover that most people have lived heroic lives.
- The people make a company an engine for good in the community.

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You've offered some great insights into your personal success and happiness. I'd like to share some additional thoughts about it.

Everyone wants to be the hero of their own story. Think of your life as a story you're writing. Maybe you write a chapter a day, or maybe even a chapter a year. Whatever the case, we want our story to be a good one. We want to believe we've done the right thing, worked to support ourselves and our families; that we're good people. We won't be perfect. In most stories, the hero faces difficulties, loses their way, or stumbles. But they learn a lesson, recover, and move on to succeed. We'll stumble, too. But our story can still be a good one and we can still be the hero of it.

- If you're willing to help a coworker/friend, then others are more willing to help you. Does that match your experience? Are you more willing to help someone who you know has helped you in the past?
- Another way to say this: people do not care what you know until they know you care.
- People have control of their own lives and want to choose what is in their best interest. We're adults, and we want to have a say in the decisions that affect our lives and livelihoods.
- Everyone has had some sort of adversity they have had to overcome and if we knew everyone's story, we would know how heroic other people are. We need to take the time to make connections and learn other's stories.
- Is it true that [YOUR COMPANY] does good things for the community? Let's take a look at this and discuss how the team members help make a company like [YOUR COMPANY] an engine for good in the community.

## The McWane Location Team

You and all other team members  
benefit from McWane Location. How?

Who else benefits from McWane Location?

***How does the community benefit from McWane  
Location?***

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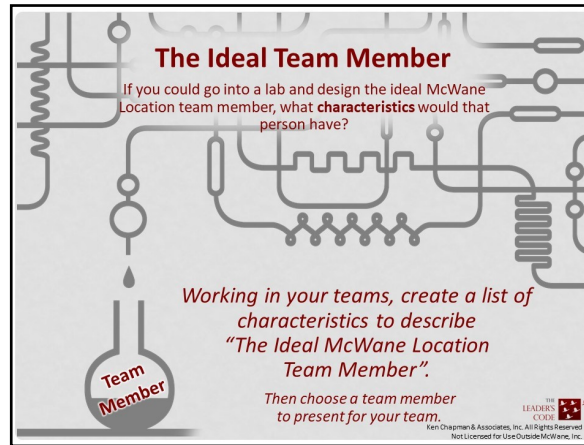
Do you agree that you and all other team members benefit from [YOUR COMPANY]?

How? *(Most common responses: paycheck & insurance/benefits)*

Who else benefits from [YOUR COMPANY]? *(Most common response: family. Usually if there has recently been some type of collection at the location for a team member or charity, the participants will mention that. Sometimes they get into taxes & supporting local businesses, charities, etc. If they don't, don't ask about them yet. Save that for the next question. If they do, go ahead and click on the last question.)*

How does the community benefit from [YOUR COMPANY]?

- Questions to ask to help guide discussion if needed:
  - Do you have taxes deducted from your paycheck? Do you think [YOUR COMPANY] also pays taxes to the community? What might those taxes fund? *(local schools, roads, services, etc.)*
  - What do you and the other team members do with your paychecks? *(spend them at businesses in town, donate to charities, etc.)*
  - Ask about charities your company supports and/or participates in *(United Way, river clean-ups, community sports teams, local celebrations/parades, etc.)*
  - Mention any local businesses your company supports *(local stores where boots/uniforms are purchased, etc.)*
- After discussion: That's what we mean by an ***engine for good***. Our community benefits because you spend your money here and support other businesses, your tax dollars provide services for all (roads, schools, etc.), charities are enriched by your contributions of time and money, etc.
- But here is something else: The American Water Works Association estimates over \$100 billion in property and 33,000 lives are saved each year because of fire hydrants. Your products contribute to the health and safety of people all over the country. You should feel proud to be a part of that.



CHECK THE TIME. IF YOU ARE ABOUT HALFWAY THROUGH THE SESSION, USE TIMER TOOLS TO GIVE THE PARTICIPANTS A 7 MINUTE BREAK.

If you gave a break here, thank the participants for returning on time.

Now we're going to take time to think about the Ideal Team Member. This is the team member you'd most like to have working beside you.

- Working in your teams, you'll have a whole piece of flipchart paper.
- Create a list of the characteristics that would describe your Ideal Team Member. You may want to think about a really good team member you either currently work with or have worked with in the past. What were the characteristics that made him or her great?
- You can list as many or characteristics as you'd like. I'll put 4 minutes on the timer.
- When you hear the chimes, have a spokesperson ready to present your team's list from the front of the room.

Go through each team's list. Ask for clarification for words whose intended meaning may not be clear.

- If a team has put more than one characteristic on the same line:
- Same/similar meaning – example: reliable/dependable – in these cases, encourage them to select the "best" characteristic, or ensure they actually see the words as having the same meaning – if not, separate them.
- Unrelated meanings – example: punctual/trustworthy – when there is seemingly no connection between two words, use your questions to help the team realize this fact and separate them.
- If a team has already explained a characteristic, simply ask the next team who uses that one, "were you thinking the same thing as Joe's team when you wrote "integrity"?"

This is their list, so do all you can to encourage them to make decisions. Do not talk them into or out of their opinions. Sometimes a team will insist that "punctual/trustworthy" are the same thing and should be lumped together. Simply move on.

After the last team has shared their list, say, You've provided us with 2/3/4 (however many teams you have) good lists, but we'd like to prioritize and narrow your list down to one list. We'll do this by voting with dots:

(Don't click yet. Details for this slide continue on the notes for the next slide)



### Ideal Team Member Characteristics

Rate your own performance on each characteristic as of today.

|          | 1    | 2 | 3 | 4 | 5         |
|----------|------|---|---|---|-----------|
| 1. _____ | Poor |   |   |   | Excellent |
| 2. _____ | Poor |   |   |   | Excellent |
| 3. _____ | Poor |   |   |   | Excellent |
| 4. _____ | Poor |   |   |   | Excellent |
| 5. _____ | Poor |   |   |   | Excellent |


  
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Hand out 3 dots to each teams.

- Tell them each whole dot is a one vote. They can't cut or tear their dots.
- All team members must agree on the characteristics they vote on.
- They can vote on 3 different characteristics, or they can put more than one dot next to a single characteristic.
- They can't vote on their own list. If one of their characteristics appears on another team's list, they can vote for it there. They just can't put a dot on their own piece of paper. *(Note: if you only have two teams, allow them to place one dot on their own list if they'd like to.)*
- Allow them to move to stand near the lists for a clear view if they need to. They may begin voting when their team has decided on their characteristics.

Counting votes:

- One facilitator will work with the teams and dots while the other will write down the top 5 (or 6) characteristics on flipchart paper in the front of the room.
- Start with a characteristic with two or three dots next to it. Count how many votes it has total (across all lists – have the participants help you find duplicate votes on different lists) and mark it off each list it appears on while the facilitator in the front of the room writes it on the final list. If different words receiving votes are deemed to be the same characteristic (for example, timely and punctual or dependable and reliable), ask the team which word they'd like to use on their final list.
- If you only have 3 or 4 on your final list and there are too many characteristics that received a vote to put all of them on the final list, circle those that have at least one vote. Offer a single dot to each team for a second vote (focusing only on the characteristics that are circled). They may vote on their own list for this round.
- Go through counting vote process again. Hopefully by this point you have 5, maybe 6, final characteristics on your master list.

The list written on flipchart paper at the front of the room will be the basis of the next exercise. **Click to slide above now.**

You've identified the characteristics that you feel a team member should have. If these are the things you want to see in the people working around you, what do you think your team members want to see in you? *(the same things!)*

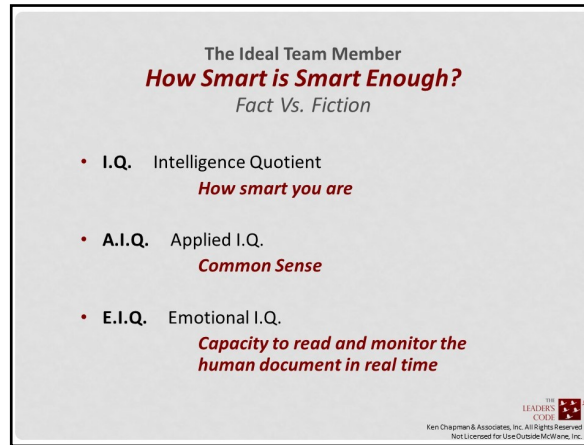
Hand out grey LDP cards and ask the team members to transfer the list as it appears on the flipchart paper to their grey card.

Ask them to rate their performance on the Ideal Team Member list. "If you feel you're really good at \_\_\_\_\_, then you might give yourself a 4-5. However, you may think you have some work to do on \_\_\_\_\_. If so, you may feel you're at a 2-3."

Specify that they will not be asked to turn their cards in or share their ratings with anyone. Their ratings form a baseline they can compare themselves to in 6, 9, 12 months.

Ask them to place their grey cards in the pocket of their notebook and tell them we will revisit their list at the end of the session.





If “smart” or “knowledgeable” made their final Ideal Team Member list or if it was on any individual team’s list, your transition to this discussion is pretty straightforward. Simply point it out and then ask, “but how smart is smart enough?” How do we measure being smart? If it didn’t make a final list, state that it often does (which is true).

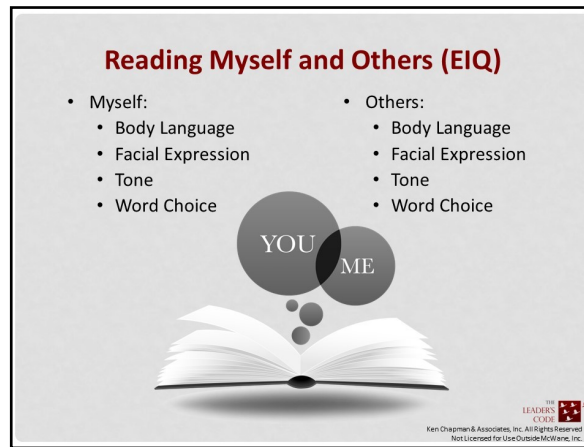
We think of intelligence as being measured by our IQ, or our Intelligence Quotient. That’s simply a numeric measure of how smart you are.

- It was once thought that our IQ was set from birth. We were born with an IQ and we either won the genetic lottery or not.
- We now know that our IQ is dynamic; always going up or down. It can be raised into your 70’s. In the course of a career, if you get up daily and work at a job, meet responsibilities, solve problems, etc., you’ll raise your IQ. Over a 40-year career, IQ can rise 20%.
- The opposite is true as well. The more you use your brain the stronger it becomes. It’s more like a muscle than you might imagine. But what happens to a muscle if you stop using it? (*you lose strength*) Have any of you ever broken a bone and had to have it in a cast? What was it like when you had your cast removed after several weeks of not using it at all? (*it was skinny/withered and weak*) The same is true for your intelligence. If you don’t use it, it weakens.
- It’s a myth you must be brilliant to be successful. Another myth is that education and intelligence are the same. They’re related, but not the same. If you have 10 people, 9 PhD’s and 1 person without formal education, the person without formal education could have the highest IQ. You don’t have to be a genius to be successful, you just have to be smart enough.
- The workplace is a great university, with unlimited opportunities to learn, if you choose to take advantage of it. Everyone in this room is easily smart enough to earn a PhD in experience.

We now know that our IQ is 3 dimensional. There are other aspects of our intelligence.

**AIQ:** Applied IQ is common sense. It’s how we use our intelligence. You can have a high level of IQ, but a relatively low level of AIQ. (Provide a personal example if you have one. One example: smart person asking as they get out of the car in a crowded area if you’re going to lock the car because they’re planning to leave their wallet/purse in it)

**EIQ:** Emotional IQ: the “Human Document” is me. It’s also you. Someone with a strong EIQ can read themselves and others in real time. Let’s take a look at what I mean by “reading and monitoring other people and ourselves.”

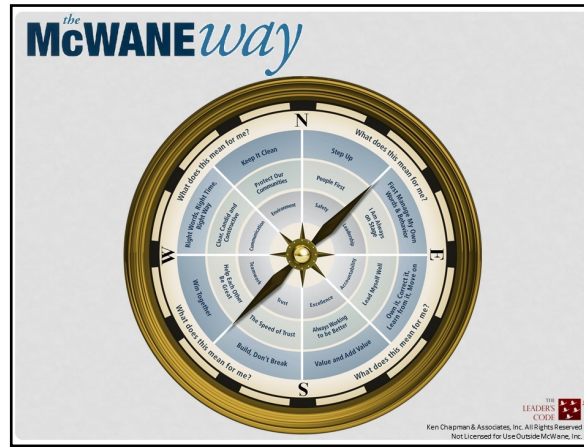


My EIQ is the how aware I am of my own emotions, body language, facial expression, tone and word choice, as well as my awareness of the same in other people.

This is what it includes:

- Body language:
  - What are examples of body language? *(Answers may include crossing arms, clinched fists, defensive posture, etc.)*
  - Crossing arms example:
    - If we asked 100 people at *(name a local mall, park, etc.)* 'What does it mean when others cross their arms,' what answers would we get? *(defensive, closed off, etc. – almost always something negative)*
    - Now, if we waited and asked the next 100 people, 'What does it mean when YOU cross your arms,' what answers would you get? *(I'm cold, it's comfortable, etc. – almost always something neutral)*
    - Point out how crossing arms rests the large muscles in your neck and shoulders. It's true that it's comfortable.
- Facial Expression
  - They may mention some of this as examples of Body Language. If so, go ahead and click for Facial Expression to come on the screen and continue with the Body Language discussion.
  - What are examples of facial expression? *(frown, eye roll, eye contact, etc.)*
- Tone
  - What are examples of tone? *(cheery, grouchy, sarcastic, etc.)*
- Word Choice
  - What are examples of word choice? *(Please/thank you/you're welcome, cursing, etc.)*

Being aware of my own body language, facial expressions, tone, and words and the message they're sending to others is a huge part of EIQ. Also, being able to read these same things in others. Based on *Joe's* body language, facial expression, tone, and word choice, I might decide now is not the right time to have the conversation I need to have with him. I'll wait until tomorrow. Typically, the better we know someone, the more accurate our reading, but if I have a strong EIQ then I can get the basics even if I've just met you.



Let's turn back to our Compass. We'll focus on one Compass Point in each of our eight sessions. Our conversation today has been leading us to the 1<sup>st</sup> Compass point: [CLICK TO LEADERSHIP](#).



## Leadership.

- You may be wondering why we're talking about leadership. Maybe you've never held a leadership position in this company. Leadership doesn't mean you have a title after your name or have people reporting to you. If you've earned the trust and respect of any of your fellow team members and others around you, then you're a leader. People will listen to what you have to say.
- This is what we mean by the value, "I Am Always on Stage." If others trust you and respect you, they'll look to you as an example for what they should do and how they should handle themselves if and when they find themselves in the same situation.

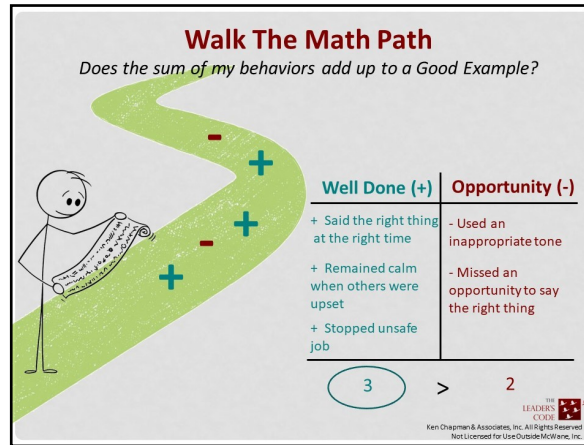
**The Rationale for . . .**  
*First Manage My Own Words and Behavior*

- Assumes control of the one thing I can always control – myself.
- Grants me moral authority – I am already doing what I ask you to do.
- Maximizes the trust and respect I have earned.
- Walk the “Math Path”

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So why is “first manage my own words and behavior” the behavioral principle for the Leadership Compass Point? There are several reasons:

- “It assumes control...”: There are X number of people in this room. How many can I control? Only one, and only then if I choose to control me. I can’t control much of what goes on around me, but if I choose to, I can control how I react and respond to it. And if I’m thinking about being a good example, my best argument for how others should behave is how I manage me.
- “Grants me moral authority...”: By moral authority, I’m not talking about right or wrong or how you live your life away from work. What I mean is, I am already doing what I am asking you to do. If I expect one thing from you, yet I’m doing the opposite, what does that say to another adult? “Do as I say, not as I do” and “Because I said so” don’t work well for children, and they don’t work at all for adults.
- “Maximizes the trust and respect...”: If I’ve earned the trust and respect of the people around me then they’re watching me to see how I handle myself. We don’t get credit for behaving well when everything’s going well. People pay most attention when things are not going well for us; when we’ve hit a difficult time or when we don’t get what we want.
- Walk the Math Path: let’s look at this one more closely. (click to next slide)



We know we're humans, and that means we're not perfect...we're going to make mistakes. But am I making a good-faith effort to lead myself well on a daily basis?

The idea of "The Math Path" comes from Ben Franklin, one of our Founding Fathers – you've probably heard of him. Ben Franklin kept a journal that looked something like this. He would reflect on his day and think about what he did well and what he could improve on. He recorded these events on a ledger. On one side, Franklin wrote the things he did well, while on the other side, he wrote what he could've done better. If there was more good than bad, he'd consider it a good day.

- Yours might look something like this: (click through and read the chart)
- When you "do the math" does it add up? If your good efforts outnumber your opportunities, then it's a good day.
- When I add up my behavior at the end of the day, will it take me on the path to reach the desired goal or objective?

We are not looking for perfection, we are looking for a good outcome.

It is direction, not intent, that determines destination. Since that is the case, does my behavior lead me to the destination I want? Does my behavior at [YOUR COMPANY] help lead my team to the destination we want?

## Opportunity Assignment

*To Prepare for the Next Session:*

**Assignment:**

- Leadership Development Plan**  
*How can I do a better job of being an Ideal Team Member?*
- Read: *The Leader's Code***  
Chapters 1, 2, & 3
- Today's Story**  
*What is a life or leadership lesson?*



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As we go through your opportunity assignments, please write them down in your notebook so you can refer back to it and be prepared for the next time we come together.

Our next session will be (DATE). Write this down. Please don't depend on your supervisor to remind you.

Your leadership development plan is your opportunity to focus on today's compass point and how you can use what you've heard today to be the kind of team member you want to work with.

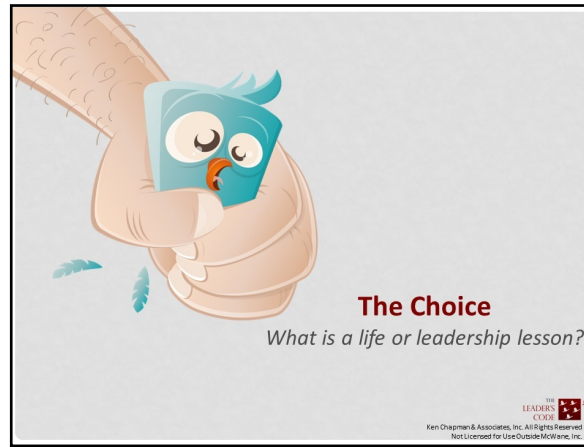
You should complete your LDP before you come to the next session. You'll be asked to share your goal out loud.

You already have your grey card from the "Ideal Team Member" exercise we did earlier in the session. If you'll turn it over to the back, you'll see that you have a question to focus your LDP. "How can I do a better job of being an ideal team member?" Look at the characteristics that your team values in a team member. Is there one of those that represents an opportunity for you to improve? If so, write it down and write how you can work on that.

To prepare for each session, you'll be asked to read from the book ***The Leader's Code***. For Session Two, you need to read Chapters 1, 2, and 3. This is the longest reading assignment you'll have. For each of the remaining sessions you'll only be asked to read one chapter. This time you're reading about what we discussed today as well as preparing for Session 2. (FACILITATOR) is giving you a copy now. This is your book to keep. Please feel free to take notes in it or write down questions that you may have as you're reading.

Are there any questions?

If not, we always end our conversations with a story.



*Contact your client manager if you're interested in a video version of "The Choice."*

I'll tell you the story in a moment, but as I tell the story, think about a life lesson or leadership lesson you can take away from the story. There's not just one – it's whatever you take away from the story. When we get together for Session 2, we'll ask you to discuss the story in teams and then tell us about the life lesson or leadership lesson your team took away from the story.

Once upon a time, there was a wise man who lived in a small village. Even though he did not think of himself as a wise man, his neighbors considered him to be a wise man because when they went to him for advice, he gave them very good advice.

Living in this same village was a young man who was rather sure the wise man was not so wise at all. Not only did he think the wise man was not wise, but he felt it was his responsibility to show everyone just how foolish the old man really was.

The young man thought about the old man for a few days and hatched a plan. "I'll catch a bird," the young man said to himself. Then I'll go to the wise man when he's giving advice in the public square. I'll hold the live bird cupped between my hands and ask him, 'Oh wise one, tell me, is the bird I hold between my hands alive or is it dead?' If he says the bird is alive, I'll crush it and show him a dead bird. If, on the other hand, he says the bird is dead, I'll open my hands and let the bird fly away. So no matter how the old man responds, he'll be wrong, and everyone will see just how foolish the old guy really is."

True to his plan, the young man waited until a Saturday afternoon when the wise man was in the public square giving advice. When the young man was satisfied the crowd was at its peak, he approached the wise man and made a big production asking him, "Oh, wise one, is this bird I hold between my hands alive or is it dead?"

The wise man looked the young man over carefully and considered the question. After a moment of silence, the wise man positioned himself so he could look the young man level in the eye. Then, placing his hand atop the cupped hands of the young man, the wise man responded to the question – Is the bird dead or alive?

"It is up to you," said the wise man. "It is your choice."

When we come back together on (DATE), we'll get in our teams and discuss a life or leadership lesson we can take away from the story of The Choice; what is a moral of the story?

Thank you for spending time with us today. Have a great day/week/weekend, and be safe.

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