65. Cooper, Linder, Rutledge

Psychometrics: Practical Applications

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Kendall Lott: Hey PMs, have you heard the one about... an INTJ walks into a panel of experts and starts asking… Well you have, if you've listened to PM Point of View® episode # 59. Psychometrics: Myers-Briggs and Beyond. And if you haven't, go download it, I’ll wait... Okay, ready? At the end of that hour of energetic conversation, you'll notice that there was a lot left on the table, to still be discussed. So I've brought back our three experts, David Cooper, Ray Linder and Hile Rutledge, to go deeper into the actual practical applications of the psychometric tools. On this episode, we get some insight into the art of feedback, the importance of knowing thyself and thy team, how an expert can reach beyond the tool to bring the team together, separating behaviors from drivers, and the benefits of bringing these tools into play early on in the team building process.

Let's go!

Announcer: From the Washington DC chapter of the Project Management Institute, this is PM Point of View®, the podcast that looks at project management from all the angles.

Here's your host, Kendall Lott.

KL: I'm happy to welcome back the three excellent guests from our previous episode on psychometric tools. Hile Rutledge is the President and Principal Consultant of OKA, a training, consulting firm in Fairfax, Virginia, specializing in leadership and team development.

Ray Linder is an independent consultant with 20 years of experience in the organizational leadership/team development space. His focus is on helping people be themselves with more skill.

David Cooper is a senior consultant with Impact, a global, people development firm. He does leadership development, executive coaching and team development all over the world.

KL (2:40): So we're back here at the round table. We talked about some of the uses of the tools, last time, but I think this time now, I would like to focus on... So real people have actually paid you to come and help them? [laughter] What are the growth dysfunctions that gets you guys called in? Let’s just start with that. So PMs, we are going to go easy right here, which is, when it's this bad, you should really recognize it might be time to do it. What is an example of just when you saw it was so bad and you got called in? Hile?

Hile Rutledge: I've got one that…the one that I see most often is an inability or an unwillingness to communicate, to engage each other and to tell the truth, to just talk to each other. And I've seen it in public sector, private sector, I've seen it in all kinds of project management situations. When we don't have the foundation of the openness and ability to communicate with each other, then we are in big trouble. And one of the ways in which that manifests is we don't individually solve problems. And so if I'm here with Ray or if I'm here with David and we can't talk about whatever the issue is, and work it out, whether it's a project-specific thing or whether it's about you or me or some personal thing…If we can't do that, then the lines are crimped and content won't be able, if we have a personal problem, then the content will be able to flow on that either. We won't be able to solve our problems to get our work done, we escalate our problems up to some higher authority for them to work it out, and the whole thing breaks down.

And so one of the fundamental things that people will feel the pain of, that means that we're going slower, we're not talking... We're not engaging, we're dragging our feet when it even comes time to meet. We aren’t dealing with conflict and that manifests and delays. And at the heart of so many of those problems is we just aren't talking to each other.

KL: So have you been called in when that has happened? And someone says, “This is now delayed…”

HR: About half of the time... That's the reason. Most recently, I was called into an association. There was about 40 people there, and one of the hearts of this conflict was the director of the entire association, and her second didn't much like each other, didn't trust each other, and had polarized camps. And the director couldn't get rid of the second in charge because she was very politically connected with the board and so that it wasn't a matter of... I'm just going to flush you out of the organization and so... But their inability and unwillingness to communicate and what they did instead of trying to bridge the gap was to build a team around me of people who agree with me, that “Isn't she terrible isn't, isn't she hard to deal with?” And they were both doing that and so there were these two camps, neither which we're talking. Because they had had reached that point, we were called in. “And could you... I think we need the Myers-Briggs.” And I think, “You don't need the Myers-Briggs or the SDI or the TPI. These things might be helpful but what you need to do is go back to basics and actually just learn to talk to each other and deal with your own communication so that you can unearth the conflict.”

But that's most of what I did.

KL (06:24): PMs, there’s a big alert. Why are we seeing camps around the leader? So this is…the onus is on leadership and on the leaders, in this case. How did you get called in when it's the leaders who are at each other cats and dogs. And what did you do? So, it wasn't about just doing an assessment, and then saying, “You see how you're an introvert, and she's an extravert, and that's why you’re having this problem.” You did more.

HL: So two things: One, yes, it starts with leadership responsibility. But I'm really sensitive about trying to put everything at the leadership's feet because that means that while the leader can do a lot, if the leader doesn't, can't, won't actually move, I don't want the membership of that project team or that organization to think, "Well, I've just got to sit here and take this until the leader decides to do something different." A good intervention, a good solution actually empowers everybody to do something. So if a you're low person in the org chart, you might not be able to do things that impact the group systemically right away, but there are all kinds of actions that you can take to actually build effective relationships, promote open communication, create a safe to speak environment around you and promote one other person to do the same. And then again and again, you can do that from the ground up.

KL: So what did you do in that case?

HR: And so in this case, this was a group that wanted and was open to psychological type, to the Myers-Briggs, and I made sure that the leadership knew, and the leader called me in, hoping that knowing type would help her rival, her second to fix herself. If you understood your type, you know…now of course that's a fantasy.

KL: Triumph of hope over evidence.

HR: And so that's what got the phone to ring. Now, when we went in and worked I said it's very important for you to realize that for this to work, everybody is going to have to really inhale, this information and walk away with, "Here are the things about my personal style about my hard-wired cognitive tendencies that help me and make me cool." And, "Here are the things that actually frustrate me and frustrate the team about me." And that everybody has a story to tell on both sides of that ledger. And yes, your colleague is going to be one of these, but so will you, and so will everyone else on the team. Are you sure, you want to go forward?

Because the end result is everybody having to own, "Here are the things that I naturally do that actually retard the growth and development and effective action of this team." And then come to grips with what is it that I can do to show up differently, to show up more effectively in this. And so within that group, and that group is still on-going, I mean, so in terms of what... How did that resolve? We're in the midst of this. That was just a couple of weeks ago, where I kicked that off.

But in other things like this, what happens is between these team events that typically gets to feedback and conflict. How do I sit in front of you and say, "Kendall, when you do this, it has this impact on me. And can we negotiate something different?" And then you tell me the same thing. We need to negotiate a new way of showing up and working with each other. Now, type can help you get there. The SDI language can help get there, there are lots of tools, and on one level it doesn't even matter what we pick. Let's just pick one that we hold in common so that we can have this discussion. And I can sit and tell you my truth.

KL (10:15): Is that what you led them to? Is about the truth? About their being able to talk to their truth? Whatever assessment you end up with... You had to start there?

HR: Yeah.

KL: It's not about the tool right now.

HR: It’s not, and I, I think rarely is it ever about the tool. The tool is just something that enables me to stand on a perch of self-awareness to say, “This is who I am. This is how I'm different from you, this is what's going well, and by the way, this is where I struggle, or this is where you're going to struggle with me.”

David Cooper (10:50): Any of these tools are providing common language as a conduit to have these conversations as a conduit to have better relationships, to engage with each other in different ways with the backdrop of something that we all now have in common and can speak from. So the tool that we choose, we may deploy in service of particular things that are going on, at the end of the day, we're providing a common language tool that empowers everyone in the organization and the team and the group to have a voice. And that's where the leadership question becomes very interesting is…is…we want that to be happening and that's why this... deemphasizing , demystifying the leader's role or responsibility or accountability in that scenario, I think is a critical component to understand that what we're oftentimes doing is going into these teams or into these groups and intentionally or unintentionally looking to consciously or unconsciously empower those individuals to have a voice, and not look to all the answers from the leader ,not expect from the leader to have the solution set.

Because they won't oftentimes in that type of environment, where something is broken, or we're noticing that we're not having the communication that we need to be having. Or oftentimes what we'll get as practitioners is behaviors that are being elicited by a group and our clients will come to us with meaning they have assigned to that behavior and unknowingly, what they may or may not know, is that what they're really asking us to come in and do is help them understand the real meaning behind this behavior that they're noticing something's broken.

KL: So I like what you said there. And that's actually, Ray, how you opened our last podcast, is, “I see these behaviors. Where did they come from?” [laughter] But before I let you have a crack at that, I want to go on here, because today's meeting is about taking it from the academic down. So you said you've observed this, where they observed behaviors and they thought you could come in.

So, be specific. So what happened? What kind of thing was highlighted to you as, “I think I have this thing going on.” So we're past the outcomes, the team is not working well. “I see it this way,” and you, when you went in and dug in... Well, it turns out, it's this and we're really about empowering people in the team to participate as team members. So what's an example that you have?

DC: I think most recently, it was a senior leadership team within an organization that had a fair amount of history together. They had been together a while, there hadn't been a lot of member changes and the most senior individual on this team came simply with observations. “Hey, we're not... We don't seem to be performing.” The language being used was, “People don't like each other on this team.”

KL: There we go.

DC: “Our meetings break down quickly into silos of decision making, into a lack of consensus.” The language being used was, “We're not as agile as we wanted to be.” Now this happens to be an

IT shop, so they apply Agile development, not only to their software development, but into their organizational practice. So it was things like, “We lack agility, we don't like each other. And our decision-making processes are being hindered in some way,” by what was described as cliques.

KL: So they said, “Help me break down the cliques,” and you said...

DC: Yeah, so essentially it was, “Help us solve this problem.” And so, the first thing I think probably all three of us do as practitioners is say, "Okay great, let's break down those behaviors.” So you're assigning meaning to those cliques. “We don't like each other.” Things like this. “Our decision-making processes are hindered.” Well, what's hindering them, what does that look like in real life?

So my first task is just simply to observe those behaviors and start to question the meaning within the group and help the group understand and assign real meaning to that.

KL (14:52): They're reflecting outcomes as they perceive them inside an operation, but they're preceding outcomes. My meetings don't work, and we don't like each other. But you're saying that's the end result of observing behaviors and assigning and ascribing.

DC: Yeah, describing their own meaning to it. So the language that I'm hearing…you know, I'm filtering through the language that is, “Okay, that's observable data, okay. You're not making decisions. Great, we can work with that. You don't like each other? I don't know what to do with that yet.”

KL: So what did you do after you observed? [laughter]

DC: So in this particular case, what we led in with was the team performance model and the TPI. So what we wanted to do was give those folks a voice on that team through the TPI diagnostic, which allows them to just go in, semi-anonymously and confidentially, and answer some questions related to…

KL: Which relate to the Big Six areas. Real quick, brief us on that.

DC: Yeah. So these Six Domains of team performance, that look at

1. our external alignment
2. our unified purpose
3. our agreed approach to how we get things done
4. the effectiveness of our relationships
5. the quality of our conversations and interactions and how we're leveraging diversity in the group, and then
6. what kind of high performance mindset we might have.

KL: Well, I'm hearing four and five really screaming out here. That they were highlighting to... So you did do the diagnostic…

DC: Yeah.

KL: And you said...

DC: So we used that as a lead-in to, “Let's see what we're saying about ourselves.” So through a number of different interventions with that team, we presented the data back, we had conversations about the data, we actually did some recording of meetings and sessions that they were in, so we would video tape them and then play those back.

KL: Oh my God, that would make me cry. [laughter] I mean observing performance through video is hard enough…

Group: Yeah, right.

KL: …doing something athletic. But to see yourself going like, “Wow, I'm just sometimes ugly.” [laughter]

DC: And anybody had the opportunity to pause the video and say, "Hey David, what was going on for you right there? Why did you choose that language? What were you thinking when you said that to Hile?” Let's unpack all of that and map it back against what we were saying about ourselves as a team, and let's start to get under the surface of some of these behaviors that are getting in our way so that we...again back to this common language…Let's create a common language for what's going on, so that we stop this propensity for just simply blaming the dysfunction for whatever we're assigning the meaning to. We clearly don't like each other or those guys just don't get along or we can't do this because you don't play the same way that we play.

KL: So through your assessment were you able to see an area to focus on more? And then you said, “We unpacked it.” What did you do and what did those folks do? Because you're talking about empowering everyone to have a sense of why they’re there at the table.

DC: Yeah. Yeah. Very interesting actually, for this particular group. It hinged on their unified purpose, which was not what you would go in assuming, given the data and given this team, and given what they were saying about themselves. However, what happened was, because it's a senior executive team, with members that have a clear line of sight to six very different realms, if you will in the organization, they tended to only speak from that realm and be focused on that realm. So when they began to talk about the unified purpose of that particular team, not their teams, not the org, this executive leadership team, you had six very different responses to why they existed as a group. And until they understood why they existed as a group, why they came together… And they actually talked about disbanding for a while because they couldn't come to agree.. they were like, "Well if we don't have a reason for our own existence, why are we operating in this way?”

KL: Yeah.

DC: Until the CIO challenged, “Wait, I pulled us together for this specific reason. Is this not the reason that we could... “ So then, entering that conversation of “Why do we exist as a team?” gave them the clarity of... “Oh, when I'm with this group of people in this space, I'm wearing a very different hat, and representing a very different individual within this organization. And when we behave together in service of this unified purpose, which is to shape the direction of this organization and shape the direction of where we are headed… be strategically focused, support those under us in support of the mission, of our overall enterprise organization, etcetera…” That was the switch for them. That was what allowed them to then refocus on their relationships and start to build some rapport...

KL: They self-corrected.

DC: Yeah.

KL: And it wasn't about have a better meeting.

DC: Yeah, yeah, it wasn't about... “I don't like you,” it was about, “I was sitting here protecting my piece of this bigger pie. Not recognizing that you were doing the same thing in service of what we didn't agree on as a purpose as a direction for this group.” And as soon as they aligned around that context of... “Oh, we exist as a team to do this,” it changed everything, and then all a sudden we were able to rebuild relationships if you will.

KL (20:00): So Ray, as you've heard these guys talking about how they started to get inserted and getting really specific to how you've had to interact and what you've gotten out of it, I want to shift the question to you for a case study. When is it a person's problem…when it's John or Mary is the leader that has really got a dynamic working that’s different from the team, where they're not getting it. I wonder if we can take it to an individual interaction level.

Ray Linder: I've seen that. I'm guessing both David and Hile have seen that a lot.

KL: They’re nodding.

RL: I’m not sure that they would agree... And they're nodding Yes. Because that's the hardest problem to solve. I think it's much easier if the problem is at some group level and whatever diagnostics we’re using, and whether we need to learn feedback from each other, and understand the structural team dynamics, understand relationships, etcetera. When we're all sort of learning about each other together, that's an easier problem to solve than when it's one person's problem. And depending on how much influence that one person has over the team, over the company, over the culture or whatever it is…just how salient or powerful the effect of that one person has and if that... whatever that is… is unchecked, that's a really, really, really challenging problem to solve.

Because (A), it probably exists, because (A): They're not aware of it. They're not aware of it because they're not getting any feedback about it. Or they're getting feedback and they don't care.

KL: Is it feedback or accountability? I mean in the organization?

RL: I think the organization is not being accountable for giving this person feedback.

KL: Okay, there's a hint, PMs.

RL: Yeah, is what's happening. I believe this person would be more accountable for the effect they’re having on others, but there's a blind spot that no one's filling in. And there's not an organizational culture around, or willingness to have, difficult conversations. “Give feedback.” There's just a sense, “Well, maybe the problem will just go away, maybe it'll just get better.” And I'm like, "Well (A) It's not going to go away if nothing makes it go away and it's not going get better if no medicine has been applied."

KL (22:23): Is that consistent with what you guys have observed about the feedback of the group around the powerful person who's not getting it?

HR: I certainly think that the feedback is one of the primary keys and is lacking in far more organizations than are actively practicing. I mean, that's a deficit in most places, as I certainly agree with that. One of the things, and I think this is just trainer prerogative, because, Ray, I would say just the opposite in terms of if I had my personal choice of which problem to touch, which thing to take on, the problem is the individual, the problem is Jack, or the problem is the group. I'll take Jack every time.

RL: But why? So yeah, I'm hearing you. Is it that you have the greater skill or interest in Jack?

HR: Or at least my fantasy is I have greater skill and focus on that. Because the problem is focal. Now, it's about Jack and how Jack touches these various parts of the organization. But the focus is tight and small…

RL: I agree.

HR: As opposed to once we get out into the team, it's everywhere. It's a system and it's like a balloon and once you squeeze in one area, it's going to bulge out in other areas. And all this is happening at once, which is real and complex, but harder.

KL: It may still actually be about the stakeholder Jack, but Jack's not aware that Jack's the problem. So we weren't really saying it was a team problem per se. It's just that the system for providing the feedback…

RL: Yeah, I agree with that.

KL: You can't solve Jack until Jack knows that Jack is actually being the one being asked to solve something.

GROUP: That's right that's right…

HR: I think one of the first steps is that we need to now inhale, or help Jack inhale some data, and that comes from feedback. Is that through a 360? Is that through the TPI?

KL (24:16): So what's your intervention?

RL: Yeah, it sort of both of those things, then. It's trying to encourage the organization. Let's either use the tools that you have, or let's get some tools. And I work on using those tools, so we're filling in those blind spots, right?

But then it's also to Hile's point, it's like, "Okay so let's work with Jack and give Jack some self-awareness." And it's touchy, right? Because Jack is a system in and of himself, but within a system. And so whatever you do with Jack, then Jack has to go take that and be Jack in this system that's really kind of conspiring against maybe his being better, right?

KL: So how does that play out? Tell me more about what does that look like?

RL: So then it gets really, really super frustrating to Jack, because he's working with a successful coach or counselor, and getting all this great advice. And so in the SDI world, we talk about overdone strengths. And so a lot of times when we talk about someone being a problem, they're choosing behaviors because they believe they're going to get a productive outcome when they choose those behaviors. They are not choosing those behaviors to come off being a jerk. And as human nature is, is when I'm not getting that productive outcome, my instinct is I need to do more of…

KL: I was going to say “Talk louder.”

RL: Yeah, talk louder and faster, as if my volume and intensity of speech is going to clarify your understanding, right? Which…

KL: Always works!

RL: Always works, right? So their strength then becomes an overdone strength, which then produces adverse outcomes, which is then the problem. Jack’s a problem, right? Because they're seeing Jack as being too domineering. Jack’s a bully. Jack is arrogant. Jack is rigid. Whatever these negative connotations are, when Jack is just trying to be a productive individual. So, many times using the SDI and, granted, there are other tools… But an aspect, really a key aspect of the SDI is how relational conflict is caused by an intentional use of a behavior that the person believes is going to produce a productive outcome. And then when it doesn't, it causes conflict with one or both of the individuals involved…

KL: Oh that’s the underpinning of that. I keep swinging and missing, I'm going to swing harder.

RL: I'm going to swing harder... And so alerting that person about... “So let's talk about this from the standpoint of overdone strengths. Do you believe that you are perceived this way? Have people sort of hinted that maybe you're coming off this way? Do you believe that you're coming off this way? Let's talk about the things you do. And so when that doesn't happen, do you believe you push harder? And so the end result is your behavior might look like this to somebody?” And hopefully the person has enough emotional intelligence and self-awareness, and probably, maybe got some feedback at whatever level that feedback was. And the light bulb begins to go off.

“Hmm. Yeah, I never had it presented that way to me before. Maybe that's something I'll think about.”

And so then I use an analogy, “OK let's turn either… (A) turn down the volume,” or, if I'm using that metaphor, “Let's tune into a different station.”

Right? So use this behavior, but use less of it or maybe another behavior, another avenue, other pathways to getting this outcome that you're looking for, rather than this one pathway that you're using. And that takes into account, “So what do you know about the members on your team? The people that really you find challenging? What do you know about their style that might have you thinking, ‘Okay I need to approach them slightly differently,’” And then hope that the persistent application of different behavior… and persistent is really, really important because perceptions are really, really hard to change.

KL (28:05): Because a lot of times leaders say, “I've really made a change here,” and it's been a week, it's been two status meetings.,

DC: Right.

KL: But there's a reason. For us it's a big lift to make a change, to think through that. So we wonder why everyone's not seeing it. Does that happen for you?

RL: Yes, yes exactly.

HR: I think if you're working with somebody on developing something, whether it's a member of a team, or the leader of a team, one of the most important things she or he has to do is one of the things they’re going to most want not to do, and that is to go around and quick, but one-on-one conversations, and disclose to everybody what you are planning to do.

So for instance, I decide in my coaching with Ray that I'm going to work on my empathy. And so rather than my just sitting back and in my mind, doing all these things that are now projecting my empathy, a very important step is for me to go and sit with David, my colleague, and say, “I'm doing some coaching work and part of what I'm going to work on is empathy. And so if I'm not, I would really like for you to remind me of that. I'm asking you to help me by pointing it out when I don't do this. Similarly, if you see that I am, I would love the reminder that it's showing up.”

So on both sides of that. And I talk to David and I talk to Kendall and I talk to Ray. Because Ray’s point that it's hard, that perceptions are hard to change… If I tell you, “Hey this is important and I am trying to show up differently,” then it's on your radar. Now you might not trust me, you might not believe me, but the predicate has been laid down that this is something that's going to change. And so, you're that much more sensitive to me trying. Many leaders resist doing that because it's so exposing. But actually I double-down on it as a coach, because that vulnerability you show, I mean, it helps you in the end. You actually gain leadership power by stepping in and showing some of that vulnerability.

KL: So the tool was accountability in a bit. Like activating personal accountability. And the system needs to provide some positive feedback.

RL: Absolutely. And the psychology of just how we receive feedback. Just positive messages have a multiplier effect on us, right? They make us feel better than negative messages make us feel badly, right? So, each positive message counts two, three, four times as much in terms of helping us change than the negative.

DC: This is why personally, I love working, trying to get into that group level, the org level, as soon as possible because that system, that larger system is critical in support of those individuals. So I agree with Ray on the individual standpoint. The most challenging individuals that I find to work with are the Jacks that don't have the awareness or the willingness to grow and change. So the jack that has the awareness and the willingness... I'm okay with that Jack, you know?

I'm confident in that Jack taking on the actions that Hile is suggesting and getting decent results.

It's those Jacks that lack either the awareness, or more often, frankly, the willingness. They're not going to necessarily work on your behalf all the time. And when we can get in from the system-wide level, at the org and the team level, and begin to have these conversations that stress the importance of the support that that organism, that system has for every individual – meaning building expectations of those conversations, building expectations of those feedback loops, then Unaware Jack doesn't get to hide so much.

KL (32:03): When you guys are actually intervening in that kind of case. After you've done the kind of team work and you've got the individuals working, how do you get the feedback working there? Is it about observing them doing it? Are people having meetings about how they need to start acting with each other? I think they're also doing a lot of actual meetings to do *work*. They're interacting doing email and phone calling and texting…

How does the continued monitoring process actually work?

RL: It has to be baked into the culture. And I'm thinking specifically of one client that I've had interactions with over the past few years. But they had really launched this sort of purpose of building a feedback culture – and they used that language. “We're trying to build a feedback culture.” Would you come out and work with our leadership team and show us how to use the SDI in helping support our feedback culture?

And then you spend the day giving them some tools you put the tools in the context of a common language, that they're already using, so that's a very, very comfortable. And that common language makes it really, really easier to do, because it sort of objectifies what can be a very subjectively scary conversation. But if we're talking about letters, or colors, or types or whatever it is, it kind of tends to objectify it a little bit...

KL: How did you talk SDI language into a feedback system? Give an example of how you would use a word like that.

RL: Yeah, so we talk about…the SDI is about motives, OK? And motives are what I really, really care about. So we get to the level of what I really care about. Then there's messages and messaging that allow me to feel someone speaking to what really matters to me. Right? And so in the feedback there is always some objective event that happened that triggers the need for a particular conversation. But based on a person's personality, how they're translating their role in the event and how they're translating your telling them about their role in that event…motives really, really matter.

A people-oriented person is right away thinking, "What did I do wrong? And does this mean this person does not, or is never going to like me?” And maybe I'm…hyperbole for a fact…but they're thinking really about the relational aspect. Yes, there was some maybe technical work event, but they're not equating their sense of identity to the check mark of doing or not doing this task. They're really looking at it as, “the relationship I have with the person with these people and where do I stand in terms of that relationship and what I'm hearing about my relationship.” Where another type of personality is... “Well, I did it this way because I thought it was right. I obviously had bad information. Give me the correct information. And this won't ever happen again.” They're not thinking relationally, at all. “This is just a case of misinformation and if you explain it to me as a case of information, okay, then I can receive this message.”

So again, a lot of it is, “What is this event that you're objectively telling me about? How does it possibly threaten my sense of identity? If you're already telling me I did something wrong, then this means something to my sense of identity.” And the SDI is a tool that can kind of help us understand how we see our identity.

KL: Had you worked and their feedback?

RL: So we used the tool. So when you're talking to a person of a certain motivational value system, understand how they're seeing this. So right away really…I was talking about empathy… One, we're trying to understand how the other person is going to see themselves in this conversation so we're... (A) We're going to need some empathy.

So knowing that, and I'm talking – let’s say we’re talking to a people-oriented person – so I know that I need to…body language, tone of voice, pace of the conversation, my lead into the conversation. All of that's going to matter in terms of their receptivity to the message…that I need to build a message in a way that, again, the person of this type of personality style or motivational system is going to hear that message. So it's really about, “How do I identify how this person is best going to receive this very, very difficult communication?” Right? So it's both a combination of technique and empathizing – ability to empathize and show empathy – and craft empathetic messages, using your personality, tools or common language.

KL: With that team, what did you end up observing after you had that discussion with them, and took them to the tools, and had them working?

RL: Yeah, I worked with the team. So let's talk about the kinds of common things in the work that you do in the roles that you ran, what are sort of some common things that happen that are serious enough that you would say in your feedback culture, “Yeah, this comes up, and we often need to have these kind of conversations.”? So what are the things that you know you should be having conversations about that you're not…that are telling you, you need to have this feedback culture here? These are things that we never really talked about. Okay, so let's build some scenarios around those things you never talk about.

DC (37:15):This is a question for all of us. Do you find yourselves helping organizations to define feedback or challenging their feedback culture, or even needing to lead in with helping the organization understand feedback or define feedback?

RL: The answer is yes, because you say the word feedback and everybody immediately has their own connotation of what they think that means, and so putting some parameters around that in a way that's meaningful for what they think they want to do.

DC: You'll go to an organization and you’ll say, "Hey what's the feedback culture?” So they're so proud of their feedback culture, and we talk about it and all of a sudden it becomes clear that what they have may be is a data transfer culture, where people are saying things to other people about things…

RL: Right.

DC: …that may or may not be feedback.

RL: Exactly. Yeah.

HR: Yeah, and the image I like is a Venn diagram, where you're a circle and I’m a circle, and the degree to which we overlap is the degree that we are connected to each other, open to each other. We don't have to like each other, but we share things in common, we're inter-dependent. I trust your data. Even if I don't like you, personally. And there are plenty of project teams I work with where that fine. We don’t have to be buddies, but I need to be able to share this with you, hear what you have to say, learn from you. And feedback is the mechanism that enables us to be and stay in this open space with each other.

And I personally have never had it successfully maintained or perpetuated without the leader stepping in and taking ownership of it. If it’s a team where the leader isn't going to grab onto it and really urge that it be done, and do it herself or himself, if they aren't going to do that to keep it going once I leave, it's left as soon as I shut the door behind me. So when somebody says, "I want a feedback culture.” It's like you're going to have to do the heavy lifting and you're going to have to name the deputies who along with you are going to do that heavy lifting, you're going to need to do it unprompted by me once I leave.

KL: Have you seen that work?

HR: Yes, I have, I've seen it. I've seen people try it, and it fails and I've seen people try it, and it succeeds.

KL: What does succeed look like?

HR: Succeed looks like…the leader after the feedback training day [laughter] the leader will actually give feedback and ask for feedback. So I want you to give feedback to me now, and I expect you to give it to Ray, and Ray, you to David, and we're working it. It's now part of our evaluation process. As soon as that's on the sheet of paper that now you're being evaluated for it, in terms of how well you're doing on this project, that's a legitimate thing now.

RL (40:16): People who are used to measuring things, especially like this, which I will call "behavioral” it's really important that we have a shift of mindset. Typically, measurements are used, say, rewards and punishment, right? Okay, so we know who's doing good, we know who's doing bad. And the bad people have to up their performance, so they're doing good, so it's always a reward and punishment thing. That's fine and that's fair, and that's obviously useful. I'm not denying that we shouldn't do that, but we can't only do that.

KL: Okay.

RL: Measurements should also be for the purpose of learning and adjust. Replace the mantra, “reward and punishment” with “learn and adjust.” Because what happens is, when you only measure for reward and punishment, and people feel like they need to get the reward, this is why people cheat.

KL: Right. Perform to measure.

RL: And all the ways in which we confound the measurements, trick the measurements, lie about the measurements, fudge the measurements, whatever. We're doing that so that we make sure we get the reward and not the punishment, and we haven't learned anything. And so part of that, that also has the emotional safety that when we don't hit the measurements, part of the feedback is now this is a learning opportunity rather than I screwed up and I'm going to get a bad evaluation.

KL (41:40): So, broadly, I'd like to ask you guys about the measurements… a little bit about outcomes. A team got back on schedule. Something got closed. Money was made. Delivery happened. Political realm… something got passed. Something happened because people were inserted into healthy relationships, or they healthily entered into relationships that they can then handle.

RL: We don't actually necessarily get to see the ultimate outcome. We're called in at some early point in the process. We've helped unlock them, we've helped them move along, we've helped them move faster and better than they were before, but then we're gone.

HR: Not to inflate our value, but... But a doctor doesn't get to experience the end goal, which is a patient's development and health over time. They just...

RL: That's a good…that's a good analogy. Repair, fix this, or here's some advice. You're trying to lose weight, you're trying to run a marathon, you're trying to… Okay, here's what you need to do. And you give advice. We're not necessarily there finding out what happened two years later.

KL: It does beg a question at some point about how do you know when you've been successful? Even if from a team's perspective, I'm not sure, perhaps if it leads directly to all my outcomes as a team. But how does your client and how do you know that it's been successful ultimately is a punch line of some sort.

DC: How do we know we're doing better? It changes for the "What are we looking to get better?" Because there are certain things that are much easier to measure than others. And on the heels of the feedback conversation, if good feedback in a feedback loop becomes critical to the measurement, if you will, of the success of individual or team movement in certain areas, if we're looking to develop our capacity for individual emotional intelligence or individual ability to provide better feedback or a team's ability to communicate, or build relationships in different ways, there's not necessarily tangible, tactical deliverables that we can assign from a metric standpoint. Oftentimes it becomes the feedback loops that allow us to understand, "Hey, that was a great conversation we just had, David, and here's why: You asked me these questions. You used this language that made me feel comfortable, you said these things that made me feel a part of the team, whereas several weeks ago you were using language that made me feel like I wasn't a part of team or that made me angry or not." So in answer to your question, I think there are a number of developmental opportunities or development goals that we might have as individuals or teams or organizations that, from a metrics standpoint, oftentimes rely on the feedback loops that we can create so that we can start to track different behaviors having different results than they were having before. And that becomes a big part of it. Because there's not much else to measure. It's not related to how fast we're building product; it's not related to our sales at the end of the quarter. Now there will be correlations, and we'll start to see upticks in that. But it's hard to, it's hard to directly correlate them.

KL: Well do you see it in the problems that were highlighted which is, are they being more agile now? Are they making decisions? The meetings were breaking down; do the meetings not break down? Is that what gets measured?

DC: Yeah. And those are the things that we start to…

KL: We're back to observable behaviors.

DC: Yeah, yeah, we're coming back to, how would we answer these questions? How do we begin to commit to understand and believe in the responses we're getting back?

HR: That's the beauty of it, and even the purpose of the TPI, there, is the...Team Performance. You can actually measure those very things. There are 30 items, plus the open-ended items, but that you answer and you can do a pre- and post-. So we measure it, and we do some work over a month or six weeks or six months, and we go back and measure it again and see, "Yes, we struggled in these areas around unified purpose or effective relationships or whatever, and we could see the movement." Same with emotional intelligence.

Those are assessments both that allow for pre- and post-testing to actually see, "Did the work we're doing, actually show up in a bump in score?"

KL (46:15): I'm struck by something you said early, David, that they had these behaviors or highlighted to you as, "I see these problems happening." And your kind of response is, and it happens for a lot of consulting environments I think, was, "Let me dig in underneath that." It sounds like by digging in and then doing feedback loop and getting people to self-reflect and be willing to share and all that, what we begin to measure, again, the assessment notwithstanding, we come back out again. Are we seeing that above the ice? There's these deep waters below. You had to punch through the ice to get down there. But one of the things we observe is back at the ice level again. So are our meetings working and things like that. Or do we have to assess? Now I'm having more meetings about how I'm having better meetings.

HR: Well the way I see it, we had a medical analogy earlier. I went to the doctor here recently because my leg hurt. It turns out – he was interested that my like hurt – but it turns out I had torn my meniscus and so he actually operated on my meniscus. I didn't know anything about my meniscus I just knew my leg hurt. And so, there's a manifestation on the surface, but then there's a cause of that. And the person who's suffering from the pain of a team that doesn't work, or a team that's not on time, or a team that can't deal with its conflict, they don't know that, or know why. And so we always go in complaining about the symptom. But we have to figure out what's causing that symptom.

DC: And the iceberg model is a fantastic model to use for this because so often what folks are seeing on the surface is not what's going on. And I think a huge part of our work is to help individuals and teams to build awareness and recognition that we have this tendency to just ascribe meaning and value to surface level stuff that we're observing and not be curious, to really engage in and ask ourselves the question of, "What's happening here?"

So my executive team, I want them to be able to do that. Let's be really curious for ourselves about what's happening here and understand it and get under the surface of things and be able to do that work on their own. Being able to be curious about those things that we're observing and not take them at face value is…it's what all these tools allow folks to do.

KL (48:54): Ray, tell me about how you assess. How do you know when it's been working and specifically when you’ve engaged with a client? I’ve been called in to do... I've done, I found, I saw…

RL: Kind of taking off of what David said, sometimes it's a matter of giving the client the skill to do for themselves after we're gone, to be able to do that for themselves. Along with that, though, is maybe giving them the ability to measure themselves along the way, right? And so I've started a number of classes with a simple exercise. And the exercise is, “So how many hours a week do you spend in conflict?” And have them write that down on the sticky and I grab the stickies and at some break, I'll arrange them in sort of a frequency distribution kind of chart along the wall, so they kind of see that, compute an average. I know the clients, so I've already walked in with kind of an average dollar per hour salary range of people in that particular role. And so I'll hit them with the number. So you're saying, as a group, your company is spending X thousands, hundreds, thousands, millions of dollars on unproductive conflict. And so here's how I measure that.

So your job now, knowing this and knowing how to compute this, is to reduce that amount, right?

KL: Yeah.

RL: And so whatever your average hours are, you guys are spending an average of 20 hours a week, in conflict? Alright, so reduce that to 15. Or you say individually you know, you, Hile, you're 18 hours. Okay, so your job is reduced that by 10%. And that's something you can measure yourself. I don't need to be there anymore. And use the measurement again for Learn and Adjust.”

KL (50:40): Have you been asked to work with a team – in PM speak it's like a kick-off meeting, although that's not necessarily the first meeting, but that's a big one often, right? Where people get together and work. Have you seen it being helpful there? How did you know it, what did you do?

RL: So again, I mean, the outcomes remain to be seen. But it was a global company and the kick-off was called a leadership summit, and so senior level, VP and above leaders, were invited to this, and the theme was around change and change management. And interestingly enough, they were insightful enough that they were looking at it, “Well, we don't need you to teach us how to do change, we have a change process. What we understand though, there's psychological aspects of change, and that's what we'd like you to help us with. And we want to use the SDI as part of our culture. Some of the people in the room may have had exposure to it before, some maybe only heard that other people, other aspects other the parts of the company were using it. So we're going to use that as our common language.”

They actually handed me a set of slides. And said, “When you want to come in to do SDI, do your thing on that. We've got a set of slides that we want you to talk to in terms of psychological stuff, but here they are in advance. Edit them, change them, do whatever you want with them, just use it as a basic platform.” And so, I injected a lot of my own content into their content, and the sense was coming out of that, that that was exactly what they're looking for.

But it was kind of a set up for the psychological relational aspects of this change theme that they were going to be seriously dealing with, and how can that intersect with processes that they felt like they've already lined those processes up? Here's the check mark steps and milestones and things you're supposed to do along the way.

KL: How did they recognize that it was valuable even at the moment when you were done? They said, "Now we know more?" "All of us know the same stuff, we're all baselined?"

RL: You know, a big aha was that the way that they had been leading or thinking about how to lead…they got some insight into... "So, maybe what you're saying is this style is going to affect my team in these ways somewhat positively, but also in these ways negatively." And just raising their level of self-awareness raising their level of empathy, raising their way of thinking about having a broader palette of things that they can work with in just managing the psychological…

KL: We want to check back in on that to see if it works.

RL: Yeah, I definitely have, I have a great deal of curiosity…

HR (53:23): When I'm doing any kind of group start-up, the 101 level thing that I start off with, attributed to Peter Senge, it's called, the EIAG model, but it's E-I-A-G. The E is experience. I is identify. A is analyze. And G is generalize. And so with them I talk about it. And then I have them do it and do it and do it, so in the half-day on the day that I have them, they start getting some momentum, a little bit of muscle memory, in going through the steps, in the hopes that it'll take root.

And the idea is we have an experience. So you and I working together, E is experience, and we're having this conversation right now. Something happens, anything, we are actually plugged into this outside world together, we have an experience in common. Then we I identify. If we're healthy and we're learning as a group together, we then identify, "Hey Kendall, when you just said that, this is the impact it had on me. You said this, and I reacted this way." And that could be a positive thing or it could be a negative, whatever, but I'm going to identify, and the important points of identification are things that went on to me, with me, that you would not know if I did not tell you. That this is what happened, and it's about disclosure. And then we analyze that in terms of, "Oh well, why did you feel that way? I didn't mean that. So, why did you take that in a negative way?" And just, you know, we can talk about, "Well, what I meant to say was…" or "hat I meant..." But that needs to pivot to generalize. Otherwise, we just stick in the, "Yes you did say that. No, you didn't. You shouldn't have felt that way." We stay in the review mirror. Generalize pulls us into the future. So what do we want to do next, what do we want to do in the next exercise or whatever tomorrow or from now on? Given that that was a dynamic that happened, or that was a tendency that we had. Well, so maybe you'll agree not to say that, or I'll agree to check in with you to make sure you're not…or… But we make some agreement about the future and that actually becomes a norm. The first few times it's clunky as we work through this, but when it works, we just while we're working on our task and getting stuff done, it's just concurrently moving along. Teams that work well do this.

DC: It's leading with the foundation of the model. EIAG supports High Performance mindset. It inevitably supports effective relationship building and growth and things like that. So when we're brought in on the front end, it's leading with a foundation of the team performance model. It's the instance where we're not actually using the team performance inventory, because here's a team that can't really say anything about it. So, we're not using the tool itself. We're using the model to create a framework of, “Look you're a new team. In order to be successful, in order to be as high performing as possible, these are six domains that are critical to your success. And so, let's own what they are, understand what they are. And then as we build in each of these domains, our understanding, our alignment, our access to them, let's start to leverage these other tools that will help us.” You know, MBTI, SDI, Strength Finders, Emotional Intelligence, all these things really help, particularly the effective relationships domain, and to some extent the quality conversations domain. When we look at agreed approach, it's about leveraging operational excellence things, and things like team charters and all these different tools we have. Amidst the foundation of, “If you want to be as successful as possible, here's the six critical needs that you have, and let's just check the boxes in those, in the order that we need to check them in.” Because there's not necessarily a prescription or a hierarchy of where we get into this; it's about the conversations we're having to understand our access as a new team.

KL: Has it been reported to you that that's been helpful having been on the front end?

DC: Yeah.

KL: Because as you say, you have to explain, use a model to give them a heads up. But we're not assessing yet because they're not a team yet.

DC: Exactly, yeah. What we're doing is providing a common language tool that just simply allows them to go, “Oh okay, so in order to be successful here are some things we know we're going to need, there's things that play that we should focus on, and it allows us to focus on them in similar ways, with similar language, as opposed to hoping it happens organically.

HR: We're all doing the very same thing. It almost doesn't matter if we’re using the Myers-Briggs, if we're using the SDI. It's trying to help people understand each other and then communicate so that we can collectively come together and then get something done.

KL (58:06): So there you have it. It's all about getting the job done, empowering others to take immediate steps, and rather than waiting for your team to find its happy place, why not be proactive? The tools are out there, along with the practitioners and the experts who know how to make them work.

Special thanks to my guests, David Cooper, Ray Linder and Hile Rutledge. Feel free to reach out to them. You can find David Cooper, at ImpactInternational.com. You can follow Ray Linder on Linkedin, or check out his website, which includes his blog, at raylinder.net. Or just email him directly at Ray@goodstewardship.com. Hile Rutledge’s website, which also includes a blog and other excellent resources, is OKA-online.com.

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I'm your INTJ (Thinking Judgmental Introverted) host, Kendall Lott. And, as always, keep it in scope, communicate, and get it done.

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