FACILITATED **SOLUTIONS**

Mediators & Conflict Management Specialists

Prevent | Manage | Resolve

Free Facilitation Fridays

Establishing Clarity in Uncertain Times

Applying Pat Lencioni's ideas at work and at home

David Falk & Sandy Koop Harder
Starting at 10:30 am

1

FACILITATED **SOLUTIONS**

Mediators & Conflict Management Specialists

Prevent | Manage | Resolve

www.workplaceconflict.ca

2

FACILITATED SOLUTIONS

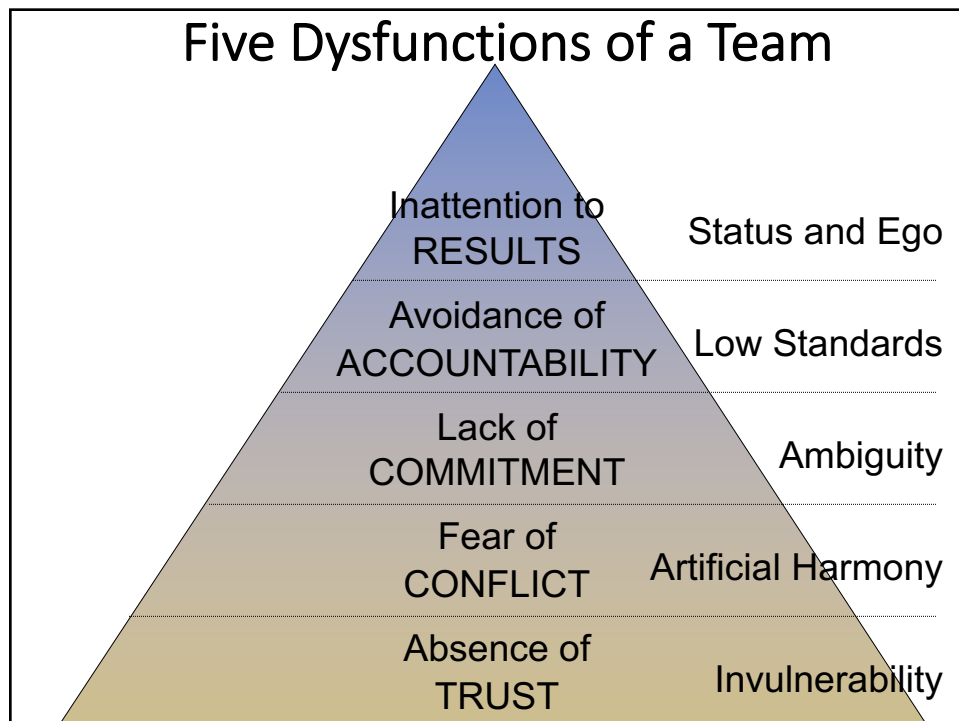## Mediators & Conflict Management Specialists

www.familyconflict.ca

3

Organizational Health

ORGANIZATIONAL HEALTH

BUILD A COHESIVE LEADERSHIP TEAM

CREATE CLARITY

OVER-COMMUNICATE CLARITY

REINFORCE CLARITY

4

Smart vs Healthy

SMART	HEALTHY
• Good decision sciences	• Good people sciences
• Strategy	• Minimal Politics
• Marketing	• Minimal Confusion
• Finance	• High Morale
• Technology	• High Productivity
	• Low Turnover amongst good employees

5

Five Dysfunctions of a Team

Inattention to RESULTS	Status and Ego
Avoidance of ACCOUNTABILITY	Low Standards
Lack of COMMITMENT	Ambiguity
Fear of CONFLICT	Artificial Harmony
Absence of TRUST	Invulnerability

6

Build a Cohesive Team

- Being open and building trust
- Engaging in constructive ideological conflict
- Committing to clear decisions
- Holding one another accountable for behvaiours and performance
- Focusing on collective results

7

8

Create Clarity

- Why do we exist?
- How do we behave?
- What do we do?
- How will we succeed?
- What is most important right now?
- Who must do what?

9

INSTRUCTIONS: THEMATIC GOAL EXERCISE

1. Ask every member of the team to individually answer this question: "If we accomplish one thing during the next x months, what would it be?" Share and debate answers. The goal should be to rally the troops, but more than anything else, it should give the leadership team clarity where to spend its time, energy and resources. Leadership team members may need to temporarily abandon their departmental objectives for the good of the organization as a whole. To help determine the thematic goal, consider these facilitation suggestions:

   - ❑ Have every team member write down their answer.
   - ❑ Estimate time frame (between 6-9 months).
   - ❑ Consider this supplemental statement: "If we do not accomplish _____, we have failed."
   - ❑ If there is push-back over the need for only one goal, recite the adage, *"If everything is important than nothing is."*
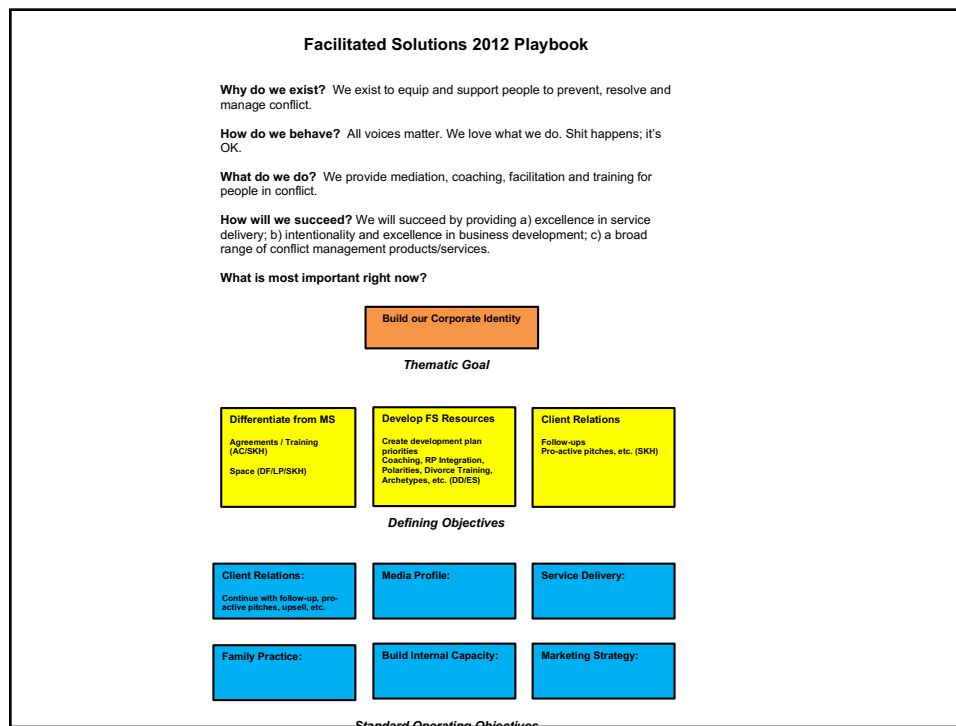
2. Once everyone has committed to answer, white board the team's answers. Facilitation tips:

   - ❑ Encourage everyone not to hold back; ask the leader to go last.
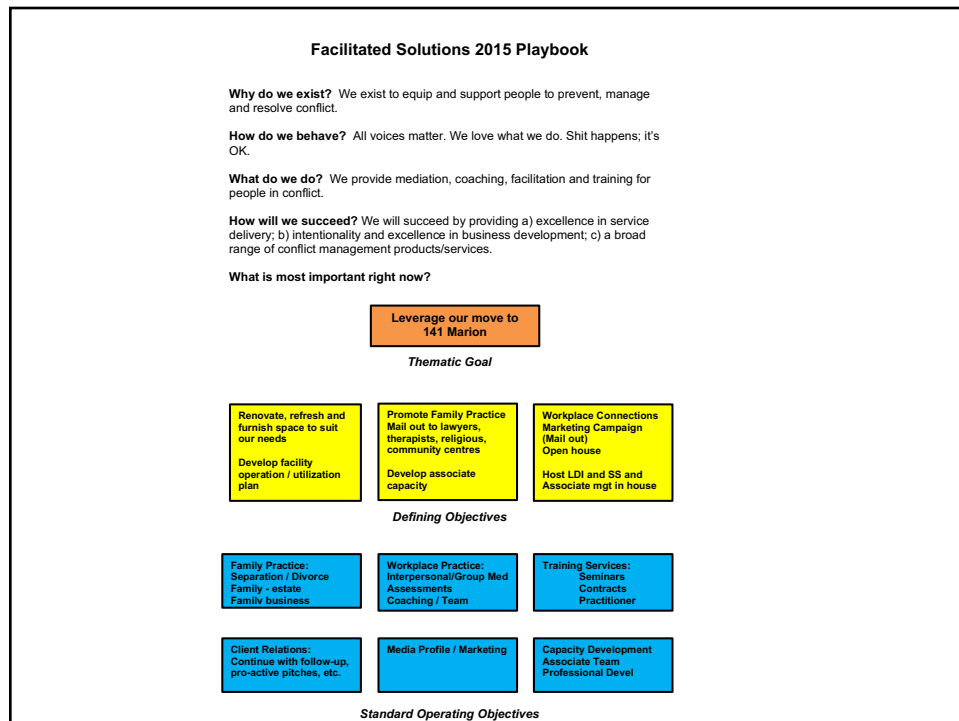   - ❑ Write down all goals and any needed clarifying statements.

10

3. Discuss the list and determine if some of the answers might actually be a standard operating objective. To determine this distinction, consider the following ideas:

❏ Ask the questions: *"Is this something that is always important?" "When are we not worried about that?" "How is that different from last period, or next period or next year?"*

❏ Remind the team that a thematic goal is only for a specific period of time, and then it goes away. If something is always important, it is more likely than not a standard operating objective.

4. Ask the team to review the newly sorted list to identify which goal rises to the top as the most important.

5. If there are discrepancies, ask team members to take 60 seconds to convince the team why their suggested goal is most important. Consider all suggestions.

6. Team must then put a stake in the ground to select the thematic goal.

7. Review the list of suggestions; many of these activities/concepts will likely populate the defining objectives and standard operating objectives.

8. Continue the discussion until you have 4-6 defining objectives (activities/components that define the goal) and outline several of your team's standard operating objectives (areas of focus that don't change from period to period).

11

Facilitated Solutions 2012 Playbook

Why do we exist? We exist to equip and support people to prevent, resolve and manage conflict.

How do we behave? All voices matter. We love what we do. Shit happens; it's OK.

What do we do? We provide mediation, coaching, facilitation and training for people in conflict.

How will we succeed? We will succeed by providing a) excellence in service delivery; b) intentionality and excellence in business development; c) a broad range of conflict management products/services.

What is most important right now?

> **Build our Corporate Identity**
>
> *Thematic Goal*

Differentiate from MS Agreements / Training (AC/SKH) Space (DF/LP/SKH)	**Develop FS Resources** Create development plan priorities Coaching, RP Integration, Polarities, Divorce Training, Archetypes, etc. (DD/ES)	**Client Relations** Follow-ups Pro-active pitches, etc. (SKH)

Defining Objectives

Client Relations: Continue with follow-up, pro-active pitches, upsell, etc.	**Media Profile:**	**Service Delivery:**
Family Practice:	**Build Internal Capacity:**	**Marketing Strategy:**

Standard Operating Objectives

12

Facilitated Solutions 2015 Playbook

Why do we exist? We exist to equip and support people to prevent, manage and resolve conflict.

How do we behave? All voices matter. We love what we do. Shit happens; it's OK.

What do we do? We provide mediation, coaching, facilitation and training for people in conflict.

How will we succeed? We will succeed by providing a) excellence in service delivery; b) intentionality and excellence in business development; c) a broad range of conflict management products/services.

What is most important right now?

> **Leverage our move to 141 Marion**

Thematic Goal

Renovate, refresh and furnish space to suit our needs Develop facility operation / utilization plan	Promote Family Practice Mail out to lawyers, therapists, religious, community centres Develop associate capacity	Workplace Connections Marketing Campaign (Mail out) Open house Host LDI and SS and Associate mgt in house

Defining Objectives

Family Practice: Separation / Divorce Family - estate Family business	Workplace Practice: Interpersonal/Group Med Assessments Coaching / Team	Training Services: Seminars Contracts Practitioner
Client Relations: Continue with follow-up, pro-active pitches, etc.	Media Profile / Marketing	Capacity Development Associate Team Professional Devel

Standard Operating Objectives

13

THE MEETING ADVANTAGE
A TOOL FOR REINFORCING ORGANIZATIONAL HEALTH

Facilitated Solutions
FACILITATED SOLUTIONS

< APRIL 2, 2020 >

LIGHTNING ROUND (report)

ORGANIZATIONAL CLARITY (review)

1 WHY DO WE EXIST? We inspire, equip and help people prevent manage and resolve conflict

2 HOW DO WE BEHAVE?
- All voices matter
- We love what we do
- Shit happens, it's ok

3 WHAT DO WE DO? Provide mediation, coaching, and facilitation services for people in conflict and training and development to help equip people to address conflict

4 HOW WILL WE SUCCEED?
- excellence in facilitation
- intentionality and excellence in business development
- offering a broad range of conflict management products and services

14

WHAT IS MOST IMPORTANT RIGHT NOW? *(review and assess)*

OUR THEMATIC GOAL ✓

To survive and thrive

OUR DEFINING OBJECTIVES:

Become trustworthy with online service delivery	Stabilize our finances	Serve (support) our existing clients through this season	Lemonade: Leverage this opportunity	Give away - serve - our community (be generous)

OUR STANDARD OPERATING OBJECTIVES:

Family Practice	Workplace Practice	Training & Speaking	Client Relations	Internal Capacity	Marketing	Finance / Legal	Facilities

WHITEBOARD ⓘ

15

Over Communicate Clarity

- Repetition
- Simplicity
- Multiple mediums
- Cascading messages

16

Reinforce Clarity

- Hiring
- Managing performance
- Rewards and recognition
- Employee dismissal
- Meetings

17
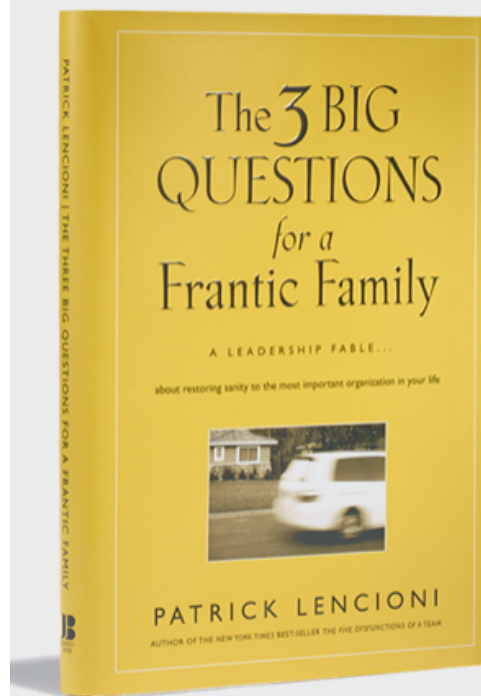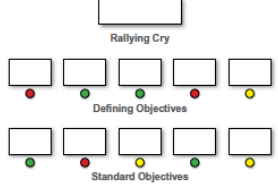
18

The Three Big Questions
Family Scoreboard Explanations

The 3 BIG QUESTIONS for a Frantic Family
PATRICK LENCIONI

1. What makes your family unique?
The answer to this question should be two or three sentences that describe how your family is different from any other family in the world. If you don't know what differentiates your family from others, you won't have a basis for making decisions, and you'll try to be all things to all people.

2. What is your top priority—rallying cry—right now?
Rallying Cry: The rallying cry is a single, agreed-upon top priority for your family over the next two to six months. Without a top priority, everything becomes important and you end up reacting to whatever issues seem urgent that day.

Defining Objectives: Defining objectives are the basic categories of things you'll have to do to achieve your rallying cry. Without identifying those categories, you'll be left with nothing but a general statement—and no context for getting it done.

Standard Objectives: Standard objectives are simply those regular, perennial responsibilities that a family must pay attention to in order to keep its head above water. By acknowledging these ongoing responsibilities, families will avoid being distracted from what really matters.

3. How do you talk about and use the answers to these questions?
The most important thing a family has to do to keep its context alive is discuss it in regular meetings. If you answer the first two questions but don't use those answers in daily, weekly and monthly decision-making, it will yield limited benefits. It can also be helpful to "score" your progress as demonstrated with the green, yellow, and red color key.

Rallying Cry

Defining Objectives

Standard Objectives

Color Key
Red: Needs attention
Yellow: On the right track, but still needs some work
Green: Ahead of schedule or already finished

mple wisdom for organizations. www.thefranticfamily.com

the table group
a patrick lencioni company

19

Our Family Scoreboard

1. What makes our family unique?
_____
_____

2. What is our top priority—rallying cry—right now?

Rallying Cry

Defining Objectives

Standard Objectives

3. How will we talk about and use the answers to these questions?
_____
_____

Simple wisdom for organizations. www.thefranticfamily.com

the table group
a patrick lencioni company

20

Great Team Behaviours

Adapted from Patrick Lencioni

Level	Behaviour
RESULTS	Focus on purpose & priority
ACCOUNTABILITY	Engage - follow up
COMMITMENT	Clarify expectations
CONFLICT	Mine for conflict
TRUST	Go first

21

Pat Lencioni
The Table Group

The Motive
New!

The Advantage
$27.95
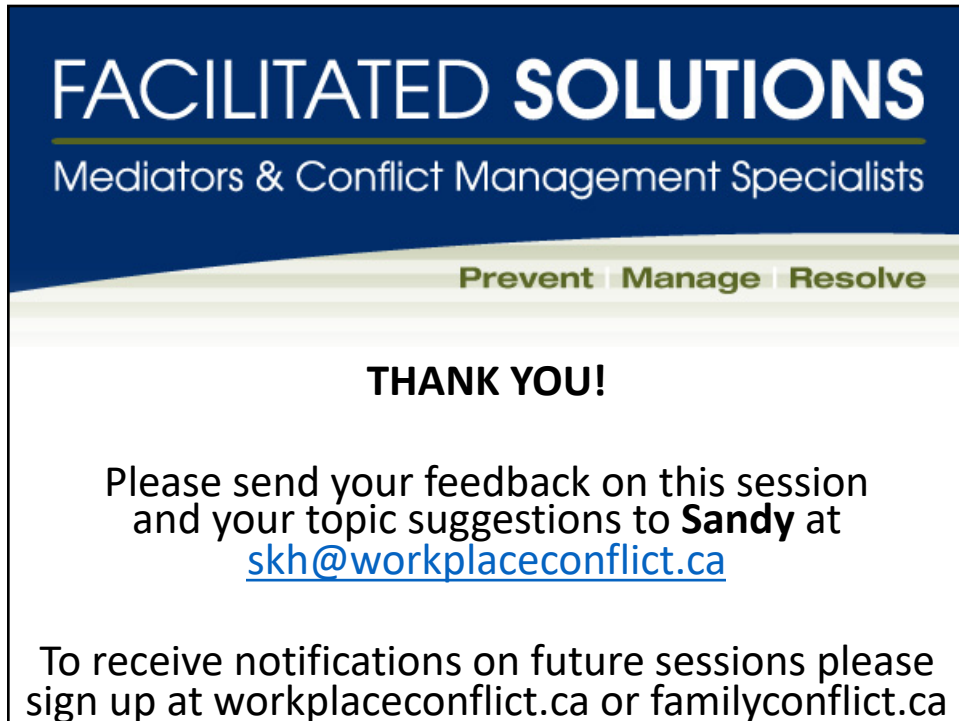
The Five Dysfunctions of a Team
$24.95

The Ideal Team Player
$25.00

www.tablegroup.com

22

/20

THANK YOU!

Please send your feedback on this session and your topic suggestions to **Sandy** at
skh@workplaceconflict.ca

To receive notifications on future sessions please sign up at workplaceconflict.ca or familyconflict.ca

23

Thanks for joining us for our second
FREE FACILITATION FRIDAY

Next Week May 1st
Embracing Discomfort
A Key to Difficult Conversation

Resources from todays session will be posted on our website
workplaceconflict.ca

24

12