

# Clear Direction

## *Team Directory*

Patent No 6,618,723 B1

Sample Manager

Sample Team

June 2, 2009

v1.1.15



*Dear Sample,*

*Self-understanding is the key to success in today's world, and successful leaders know that one of the most common reasons why employees stay or leave their positions is their relationship with the person to whom they report. Armed with this Team Directory, you will learn how to interact and communicate with each of your team members based upon their unique motivations. This will enable you to improve employee retention, increase team morale, and build effective long-term relationships with your team members.*

*Our clients use their Team Directories every day to direct them concerning important distinctions about their team. They have found that it increases their effectiveness with their direct reports, peers and the individual to whom they report. We are certain that you will find your Team Directory to be informative and helpful as you strive to successfully manage and direct your team.*

*One secret to being effective with your team is understanding the specific things that motivate each member as well as those things that frustrate or anger them. This product was developed to provide you with summaries of each of your team member's internal motivations. Effective managers have the ability to honor the uniqueness of each person in light of the tasks that must be accomplished. Ineffective or immature managers either treat everyone the same way or they expect their direct reports to adapt to the manager's "personality." Your Team Directory is your key to achieving ultimate success as a team leader.*

*The information in your Clear Direction Team Directory is based upon the science of axiology and the highly respected Kinsel-Hartman Profile. From the prioritized rankings that you and your team members assigned on your Profiles, we are able to provide you with detailed information on the make up of your team.*

*Each section of your Team Directory will be introduced and explained on the following pages. Set aside ten minutes to familiarize yourself with the contents of this book. As you interact with your team, refer to your Team Directory for tips on how to communicate and work with each individual. Make this book yours by underlining, highlighting, and writing notes on each page. Use your Team Directory as a tool for your team's growth, increased success, and clear direction.*

A handwritten signature in black ink that reads "Dr. Bob Smith". The signature is written in a cursive, flowing style.

*Dr. Robert Kinsel Smith  
Clear Direction, Inc.*

# Table of Contents

## Your Team of Direct Reports

<b>Your Team's Thinking Alike Index</b> How alike are your direct reports in how they think about things?	Page 1
<b>Your Team's Thinking Breadth Index</b> Are many different thinking orientations represented on your team?	Page 2
<b>Your Management Demands</b> In light of these indices, how do I best manage my team?	Page 2
<b>Important Conversations - Helping You Prepare</b> Helps for you to prepare to have important conversations with others.	Page 3

## Team Member Pages

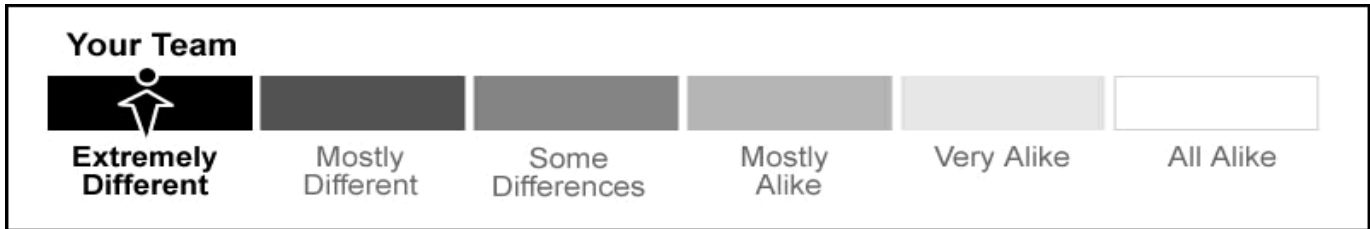
<b>About Each of Your Direct Reports</b> Motivations, Reminders, In Light of You, and Communications Helps.	Page 4
<b>Your Peers</b> Helpful input to develop and maintain the respect of your peers.	Page 17
<b>The Person to Whom You Report</b> Understanding your boss's frame of reference and how it impacts you.	Page 21

## Appendix

<b>Motivations</b> Explanations of the different sources of motivation and tips on how to manage each of your team members.	Page 23
<b>Reminders</b> Explanations of characteristics of your direct reports.	Page 27
<b>Index</b>	Page 31

# Thinking Diversity Indices

## Your Team's Thinking A likeness Index



Your team's thinking alikeness is extremely different. Approximately 10% of your team has generally the same thinking orientations and therefore most of the individual summaries contained in this directory will be different. This leads your team to see things and approach things in different ways. This means that the likelihood of the team falling into "group-think" and having the same orientation is very low.

When a large percentage of people think in the same ways about things, they tend to align and expect the procedures that work for their thinking orientations to be followed, and they make decisions in the same manners. In your team's case, their effective working with each other will depend on:

1. Reasonable levels of self honesty – so they are honest about their own strengths and limitations.
2. Their ability to genuinely value people who bring different orientations, strengths, and perspectives to meetings, tasks, and to the team.

Be aware that your team's absence of alikeness can make the team vulnerable to reaching conclusions that actually are not agreed upon. With these kinds of differences alternative ways of reaching conclusions always exist. Those who are more impatient or reach conclusions quickly will tend to disregard or dismiss what the other team members need in order to reach conclusions.

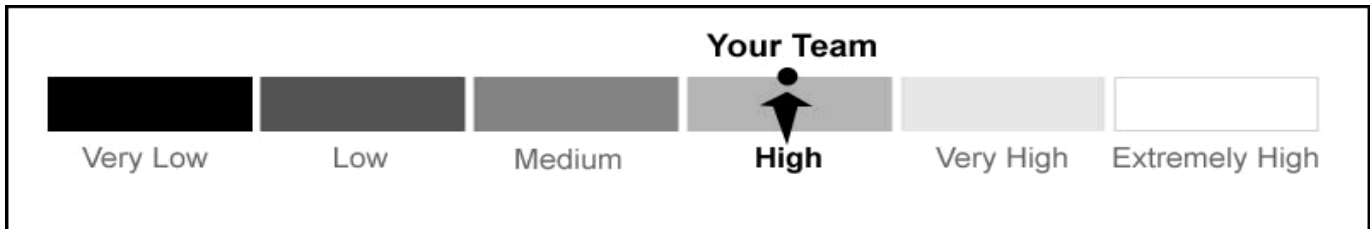
### Benefits of Being Extremely Different

- The majority of your team looks at things differently and assesses them in different ways, leading to a healthy breadth of perspective and attention to all issues.
- Diversity that is well-managed brings significant benefits because of the absence of overlap and redundancy.

### Liabilities of Being Extremely Different

- The team dynamics will need to be monitored on a very regular basis.
- Differences in thinking lead to stress, so the team has a potential for high stress.

## Your Team's Thinking Breadth Index



Your team's thinking breadth is high. This indicates that the spectrum of differing viewpoints and opinions is broadly covered. You may or may not have a lot of people differing with each other (this is addressed in the Thinking A likeness Index), but you do have a significant level of difference represented by the team (so maybe only one or two are different, but they are very different). Your team has 75% of all general viewpoints available to it. This means that you have the resources within your team to:

1. Understand most of the dimensions of value and therefore use all of the tools necessary for success.
2. Look for and value most of the categories necessary for success.
3. Have some members appear to be totally off the wall in their approach, in their perspectives, and in their conclusions.

### Benefits of Having High Breadth

- Your team is fairly well equipped to be naturally attentive to the factors important for success.

### Liabilities of Having High Breadth

- Diversity causes stress and your team has high levels of diversity (different ways of seeing things and making decisions). This diversity must be managed in order for you to benefit and yet you will also need to know specifically how your team is vulnerable to "group think" and thereby miss what is necessary for success.

## Your Management Demands Are Very High

Sample, you must work at listening to each person's position in order to be effective from their perspectives.

Secondly, each team member needs to give extra time and energy to hearing one another carefully, and not shortening dialogue believing that you know what the other people are saying. Your team's breadth is so high that misinterpretation and misunderstanding is likely to be common. This will especially be true with highly intelligent teams, in times of high stress, or with high work demands.

Time, energy and commitment to working things through are critical for this team to maximize it resources for the benefit of the whole. Stress, fatigue, and poor self-care can be enemies of this team.

# Important Conversations

## Examples of Important Conversations

Formal performance reviews, a review of a project upon completion, when the person is doing something that is detrimental, when you have been asked directly for your opinion, when your words could cause pain or be demotivating, when you have been accused of something that is awkward for the other person, when you have to address mistakes another person has made, when facing a situation that can have very serious ramifications, when the person you are talking with is very sensitive or defensive, when the person is very valuable to the company and does not feel appreciated, when something is very important to the other person and not very important to you, or when you are under a lot of stress and have very little energy to deal with anything else.

The most common mistakes concerning important conversations are that they are delayed or fumbled.

### **Delaying means:**

The situation was not addressed when it was first made known

Other problems have occurred because the matter was not addressed more quickly

The importance of the message is diluted from of the passage of time

### **Fumbling includes:**

Talking at the listener resulting in understanding never being reached

Communicating in a way that the listener walks away confused about the message

The listener sabotages the message by defensiveness, blaming or reasons

## Things for you, Sample, to consider (based on your own profile scores)

You will tend to be a manager who does not feel that it is good to impose systems or rules on individuals. But if the problem has resulted from the person violating rules, agreements or plans, then make sure you uphold the appropriate expectations and then have to hold this person accountable to what is expected.

You underestimate the impact that your presence, abilities, energy, and initiative have on other people. It is your place to encourage, direct and stimulate your direct reports to perform to higher levels of accomplishment. What you do and what you say does make a difference - so be part of the solution, realizing that you have more ability to influence others than you are naturally inclined to realize (or even want).

## More Information

For more information about particular kinds of important conversations or communicating effectively with people who differ from you, go to [www.ClearDirection.com](http://www.ClearDirection.com), enter your ID (SAMMAN881) and Password (2ERN9N28) and click on the word 'Helps'.

# Amy (Direct Report)

## Motivations

Team, right/wrong, reasons, mission, esprit de corps, predictability, and everything must be fair, logical, and planned out (especially salaries, opportunities, and benefits). (M2)

Be sure to: Give her clearly stated expectations for her and the team's success.

Set aside time to hear her views on things that are not immediately pressing.

Conceptual problem solver, likes to figure out conceptual solutions. (M9)

Be sure to: Give her problems to solve that require thinking things through before acting.

Give her a heads up to anticipate changes in plans, requirements, or expectations.

## Reminders

You must provide direction and a clear detailed job description and expectations to Amy. (R1)

Deeply feels embarrassment, rejection, or failure and will tend to not pay attention to her need for personal development or growth. Take the initiative and get her into training and development courses.

Be sure to support Amy, come alongside her, and oversee her development and professional growth. (R4)

Will not be proficient at self-promoting or protecting when in the midst of politically charged environments. Amy needs you to protect or promote her within the organization. (R8)

Before you impose your or the company's will – ask Amy for her advice. (R9)

When frustrated with what she is doing, remember that in most cases being subtle does not work. While it may seem harsh, either putting things in writing or communicating bluntly (in a one-on-one session) will often be the only way to communicate effectively with Amy. (R15)

Amy is affected significantly by stress, so be careful to protect her from attacks, uncertainty, and political infighting. You will need to provide clear expectations, means to accomplish the goals, and support to her. (R16)

## In Light of You

You are a lot more attentive and aware of political and practical dynamics, and therefore Amy may see you as too political or not trustworthy because you appear to be too "manipulative" or politically motivated. Review with her why you take the approaches that you take, the importance of winning others, and what is needed to get results. It will be helpful for her to hear you talk through your practical, common sense reasoning, which she will not readily see.

You have more personal courage than Amy, and therefore you may be inclined to not respect Amy's sensitivity or need for approval from others. Use your confidence and courage to lead her to develop her confidence.

You are more self-directing and have a higher internal need to achieve than Amy has for herself. This can cause you to feel she is less ambitious and therefore less loyal to the company. It can cause Amy to see you as excessively driven, insistent, or stubborn. Be careful that you do not miss the value of people like

this just because it appears they do not have your drive or dedication – they still can be very valuable and competent.

You will need to protect Amy from her inability or unwillingness to self-promote or contend effectively in a political context because of your greater ability to do this for Amy than she can do it for herself.

Amy needs you to provide a clear mission and expectations in order for her to do what you want. Will be more dogmatic about right and wrong than you believe is appropriate because that is how she believes good things get accomplished. Needs you to provide a safe, predictable environment and protect it, especially fairness, adherence to policies, and enforcement of principles and values.

Amy needs direction from the company/firm more than you do and more than you'll feel is appropriate or necessary. Be sure you review her priorities with her on a regular basis.

Be aware that Amy has a passion to protect order, fairness, and justice that you don't share. While you may have things under control, be promoting the mission of the company, and handling things as fairly as you can, be aware that Amy, while having a degree of loyalty to the team or company, will also be judging you according to the standards she has set for a person in your position. This is not insubordination as much as it is her passion to protect that which she believes is best for the whole team/company.

Amy is loyal to the organization, whereas you are loyal to individual people. This means that situations can arise where you expect her to "fall in line" without challenging you or criticizing you, when in fact she believes that she is demonstrating her loyalty by doing just that. This individual won't be nearly as sensitive to your feelings, supporting you, or recognizing you, as she is more concerned with what is right for the whole team or company.

Neither you or Amy like self-promotion, people who are pushy, or value self-advancing behaviors. Because you share this perspective with her you are vulnerable to feed each other's views and not value others or see this aspect as providing solutions that it can provide.

## **Preparing to Have an Important Conversation with Amy**

Amy gets her sense of direction from you, the team, and the company. Describe the agenda for the conversation and ask Amy if that is OK. You take the lead, set the tone, and move the process along. You may need to encourage and support Amy through the process, so beginning with an affirmation of how Amy is valuable to the company and to you is important.

Amy needs things to be fair, make sense, and follow the plan. Start by reviewing the agenda for the meeting, have her express her expectations and then express your expectations. Remember that being subtle is not an effective way of communicating with Amy - so be clear and be direct (which does not necessarily mean blunt or judgmental).

If you value Amy's skills and abilities but have seen inconsistent performance throughout the year, then have the conversation be a time where you express what you've seen in her performance while you also pledge your support of her and agree on a development plan for the coming year.



# Don (Direct Report)

## Motivations

Team, right/wrong, reasons, mission, esprit de corps, predictability, and everything must be fair, logical, and planned out (especially salaries, opportunities, and benefits). (M2)

Be sure to: Give him clearly stated expectations for his and the team's success.

Set aside time to hear his views on things that are not immediately pressing.

Get things done, win, status, attention, be admired, get recognition, needs to be involved in doing things, and professional growth opportunities. (M3)

Be sure to: Acknowledge his work, efforts, successes, and contributions.

Tap his energy and desire to do good work by exhibiting confidence in him.

Personal connection to people and work, friendships, keeps personal touch, and likes to help others. (M6)

Ask his opinion, include him, personal passions, personal growth opportunities. (a mild form of M5)

Conceptual problem solver, likes to figure out conceptual solutions. (M9)

## Reminders

You must provide direction and a clear detailed job description and expectations to Don. (R1)

Needs time to connect to new ideas or direction, won't be able to flex or decide quickly. Give him time and space to adjust to new ideas, situations or changes. (R3)

Is very sensitive to being embarrassed in public – only correct him in a one-on-one context. Give him recognition for the work he does and tell him how good he is. (R6)

Don will struggle when needing to be sensitive to the political aspects of situations (aware of and effective in light of different people having positions of power or influence). (R10)

Ask Don to help you. (R11)

Don needs to touch base regularly in order to feel like his position is OK. Communicate with him on a regular basis, even if it is only to ask for an update on how things are going. (R14)

When frustrated with what he is doing, remember that in most cases being subtle does not work. While it may seem harsh, either putting things in writing or communicating bluntly (in a one-on-one session) will often be the only way to communicate effectively with Don. (R15)

You will be most effective with Don if you do not surprise him. You are likely to get a much more cooperative and favorable response if you give him a "heads up" that something is coming or give him some time to consider changes that were not anticipated. (R19)

Don will do best when you encourage and direct him on a regular, ongoing basis. While he is self-motivated to do a great job, you will need to be the person who brings the direction and sets the expectations while providing the praise and recognition for jobs well done. (R22)

When talking with Don about what you expect him to do, put it in terms of results rather than tasks on a

checklist. (R23)

## **In Light of You**

You are a lot more attentive and aware of political and practical dynamics, and therefore Don may see you as too political or not trustworthy because you appear to be too "manipulative" or politically motivated. Review with him why you take the approaches that you take, the importance of winning others, and what is needed to get results. It will be helpful for him to hear you talk through your practical, common sense reasoning, which he will not readily see.

You are more self-directing and have a higher internal need to achieve than Don has for himself. This can cause you to feel he is less ambitious and therefore less loyal to the company. It can cause Don to see you as excessively driven, insistent, or stubborn. Be careful that you do not miss the value of people like this just because it appears they do not have your drive or dedication – they still can be very valuable and competent.

From your perspective, Don will be too soft, too concerned about other's feelings, or too sensitive to feeling good about things before making a decision. While in many cases, your perspective will be more balanced as it comes to paying attention to other's feelings, a number of business situations require this kind of sensitivity. Be sure that you listen and evaluate the situation carefully before you dismiss his responsiveness to the feelings aspects of others and of decision-making.

Don needs more personal contact and interest than you'll be inclined to give or believe is appropriate. If you do not provide it, he may feel that you are uncaring about what is important to him and thereby may adapt an attitude of not caring about what is important to you. This individual's appeal to feelings or personal matters may very well frustrate you because they are neither rational nor explainable.

Don needs you to provide a clear mission and expectations in order for him to do what you want. Will be more dogmatic about right and wrong than you believe is appropriate because that is how he believes good things get accomplished. Needs you to provide a safe, predictable environment and protect it, especially fairness, adherence to policies, and enforcement of principles and values.

Don will need more verbal and public recognition than you feel is appropriate, and he will be self-serving to a degree that may be distasteful to you. Make him a public hero and he will continue to try to do great work.

Don needs direction from the company/firm more than you do and more than you'll feel is appropriate or necessary. Be sure you review his priorities with him on a regular basis.

Be aware that Don has a passion to protect order, fairness, and justice that you don't share. While you may have things under control, be promoting the mission of the company, and handling things as fairly as you can, be aware that Don, while having a degree of loyalty to the team or company, will also be judging you according to the standards he has set for a person in your position. This is not insubordination as much as it is his passion to protect that which he believes is best for the whole team/company.

Be aware that your sense of loyalty comes from a commitment to the team or to getting things accomplished. Don is more attentive to interpersonal loyalty – loyalty to individual persons whom he

respects and grows to know personally. This means that it is valuable for you to acknowledge his loyalty to you and acknowledge his helpfulness and support.

## Preparing to Have an Important Conversation with Don

Don connects personally to his work and will care about things and work at a personal level. This means he feels that his work is an extension of himself. You will probably not be thinking about Don's work in this way and therefore it will probably be helpful for you to explain that when you are talking about Don's work you are talking about what s/he did and are not talking about who s/he is as a person.

Remember that Don values his contribution and recognition for getting things done. This means that he cares about how you view her/his abilities and accomplishments. It is very important for you to affirm her/his abilities and contributions, so begin with an affirmation of your belief that anything you are going to bring up as being wrong will be in the context of your belief that he is able to do a great job and that you're counting on him to get it done the next time.

Don gets his sense of direction from you, the team, and the company. Describe the agenda for the conversation and ask Don if that is OK. You take the lead, set the tone, and interact with Don throughout the process. It will be good for you to affirm Don's abilities and contribution as you begin the discussion.

Don cares deeply about things and people he connects to - so have him explain what he saw was his contributions and then affirm those about which you agree.

Don values his work, abilities and being able to help. Be sure to give specific examples of roles and skills you value in Don and accomplishments that made a difference. If his compensation or bonus is near the top of the limits, express how well he does in comparison to others. If it is not, then express how what you believe could help him become one of the best performers.

Don is a DOER! Comment specifically on his energy, initiative and capabilities. Ask him how you can utilize his abilities and passion to get things done in a more effective way in the future.

Don needs things to be fair, make sense, and follow the plan. Start by reviewing the agenda for the meeting, have him express his expectations and then express your expectations. Remember that being subtle is not an effective way of communicating with Don - so be clear and be direct (which does not necessarily mean blunt or judgmental).

## Notes

---

---

---

---

---

# Ellen (Direct Report)

## Motivations

Team, right/wrong, reasons, mission, esprit de corps, predictability, and everything must be fair, logical, and planned out (especially salaries, opportunities, and benefits). (M2)

Be sure to: Give her clearly stated expectations for her and the team's success.

Set aside time to hear her views on things that are not immediately pressing.

Personal commitments, responsibility, personal goals, be viewed as trustworthy. (a mild form of M1)

Practical use of time, resources and people. Values money, effectiveness, action, and results. (a mild form of M4)

Ask her opinion, include her, personal passions, personal growth opportunities. (a mild form of M5)

Project accomplisher, loves tangible and practical results. (M10)

## Reminders

When frustrated with what she is doing, remember that in most cases being subtle does not work. While it may seem harsh, either putting things in writing or communicating bluntly (in a one-on-one session) will often be the only way to communicate effectively with Ellen. (R15)

## In Light of You

You will need to protect Ellen from her inability or unwillingness to self-promote or contend effectively in a political context because of your greater ability to do this for Ellen than she can do it for herself.

Ellen needs you to provide a clear mission and expectations in order for her to do what you want. Will be more dogmatic about right and wrong than you believe is appropriate because that is how she believes good things get accomplished. Needs you to provide a safe, predictable environment and protect it, especially fairness, adherence to policies, and enforcement of principles and values.

Ellen needs direction from the company/firm more than you do and more than you'll feel is appropriate or necessary. Be sure you review her priorities with her on a regular basis.

Ellen is loyal to the organization, whereas you are loyal to individual people. This means that situations can arise where you expect her to "fall in line" without challenging you or criticizing you, when in fact she believes that she is demonstrating her loyalty by doing just that. This individual won't be nearly as sensitive to your feelings, supporting you, or recognizing you, as she is more concerned with what is right for the whole team or company.

Neither you or Ellen like self-promotion, people who are pushy, or value self-advancing behaviors. Because you share this perspective with her you are vulnerable to feed each other's views and not value others or see this aspect as providing solutions that it can provide.



# George (Direct Report)

## Motivations

Creative viewpoints and ways of getting results, opportunities for individual expression. (M7)

Be sure to: Set aside extra time and energy when listening to his ideas and suggestions.

Be open to hearing new ways of looking at things or getting things accomplished.

Duty, responsibility, strives to meet own standards and expectations, accountable. (M1)

Be sure to: Express confidence in him when he has been dependable or trustworthy.

Hear his own assessment of his performance before stating your assessment.

Team, right/wrong, reasons, mission, esprit de corps, predictability, and everything must be fair, logical, and planned out (especially salaries, opportunities, and benefits). (M2)

Accomplish things, win, have fun, be recognized, make things happen, action, and professional growth. (a mild form of M3)

Keeps in touch personally, uses intuitive judgment ("it must feel right"), friendships, and relationships. (a mild form of M6)

Conceptual problem solver, likes to figure out conceptual solutions. (M9)

## Reminders

Before you impose your or the company's will – ask George for his advice. (R9)

George will struggle when needing to be sensitive to the political aspects of situations (aware of and effective in light of different people having positions of power or influence). (R10)

George needs to have opportunities to express his individuality and will struggle with being defined as part of a group or class without recognition of his individuality. Be mindful that routine job requirements can cause him a lot of frustration. (R12)

When frustrated with what he is doing, remember that in most cases being subtle does not work. While it may seem harsh, either putting things in writing or communicating bluntly (in a one-on-one session) will often be the only way to communicate effectively with George. (R15)

George has a fairly unusual ability to draw strength from within and in most cases will operate according to his own timetable, schedule, or expectations. (R17)

You will be most effective with George if you do not surprise him. You are likely to get a much more cooperative and favorable response if you give him a "heads up" that something is coming or give him some time to consider changes that were not anticipated. (R19)

When talking with George about what you expect him to do, put it in terms of results rather than tasks on a checklist. (R23)

## In Light of You

You are a lot more attentive and aware of political and practical dynamics, and therefore George may see you as too political or not trustworthy because you appear to be too "manipulative" or politically motivated. Review with him why you take the approaches that you take, the importance of winning others, and what is needed to get results. It will be helpful for him to hear you talk through your practical, common sense reasoning, which he will not readily see.

George needs you to provide a clear mission and expectations in order for him to do what you want. Will be more dogmatic about right and wrong than you believe is appropriate because that is how he believes good things get accomplished. Needs you to provide a safe, predictable environment and protect it, especially fairness, adherence to policies, and enforcement of principles and values.

George will need more verbal and public recognition than you feel is appropriate, and he will be self-serving to a degree that may be distasteful to you. Make him a public hero and he will continue to try to do great work.

George needs direction from the company/firm more than you do and more than you'll feel is appropriate or necessary. Be sure you review his priorities with him on a regular basis.

George has a very high ability to pull strength from within and stay on course in spite of not getting the support or endorsement of others. This means that he will be better at plowing forward when others disagree or don't understand than you are. As his manager, you may have to step in and tell him directly when he is misunderstanding or ignoring of others is a problem. Their attention will be more focused on what he believes is the goal rather than being sensitive to the concerns or need the support of others.

Be aware that George has a passion to protect order, fairness, and justice that you don't share. While you may have things under control, be promoting the mission of the company, and handling things as fairly as you can, be aware that George, while having a degree of loyalty to the team or company, will also be judging you according to the standards he has set for a person in your position. This is not insubordination as much as it is his passion to protect that which he believes is best for the whole team/company.

George is loyal to the organization, whereas you are loyal to individual people. This means that situations can arise where you expect him to "fall in line" without challenging you or criticizing you, when in fact he believes that he is demonstrating his loyalty by doing just that. This individual won't be nearly as sensitive to your feelings, supporting you, or recognizing you, as he is more concerned with what is right for the whole team or company.

You and George will both judge yourselves according to your own standards and expectations and drive yourselves to perfectly fulfill those expectations. So you both are very demanding of yourselves to the point that you lose sight of other things that are also important. Because you share this perspective with him you are vulnerable to feed each other's views and not see how your self-demanding perspectives can be excessive and costly in other ways. They also can cause you to gang up on people who do not push themselves as hard as you do, causing you to disrespect people who actually have a healthier perspective.

## Preparing to Have an Important Conversation with George

Remember that George values his contribution and recognition for getting things done. This means that he cares about how you view her/his abilities and accomplishments. It is very important for you to affirm her/his abilities and contributions, so begin with an affirmation of your belief that anything you are going to bring up as being wrong will be in the context of your belief that he is able to do a great job and that you're counting on him to get it done the next time.

It is important to George that his individuality is not stifled by the rules and processes of the company. It probably will help to allay any concerns by first stating that this conversation will be about George as an individual, who contributes his talents to the group. The goal here is that George feel that his/her uniqueness is not lost by the structure of the company's process or policies.

George values his work, abilities and being able to help. Be sure to give specific examples of roles and skills you value in George and accomplishments that made a difference. If his compensation or bonus is near the top of the limits, express how well he does in comparison to others. If it is not, then express how what you believe could help him become one of the best performers.

George thinks in novel and "out of the box" ways, so affirm his creative solutions and approaches as you have seen them this past year. Also point out how you want to be able to rely on his particular skills and abilities in the coming year.

George is a DOER! Comment specifically on his energy, initiative and capabilities. Ask him how you can utilize his abilities and passion to get things done in a more effective way in the future.

George needs things to be fair, make sense, and follow the plan. Start by reviewing the agenda for the meeting, have him express his expectations and then express your expectations. Remember that being subtle is not an effective way of communicating with George - so be clear and be direct (which does not necessarily mean blunt or judgmental).

### Notes

---

---

---

---

---

---

---

---

---

---

# Jennifer (Direct Report)

## Motivations

Get things done, win, status, attention, be admired, get recognition, needs to be involved in doing things, and professional growth opportunities. (M3)

Be sure to: Acknowledge her work, efforts, successes, and contributions.

Tap her energy and desire to do good work by exhibiting confidence in her.

Team, right/wrong, reasons, mission, esprit de corps, predictability, and everything must be fair, logical, and planned out (especially salaries, opportunities, and benefits). (M2)

Conceptual problem solver, likes to figure out conceptual solutions. (M9)

## Reminders

You must provide direction and a clear detailed job description and expectations to Jennifer. (R1)

Is very sensitive to being embarrassed in public – only correct her in a one-on-one context. Give her recognition for the work she does and tell her how good she is. (R6)

Before you impose your or the company's will – ask Jennifer for her advice. (R9)

Jennifer will struggle when needing to be sensitive to the political aspects of situations (aware of and effective in light of different people having positions of power or influence). (R10)

Jennifer will do best when you encourage and direct her on a regular, ongoing basis. While she is self-motivated to do a great job, you will need to be the person who brings the direction and sets the expectations while providing the praise and recognition for jobs well done. (R22)

## In Light of You

You are a lot more attentive and aware of political and practical dynamics, and therefore Jennifer may see you as too political or not trustworthy because you appear to be too "manipulative" or politically motivated. Review with her why you take the approaches that you take, the importance of winning others, and what is needed to get results. It will be helpful for her to hear you talk through your practical, common sense reasoning, which she will not readily see.

You are more self-directing and have a higher internal need to achieve than Jennifer has for herself. This can cause you to feel she is less ambitious and therefore less loyal to the company. It can cause Jennifer to see you as excessively driven, insistent, or stubborn. Be careful that you do not miss the value of people like this just because it appears they do not have your drive or dedication – they still can be very valuable and competent.

Jennifer will need more verbal and public recognition than you feel is appropriate, and she will be self-serving to a degree that may be distasteful to you. Make her a public hero and she will continue to try to do great work.

Jennifer needs direction from the company/firm more than you do and more than you'll feel is appropriate

or necessary. Be sure you review her priorities with her on a regular basis.

Jennifer is loyal to the organization, whereas you are loyal to individual people. This means that situations can arise where you expect her to "fall in line" without challenging you or criticizing you, when in fact she believes that she is demonstrating her loyalty by doing just that. This individual won't be nearly as sensitive to your feelings, supporting you, or recognizing you, as she is more concerned with what is right for the whole team or company.

## **Preparing to Have an Important Conversation with Jennifer**

Remember that Jennifer values his/her contribution and recognition for getting things done. This means that she cares about how you view her/his abilities and accomplishments. It is very important for you to affirm her abilities and contributions, so begin with an affirmation of your belief that anything you are going to bring up as being wrong will be in the context of your belief that she is able to do a great job and that you're counting on her to get it done the next time.

Jennifer gets her sense of direction from you, the team, and the company. Describe the agenda for the conversation and ask Jennifer if that is OK. You take the lead, set the tone, and interact with Jennifer throughout the process. It will be good for you to affirm Jennifer's abilities and contribution as you begin the discussion.

Jennifer values her work, abilities and being able to help. Be sure to give specific examples of roles and skills you value in Jennifer and accomplishments that made a difference. If her compensation or bonus is near the top of the limits, express how well she does in comparison to others. If it is not, then express how what you believe could help her become one of the best performers.

Jennifer is a DOER! Comment specifically on her energy, initiative and capabilities. Ask her how you can utilize her abilities and passion to get things done in a more effective way in the future.

Jennifer needs things to be fair, make sense, and follow the plan. Start by reviewing the agenda for the meeting, have her express her expectations and then express your expectations. Remember that being subtle is not an effective way of communicating with Jennifer - so be clear and be direct (which does not necessarily mean blunt or judgmental).

## **Notes**

---

---

---

---

---

---

---









## Motivations

Is driven to be responsible, dependable, and directs himself from internal standards and values. Will expect his direct reports to be self-directing and self-accountable, as well. Will tend to value individuals who have personal goals and strive to fulfill them, have standards to which they hold themselves, and have a sense of commitment upon which others can rely. When having difficulty with Jim, refer to his sense of responsibility and wanting to do the right thing and keep in mind that he probably has significant pressures and responsibilities about which you are unaware. Will expect work that is associated with his name to be up to his standards and will expect people to take initiative and be as accountable as he sees himself to be.

Team, esprit de corps, a common mission and standards are critical. When given news, suggestions or ideas outside what is expected, he will need time to adjust and consider new input. Surprises, interruptions or unanticipated changes are a cause of stress for him. Sees direct reports as team members who can be expected to try to attain the mutually agreed upon goals without regularly revisiting those. Will be attentive to what is fair, right, acceptable standards, or how things should be done. May tend to avoid discussions unless issues are of an absolute nature (plans, right/wrong, fairness, precedent, standards, compliance, equality, etc) so he may approach things only after they have become very serious. Often managers with this orientation adapt a view that "no news is good news." Expects direct reports to fulfill their responsibilities and support one another for the sake of the whole. Often considerations put in writing are seen more favorably than things that are discussed with this individual. Will also expect his direct reports to be truthful, communicate information so he will not be surprised by not knowing something that someone outside your department knows, and will expect you to be able to be counted on in your areas of responsibility without a lot of hand-holding. Bring solutions to Jim and have those solutions be well thought out.

A naturally confident and courageous person. Jim needs to help others and be included and know what is going on. Will like to give his opinion and therefore will usually appreciate being asked what he thinks about a particular topic. Will respect people who continue to grow and people who are courageous and resilient to criticism or rejection. Keep him informed.

Naturally attentive to other's feelings and uniqueness. Invests personally in his work and therefore will value it as an extension of himself. Will respond to people asking for help. Is naturally attentive to the value of building personal relationships. Cares about the feelings and inner-concerns of individuals. Will be attentive to the individuality of others and will want the team to have a "family" aspect. Will not respect people who mistreat or humiliate others.

Conceptual problem solver, likes to think up solutions. Will protect the system or plans that are agreed upon and proven. Will be sensitive to protecting the system and making sure that it can be relied upon. Will be frustrated when expectations are not met (computer system does not work, someone is late for a meeting, a project is not completed on time or up to standards, etc.). Often, Jim is not inclined to praise people for what they do unless their performance exceeds expectations.

Not attracted to people who try to gain by: taking from others, comparing themselves to others, or saying those things that leave a good impression in the moment. Be careful that you do not seek to feather your nest at the expense of others, toot your own horn in public contexts, or position yourself at the expense of others on your team. As your boss, he will most likely view these behaviors in a negative way.



The following descriptions are examples of the different types of motivations people have and statements, decisions, or factors that are naturally seen as good by those people. Keep in mind that if a particular dimension is a source of motivation for a person, then the absence of the elements of that dimension are a source of discouragement or frustration. For example: a person who is motivated by order and structure (M2 below) is very frustrated when a manager plays favorites, does not provide clear job descriptions, or fails to enforce company policies.

## Motivations

### M1: You Can Count On Me

Fulfilling one's own self goals, expectations, standards and values. This motivation indicates the person sees him/herself to be good when s/he is performing according to his/her own expectations and standards, is known by others to be as s/he thinks about him/herself ("I am dependable therefore it is good when others see me as dependable"), and is on track to reach his/her own future goals.

The following statements motivate people who think this way:

- "I am asking you to do this because I know that you can be relied on when you commit yourself to a certain task or job."
- "Thank you for doing what you said you would do."
- "Because you are \_\_\_\_\_ (fill in the blank with a characteristic that the person believes is true about him/herself: smart, capable, a winner, a quick study, dependable, persistent, loyal, etc.), I am asking you to take on this project."
- (In front of others) "(Name of person), is one of our faithful, dependable, loyal employees. We would not have the successes we've had were it not for his/her display of character on a consistent basis."

### M2: I'm On The Team

Doing what is right and expected, doing things according to schedule, agreed upon plans, within the mission or goals of the company, having things make sense, being logical, having things be predictable, fair, and dependable. This motivation indicates that the person will be driven to preserve order, what's right, the mission, the standards, the rules, etc. Often these people appear to be "control freaks" when in fact most of the time they don't need to have control, they just need order to be preserved and will preserve it themselves (often at personal risk or cost) if necessary. This can be as simple as correcting a person's improper grammar, to making sure everyone will be at a meeting on time, to taking on management when they see salary disparities.

The following things motivate people who think this way:

- Clear company mission, goals, and job descriptions.
- Management's faithful and consistent enforcement of policies.
- Holding people accountable to what they are assigned to do.
- Fair and consistent rewards and compensation.
- Providing information as to why decisions have been made and priorities have been set.
- Asking the person to help you figure out the most efficient way to get something done.
- Plans, stated purposes, goals, reasons, understanding, principles, and policies.

### **M3: I Can Do It**

Being seen as competent, capable and as a person whose efforts make a positive difference. These people like to see a direct connection between what they do and tangible results or benefits. They are confident, like to win, and are usually willing to bring the effort and energy necessary to make things happen (this sometimes is neutralized by other thinking orientations). This motivation indicates that the person values his/her efforts, energy, and capabilities and therefore hates to have others assume that s/he is not good at what s/he does.

The following things motivate people who think this way:

- Recognition for their work.
- Public praise, rewards, and being set apart for what they have accomplished.
- Winning and/or being part of the highest status company or team.
- Being asked to help because s/he does the particular task well or has the needed skills.
- Titles or office space that indicate that they are either better or valuable contributors.

### **M4: Let's Get The Job Done**

Effective use of time and resources. These individuals prefer short meetings that lead to a practical purpose. They like to get things accomplished, while achieving tangible, visible, and concrete results. This includes socially and politically useful decisions, actions, or tactics.

The following things motivate people who think this way:

- Money and/or tangible results.
- People doing things together, in a group.
- Motivating actions and talks.
- High energy and activity.
- Games, fun, and social events that are fun and full of energy.
- Short meetings that get things decided quickly.

### **M5: I Am Special**

Being seen as valuable and special just for who s/he is. This is the person's self esteem, who s/he is on the inside as a valuable person with opinions, feelings, and dignity. People who think this way need to be helpers because they see their inner intentions as good.

The following actions motivate people who think this way:

- Calling the person by name.
- Including this person in inner-circle types of situations.
- Asking this person's opinion.
- Telling others that this person is a key person in your organization.

## M6: I Care

Paying attention to the unique value of others, caring about their feelings, opinions, and personal interests. Bringing passion and personal investment to one's work. This motivation indicates that the person believes in the individuals' inherent goodness and therefore wants to protect that goodness (defend others' reputations) and protect them from having their feelings hurt.

The following statements motivate people with this orientation:

- "Will you please help me?"
- "How is \_\_\_\_\_ (family member who was sick, who was facing a difficult time, etc.)? Is there anything I can do to help?"
- "Thank you for helping me, it made a big difference to me personally."
- "You are an important part as to why people like to work here."
- "I love it!" (referring to a person's work)

## M7: I See It Differently

People with this orientation see the world in unconventional, non-linear ways. They see good where others see bad and bad where others see good. This leads them to arrive at solutions and ways of getting things done that do not make sense to individuals who reason conventionally. They need creative outlets and struggle with strict adherence to formula and recipes.

The following situations motivate people with this orientation:

- Creative problem solving.
- Using creative, unconventional means to get results,
- Being asked how they would approach a specific situation and not having their solution be second guessed or logically evaluated.
- Being given different and new kinds of tasks to accomplish.

## M8: I Manage Myself

People with this thinking orientation are self managed. They do best in contexts where individual performance is crucial for success. They are motivated when they feel that all is well in their world. They are best managed by managing the world around them and letting them set their own course of action.

The following statements work with people that have this thinking orientation:

- "Your success is our goal."
- "I want you to achieve your goals beyond what anyone else thinks you can do!"
- "You be successful, I'll take care of the company politics."

## **M9: Problem Solver**

The conceptual problem solver likes to find solutions. This person sees the value of knowing how things work and feels energized when figuring out why something does not work or how to build something so it works. These people naturally resist change but embrace it once they have had time to think about it.

Ask this person to help you figure out problems or show you how to make things better. Be ready to face resistance when this person first meets new ideas, new policies, and different ways of doing things, or changes that were not anticipated. Give him/her time to adjust to changes and do not take his/her negative reaction personally. In most cases the reaction is simply the person's initial reaction to change, and often this kind of thinker adjusts to and accepts the change once it is clear that it represents the way things are going to be.

## **M10: Project Accomplisher**

The project accomplisher is naturally attentive to managing projects that have a clear beginning and end and lead to concrete, practical results. This person will resist systems, requirements, and meetings that protect the status quo without producing results. S/he will expect others to get their jobs done within the established specifications and timeframes and will have little patience or sympathy when things are not done properly or on time.

This person does best with clearly defined tasks that have clear beginnings, expectations, and outcomes.

## **M11: Risk Finder**

This person naturally sees problems and calculates the downsides and risks. S/he will be most comfortable using his/her abilities to see how to fix or correct things to make them perfect, more reliable, or more effective. This person is naturally aware of the how things won't work and therefore is motivated to find how things are broken, can be improved, or what aspects bring risk to certain choices.

Give this person the opportunity to use his/her problem and risk analyzing abilities.

## Reminders

### R1: Give Direction

This person needs his/her world to provide direction regarding life and business. A clear job description, mission, and reasons for why specific behaviors are expected are needed by this person in order for s/he to move forward with confidence.

### R2: No Notice

This person's desire to not make waves and not promote his/her own position often results in an unwillingness to discuss problems until they are in an "all or nothing" condition. These people are often aggressive when the issues have to do with fairness, justice, or principles. They are often not aggressive concerning practical or political matters.

### R3: Takes Time

An individual with this thinking orientation needs to get a clear understanding and a good feeling about each matter/decision/person. This need to get a good feeling takes time. Once this person does understand and personally feel good about it, then it is very difficult for this person to change or surrender this newly formed conviction or decision.

### R4: Sensitive

Often these people appear to be very confident, driven or capable. Their sensitivity to their inner-self drives them to excel. It also can cause them to be a perfectionist, defensive, or excessively protective of their own reputation or good standing. Therefore, when managing people with this self-orientation, be aware that behind their confidence is a sensitive person.

### R5: Self-Judging

This orientation is very common among high achievers. It is an indication that this person is extremely critical of him/herself and is always judging his/her actions, choices, and accomplishments. It is usually better for a manager to let this person evaluate him/herself, because s/he usually will not encourage or compliment him/herself. When conducting a performance review, it is often best to let this person evaluate his/her performance while the manager then serves as an encourager, director, and motivator. Usually, people who are self-judging do not benefit from being judged by others. It is hard for this person to consider others' views about her/his behavior when it is inconsistent with how s/he views her/himself. Therefore be careful not to "define" this person ("This the way you are...") – definitions or labels feel like straightjackets to him/her and in most cases s/he will react without being able to hear what you are trying to say.

### R6: Don't Shame

People with this orientation are very sensitive to how they appear in public. They are totally undone when they are embarrassed or shamed in public. If you have to correct this person or "bring him/her down a notch," it is best done in private so the person does not react in a defensive or aggressive manner.

## R7: Self-Directed

This orientation indicates that the person does not trust the order and systems of the world and relies on his/her own order and systems. This means that the person is self-directed and will have his/her own values, goals and principles serve as his/her source of direction, guard rails, and standards for accountability. When these people look at the world's rules, principles, or systems, they feel that there is something inherently wrong and that the world needs them to help bring order or structure.

## R8: Too Humble

People with this orientation do not pay attention to what they actually accomplish. This causes them to miss seeing how much good they produce and accomplish. They tend to be ineffective in environments or situations where they have to defend or protect themselves (politically or promote their own work). Therefore, you can help this person by coming alongside and protecting, defending or counseling him/her when situations call for him/her to protect or defend what s/he did or does.

## R9: Ask for Advice

This person's orientation leads him/her to value giving his/her views, advice, and opinions. While this person may not have a position in the organization that necessitates his/her advice being sought, a great way to enlist this person's wholehearted involvement is to ask this person for his/her advice.

## R10: Help See How To Be Effective

This person's inattention to the political dynamics of the world can cause him/her to miss how things get done, what it takes to make things happen and miss the differences between being efficient or right and being effective. Help this person when s/he needs to be aware of, sensitive to and responsive to political dynamics in order to get the best results.

## R11: Ask for Help

This person wants others to feel good and therefore likes to help others. When you need this person to do something new or different, ask him/her to help you.

## R12: Novel Views

These people see the world differently from how most other people see things. They struggle with how the world presents itself, seeing good where others see bad and seeing bad where others see good. They therefore have a lot of creativity and novel ways of doing things. They have a difficult time doing routine jobs on a repeated basis. And they help their organizations with their creative and unconventional ways of seeing how to get things done.

## R13: Not Motivated By Absolutes

When motivating this person, watch carefully because s/he is likely to not be motivated by rules but by opportunities to get results or express her/himself individually. This means that managing this person will require more creativity, spontaneity, or informal "meetings" in order to get the benefits of this person's skill and abilities.

## **R14: Regular Contact**

This person values personal communications and "getting a feel" for things. This means that s/he needs to have regular contact in order to feel his/her position is OK. Communicate with this person on a regular basis, even if it is only to ask for an update on how things are going.

## **R15: Be Upfront**

This person thinks in absolute ways. Duty, responsibility, and definable expectations motivate this person. S/he thinks that it is important to do what is expected and to do the right thing. When frustrated with what this person is doing, remember that in most cases being subtle does not work. While it may seem harsh, either putting things in writing or communicating bluntly - with absolute terms and expectations - will often be the only way to communicate effectively with this person.

## **R16: Stress Sensitive**

This person is affected significantly by stress, so be careful to protect him/her from attacks, uncertainty, and political infighting. It is important for you to provide clear expectations, means to accomplish the goals, and support to this individual. His/her profile indicates that s/he has been under stress recently and most people, when in an environment that is conducive to being productive and effective, quickly grow in their ability to be effective in the midst of stress-filled situations.

## **R17: Inner Strength**

This person has a fairly unusual ability to draw strength from within. While this orientation usually makes people very good individual performers (sales persons, athletes, musicians, chefs, etc.), it can impede their ability to understand what is expected from others when they are under stress. Be sure to be clear with this person, and give him/her time to get a clear understanding of what you need him/her to do.

## **R18: Unaware of the Effects of Actions**

When a person is inattentive to the Relative Self, s/he misses seeing how his/her status, actions, or ways in which s/he differs from others affect how others view her/him. You will be called on to help this person see how his/her interactions, responses, and approaches make all the difference in how others respond to him/her. This can cause people to adopt a thinking orientation that expects others to take the lead, initiate or take chances and then places blame on others when his/her life is not the way s/he wants it to be.

## **R19: No Surprises**

This person focuses on how things should be and sees the world as a trustworthy, predictable system. They do not see the world as changing, unpredictable chaos. You will be most effective with this person if you do not surprise him/her because surprises live in the world of change and chaos. You are likely to get a much more cooperative and favorable response if you give him/her a "heads up" that something is coming or give him/her some time to consider changes that were not anticipated.

## **R20: Rejection is Personal**

This person values the Unique Self in comparison to the Relative Self. This means that s/he values "who" s/he is instead of "what" s/he is/does. Therefore this person will personalize rejection – believing that s/he has been rejected as a person when someone else has been chosen over him/her on the basis of competence. When working with this person, be aware that s/he can confuse the difference between being acceptable because of who s/he is and being accepted because of how well s/he performs a particular task.

## **R21: Special Projects Specialist**

Because this person values getting things done in the context of clearly defined missions, purposes, and schedules, s/he will tend to be better at seeing projects through to completion, than overseeing a process or organization where the results are not always evident. This type of thinker tends to thrive in situations where s/he has clearly defined objectives in order to get specific, tangible results. S/he will get frustrated in roles where the results get lost in the whole company's product.

## **R22: Recognition Works**

While praise, compliments, and public recognition do not affect most people, they do have a motivating effect on this person. While you may be concerned that praise will swell this person's head, you will find that s/he will do her/his best work when you encourage, recognize and direct her/him on a regular basis. While s/he is self motivating to do a great job, you will need to be the person who brings the direction and sets the expectations while providing the praise and recognition for jobs well done.

## **R23: Results Job Description**

Most job descriptions describe the areas of responsibility and authority the person has. When talking with this person about what you expect him/her to do, define it in terms of results rather than tasks that can be put on a checklist. An example of a results-oriented focus is, "Your job is to secure us 25 happy customers who buy from us again within 6 months." An example of a task-oriented focus is, "You are a sales person and you are to make 100 calls a day."

# Index of Team Members

## Direct Reports

Amy (Direct Report).....	4
Don (Direct Report).....	7
Ellen (Direct Report).....	10
George (Direct Report).....	12
Jennifer (Direct Report).....	15

## Peers

David (Peer).....	17
David (Peer).....	17
Doug (Peer).....	19
Jane (Peer).....	20

## Bosses

Jim (Boss).....	21
-----------------	----

