

# Managing with Style

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Do some of your employees challenge you? Do some do exactly what's expected but never come up with new ideas? Do some generate ideas a mile a minute and then never finish? Do some just "show up" and that's all? You've learned the hard way that there are many different personalities, and a cookie-cutter management approach doesn't work for everybody. This dynamic workshop will help you manage with "style"—coaching, delegating, and holding people accountable in ways that motivate their particular personality style. The results? You'll have improved morale, teamwork, creativity, and productivity. Come and build on your experience, get feedback that honors your values and personal style, and have fun learning more about what makes people tick.

## **Introduction:**

The current economy makes good staff hard to find and harder to keep. Companies are looking for ways to help valued employees develop and adapt to this ever-changing business environment. Coaching can help managers discuss development needs with their direct reports in ways that positively affect their relationship and lead to higher morale and increased productivity. If done with respect, with clarity, and in a way that matches the individual's values and motivations, coaching can transcend the traditional boss/subordinate relationship and lead to significant change.

## **Overall Objectives:**

In this workshop participants will:

- integrate this coaching approach with their own experience and values;
- distinguish between two levels of change (developing skills/behavioral change, reframing attitudes/breakthrough in perspective);
- learn coaching skills and a coaching process for breakthroughs with employees;
- develop their coaching skills through practice and feedback, in a supportive environment, using situations from their own experience;
- be able to coach nine different employee types for maximum effectiveness;
- learn from each other.

## Support Material:

*The Heart of Coaching*, Thomas G. Crane

*The Nine Ways of Working*, Michael J. Goldberg.

# WORKSHOP DESIGN

**Note:** Preferred workshop size is limited to 16 people, to enable discussion, practice, and feedback (from participants and from facilitator).

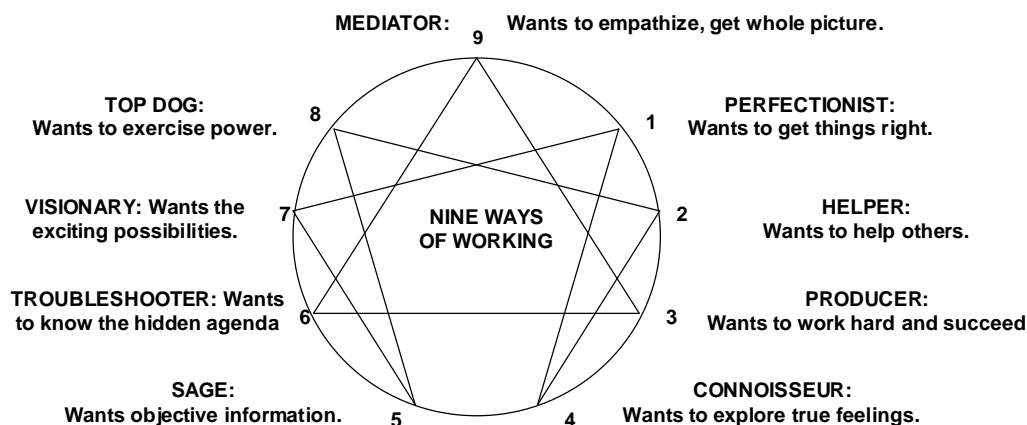
Module One: Introduction—Four Hours (with mid-way break):

*Objectives:* Participants will

- understand relevance of previous management training to content of this workshop;
- have common-sense awareness of distinct employee styles, each with different gifts and blind spots;
- be able to distinguish the three phases of breakthrough coaching;
- be able to observe key coaching communication skills;
- be able to provide specific, descriptive, behavioral feedback about coaching skills;
- feel enthusiastic about learning more and becoming more effective as coaches;
- feel trusted and trusting in a participatory, team-oriented learning environment.

*Content/methods:*

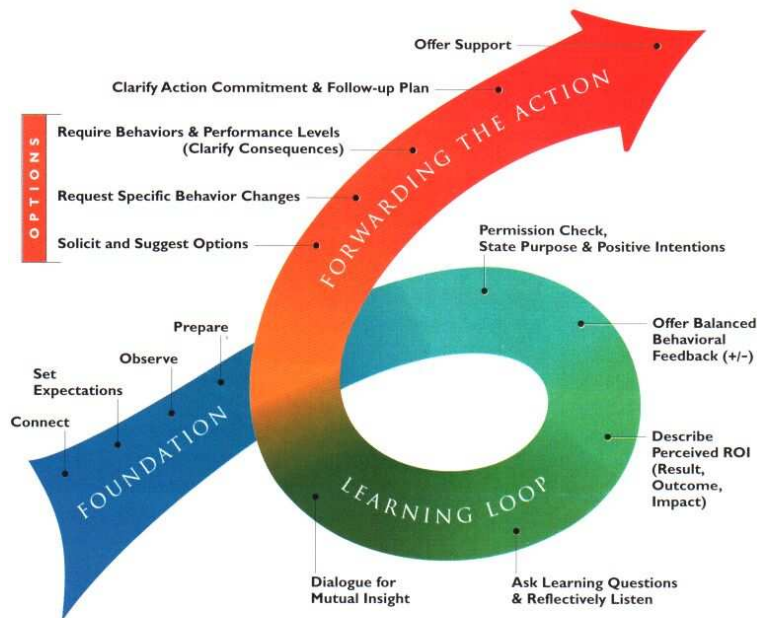
- **Introduction to workshop:**
  - Review agenda/objectives for total workshop and for this module.
  - Participants introduce selves, their business/role, their goals for this workshop.
  - Definition of “coaching” (created by brainstorming with participants).
- **Relationship of workshop to previous training:**
  - Solicit participant training experience.
  - Discuss how previous experience fits in this workshop.
- **Introduction to employee styles:**
  - Participants share personalities of employees they’ve found easy/difficult to coach and facilitator builds model of employee “types” based on their input (full model as seen below will be covered in third module and related back their descriptions).



- Brief discussion of how identifying employee styles leads to more effective coaching (build on their examples).
- Note that they will observe self/others to learn about personalities here in workshop.

- **Coaching Practice:**

- Review three phases of coaching and communication skills for each (from *The Heart of Coaching*, page 82):
  - (1) The Foundation (connect, set expectations, observe and prepare),
  - (2) The Learning Loop (share purpose, feedback, ROI; listen, engage in dialogue),
  - (3) The Forwarding-the-Action Phase (changes, commitment, support).



- Today's emphasis on The Learning Loop and Forwarding the Action.
- **Feedback Guidelines:**
  - Ask participants how they like to get feedback, what hurts/gets in the way.
  - Together develop feedback guidelines (includes specific, descriptive, focused on behavior).
  - Explain how they will use guidelines to observe and provide feedback about upcoming role-play.
- **Role Play** (designed for maximum learning, minimum threat—participants will get to be the “coach” in upcoming modules):
  - In teams of 3-4 (depending on workshop size), each describes situation where they wish they had been coached better (teams will be diverse by “type” based on facilitator’s implicit observations); teams agree on most representative situation and announce to large group; group selects 2-3 common situations for role play.
  - Volunteers play themselves, facilitator plays the boss, modeling breakthrough coaching skills (also making “mistakes” to provide data for “constructive feedback”).
  - Observers are assigned categories of coaching skills to observe in facilitator’s behavior during role-play (each will have checklist with own categories only):

Observation Categories	Clarification	Check # of times	Brief summary of what was said...
<b>The Learning Loop:</b>			
Request permission, state purpose and positive intentions	Make sure it's the right time/place; they're willing/able to listen		
Offer balanced, behavioral feedback	Subjective (attributes) & objective (measurable results)		
Your perception of the ROI	Impact on performance & relationships		
Ask learning questions and listen	Open-ended questions, reflective listening		
Share your related personal experience	Your challenge, options, actions, results, learnings		
Use dialogue for mutual insight	Free-flowing, suspend assumptions, find common ground		
<i>Stop here if in agreement and next steps are obvious</i>			
<b>Forwarding the Action:</b>			
<ul style="list-style-type: none"> <li>- Solicit/suggest options</li> <li>- Request specific behavioral changes</li> <li>- Require behaviors &amp; performance levels &amp; state consequences</li> </ul>	<ul style="list-style-type: none"> <li>- First time around</li> <li>- If changes haven't occurred</li> <li>- If unacceptable performance continues</li> </ul>		
Clarify action commitment & follow-up plan	Integrate with their values, identify steps, capture commitment		
Offer support	Appropriate support (leaving them the accountability)		

- After role play, person being coached comments on experience; observers give facilitator feedback in assigned categories.
- *Debriefing* discussion, Q&A.
- *Repeat role play* with another situation as time permits.
- **Field work assignment:** Participants announce to group a specific goal to practice with an employee, to bring back to next session for discussion.
- **Reading assignment:** Sections in *The Heart of Coaching* and *Nine Ways of Working* that reinforce today's topics.
- **Final Comments/Feedback:**
  - Note application of “coaching” & “personalities” to peers, family, etc.
  - Ask them to hold facilitator accountable for “walking the talk” – it’s facilitator’s goal to model in this workshop as their coach whatever is asked of them as coaches
  - Ask for their feedback about the workshop so far (content, methods, process) along with recommended modifications for upcoming sessions

## Module Two: Breakthrough Coaching—Four Hours (with mid-way break):

*Objectives:* Participants will

- describe the two levels of change and how they apply to employee personalities;
- understand the principles of change (employees must want to change and know how);
- value the benefits of appreciative feedback;
- be able to coach someone through the three phases of breakthrough coaching;
- be able to give behavioral feedback;
- be able to demonstrate coaching communication skills;
- feel positively reinforced (appreciative feedback) for behavior that moves them toward their own coaching goals

*Content/methods:*

- **Review:**
  - Feedback/discussion of field work (practice with employee),
  - Q & A about readings.
- **Two Levels of Change:**
  - Participants are asked to think of a time when they changed – feelings, behavior, thoughts – and share with group.
  - Discuss what helped that happen? Who or what outside of you triggered or aided that process? What internal resources did you draw upon/discover?
  - Brief lecture on two levels of change, drawing from their own experience (first-order change = skills/behavioral change; second-order change = attitudinal change/ breakthrough in perspective).

- **Breakthrough Coaching:**
  - What is “breakthrough” coaching?
    - Coaching where (1) nature of boss/subordinate relationship is transformed to partnership and (2) employee achieves breakthrough in perspective.
    - Example with employee who always looks for what could go wrong:
      - Manager might coach employee to change **behavior**, learn creativity technique to focus on the positive (skill building or 1st-order change).
      - Manager might help shift employee’s **attitude** to notice the “box” they’re in, seeing only problems and not possibilities; employee become transformed when there is a **shift in perspective**, e.g., automatically sees both the positive and the negative (“reframing” or 2nd-order change).
  - *Breakthrough* coaches are able to:
    - share their vision of significant change with employees (behavioral change, shift in perspective),
    - coach in such a way that employees experience a partnership, feel energized by new perspective, vs. just complying with requirement for different behavior.
- **Coaching Phases and Skills Revisited:**
  - *The Foundation Phase*
    - Create relationship and coaching climate
    - Skills:
      1. **Connect** – Establish rapport, clarify expectations and commitment to coaching process, identify job-related challenges each wants to address
      2. **Set Expectations (GRATE)** – Clear direction and goals/support (if peer), delegate if direct report (purpose, importance, details, “success” (what it will look like), measurements
      3. **Observe** – Suspend judgment, assume innocence, identify assumptions, be curious, be humble (we all face challenges in life).
      4. **Prepare** – Center yourself, handle your anger, be conscious (beginner’s mind), demonstrate vulnerability (own learning experiences), limit your words, contemplate your questions (from your heart), distinguish between requirements and preferences (*preferences* are suggestions, options, alternatives vs. hard-and-fast *requirements* which are only sometimes necessary).
  - *The Learning Loop* (share purpose, feedback, ROI; listen, engage in dialogue)
    - Skills:
      1. Request permission, state **purpose** and positive **intentions**
      2. Offer balanced, behavioral **feedback**
      3. Describe your perception of the **ROI** (result, outcome, or impact) on performance & working relationships: *“I think your reaction had a negative impact on others in the room. The new supervisor, Ted, became a little irritated, too. The tone in the room changed, I thought, from one of cooperation to everybody trying to cover their tails.”*
      4. Ask learning **questions** and reflectively **listen**
      5. Use **dialogue** to gain insight, until you discover common ground (From *The Fifth Discipline*, p. 10, “dialogue” = the capacity to suspend assumptions and

enter into a genuine “thinking together” vs. “discussion” = a heaving of ideas back and forth in a winner-takes-all competition)

(**NOTE:** Stopping here is not only possible, but often advisable. If the feedback and dialogue processes have been fully honored, creating insights for both people, it is obvious to them what their next steps might be.)

➤ *The Forwarding-the-Action Phase* (changes, commitment, support)

○ Options:

1. Solicit & suggest **options** (ask “what if”, encourage “out of the box” thinking)
2. **Request** specific **behavioral changes** (BCR=behavioral change request); e.g., “*Mary, we’ve talked previously about your being late to meetings. I noticed that you arrived about 10 minutes late today. Because this continues to be disruptive, I’m asking you to either stop coming in late or to find a replacement to represent your department. How would you like to handle this?*”
3. **Require behaviors** and **performance** levels; **state consequences** (if unacceptable levels of performance continue)

With any of the three options:

4. Clarify the action **commitment** and **follow-up** plan (what’s important to employee? what are the steps going forward?); performance contract if necessary
5. Offer **support** (touching base, interventions with others, training, reviewing work, etc.), while leaving accountability with employee

● **In-depth practice of coaching process and communication skills:**

- Each participant describes a specific coaching situation and goals within teams.
- Participants alternate as “coach” in teams, receiving feedback from each other for each round and from the facilitator to the degree possible (facilitator will oversee all teams); observers use observation sheet with assigned categories.
- Debrief and discuss in large group.

● **Appreciative Feedback:**

- Generate discussion of reinforcement – their views, experience
- Principles of Appreciative Feedback:
  - Traditionally, once managers have set their expectations they’ve spent most of their time focusing on what’s *not* working well.
  - With appreciative feedback, once the manager and employee agree on the desired behavior and steps toward achieving it, subsequent feedback is based on *what is going well*—specific ways in which the employee is moving in the desired direction.
  - This means *any* incremental step!
  - Appreciative feedback works because it gets you out of the rut of noticing (and reinforcing) problems—it calls out the best in people and actually accelerates the process of positive change.
- Review their coaching goals and self-feedback on steps achieved today toward those goals
- Group discussion of ways they can use appreciative feedback with their own employees.

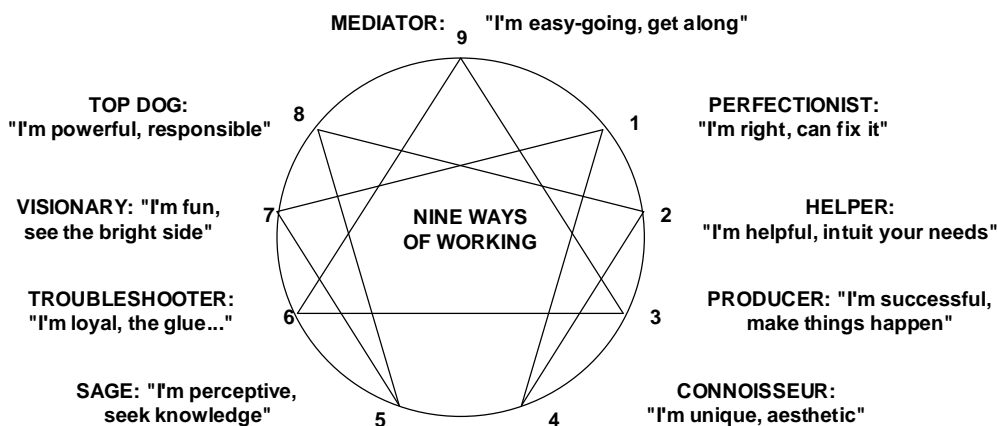
- **Field work assignment:** Participants announce a specific goal to practice coaching and appreciative feedback with employees, to bring back to next session for discussion.
- **Reading assignment:** Sections in *The Heart of Coaching* and *Nine Ways of Working* that reinforce today's topics; also web site pages reviewing principles of change and appreciative feedback.
- **Final Comments/Feedback:**
  - Answer any questions
  - Ask participants to hold facilitator accountable to "walk the talk" – in what ways facilitator has and has not modeled the coaching phases/skills and given participants appreciative feedback
  - Get their feedback about the workshop so far (content, methods, process) along with recommended modifications for last session

Module Three: Nine Employee Personalities—Four Hours (with mid-way break):

*Objectives:* Participants will be able to

- identify their own personality, its gifts and blind spots as a manager and as a coach;
- make good guesses about their employees' personalities;
- prepare for coaching discussions with each person reporting to them, based on breakthrough coaching model and employees' personality

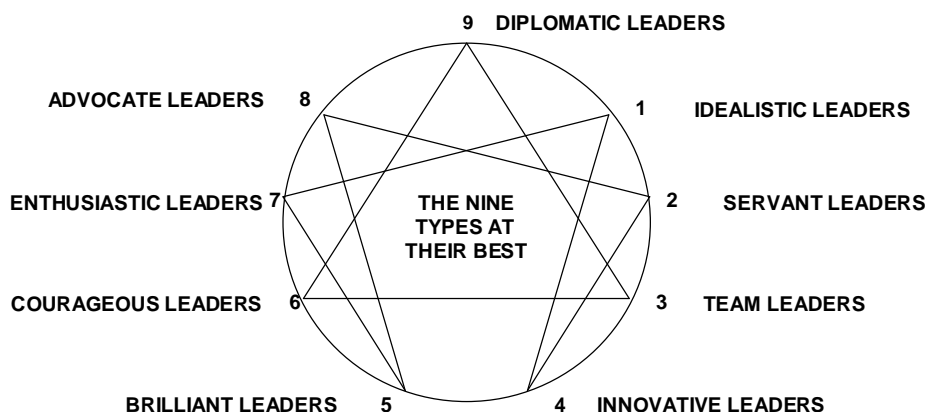
- **Review:**
  - Feedback/discussion of field work (coaching, appreciative feedback with employee)
  - Q&A about readings
- **Review of nine styles:**
  - Overview, where participants see themselves and why:



- **Self-Identification:**
  - In large group, participants offer best guess about own personality style and
    - why they think it's theirs (motivations, behavior),
    - how it has affected their manager role/coaching style,
    - ways in which they'd like to be more effective, with employees/peers.
- Interactive exercise to elicit personality characteristics/feedback among participants
- **Employee personalities:**
  - Educated guess about own employees' personalities and what they observe—strengths and weaknesses
  - Group generation of common-sense ways to approach each personality; what language to use, etc.
- **Field work:** (1) observe employees and get more data on personalities—their focus of attention, how they talk, what they value; (2) practice coaching a particular employee.
- **Reading assignment:** Sections in *The Heart of Coaching* and *Nine Ways of Working* that reinforce today's topics; also educational web sites on nine Enneagram styles.
- **Final Comments/Feedback:**
  - Answer questions
  - Get their feedback about the workshop so far (content, methods, process); to what degree facilitator has "walked the talk" by being open about own personality's gifts and flaws, sharing experience, being in partnership with participants

Module Four: Breakthrough Coaching by Type—Four Hours (with mid-way break):

- **Review:**
  - Feedback/discussion of field work -- Observations of employee personalities? Tried coaching one? What worked? Didn't work? Answer questions about readings
- **How personality informs coaching goals** – Development possibilities for employees (using graphic below and summary from *Nine Ways of Working*):



- **Ones**
  - When “stuck” in type: Rigidly demands one right way.
  - Idealistic leader: Opens to imaginative possibilities and alternative frameworks.
- **Twos**
  - When “stuck” in type: Hides out by taking care of others.
  - Servant leader: Looks inside, finds own pathway to contribute.
- **Threes**
  - When “stuck” in type: On a fast-tracked ego trip.
  - Team leader: Becomes thoughtful, introspective, prudent.
- **Fours**
  - When “stuck” in type: Tempestuous, evanescent, emotional.
  - Innovative leader: Connects with eternal verities, brings about necessary change.
- **Fives**
  - When “stuck” in type: Detached, observing.
  - Brilliant leader: Engages, motivates to make an impact and a difference.
- **Sixes**
  - When “stuck” in type: Suspicious, alone, critical of “authority.”
  - Courageous leader: Trusts process and organization.
- **Sevens**
  - When “stuck” in type: Creates and discards whatever comes to mind.
  - Enthusiastic leader: Treasures select ideas, thoughtful, wise.
- **Eights**
  - When “stuck” in type: Pursues personal power and revenge on enemies.
  - Advocate leader: Protects and nurtures people.
- **Nines**
  - When “stuck” in type: Immobilized by taking every position.
  - Diplomatic leader: Acts from own position, becomes efficient and effective.

- **Coaching Tips by Personality Type**

- In large group, discuss how employees’ types affect behavior, motivation, reactions to coaching (in general, and specific to their employees)
- Participants describe what helps in coaching their own type
- Generate a few more tips for coaching by type, using common sense logic; review in terms of:
  - Starting where employee is (what appeals to their type)
  - Keeping breakthrough change in mind (how shift perspective, invite breakthrough)
- Teams by type generate more coaching tips and report out to large group:
  - Tips that start where employee is (what appeals to their type)
  - Tips that keep breakthrough change in mind (how shift perspective, invite breakthrough)
- Review and compare team recommendations to handout based on *Nine Ways of Working*:

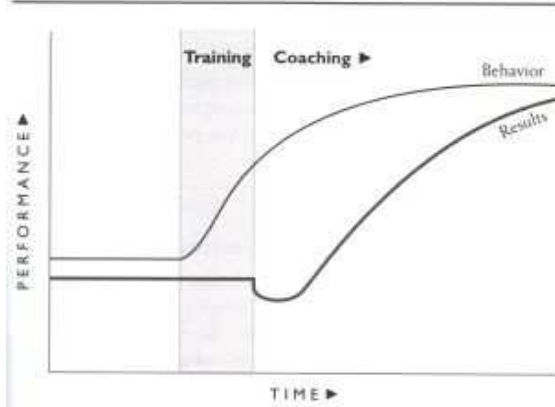
- **Ones** learn best by watching closely, making checklists, knowing the “rules”:
  - Be especially clear with expectations, guidelines
  - Be very thoughtful and descriptive with feedback vs. invoking defenses
  - Provide them with resources to manage their “tirades” better
  - Help them observe their “shoulds” (for self and others)
  - Help move them toward creative thinking, breaking the “rules” in creative ways
  - Use humor and encourage their humor
  - Overall Goals:
    - ❖ Appropriate intervention vs. “fixing” (“God grant me the serenity to accept the things I cannot change, the courage to change the things I can, and the wisdom to know the difference”)
    - ❖ Be in more of a “flow” state—imaginative, innovative, optimistic
  
- **Twos** learn best by connecting, exchanging stories, feelings, experiences:
  - Give genuine praise and let them know you truly like them (vs. flattering)
  - Speak from the real needs of the situation so they know how they can help
  - Provide them with rationale/resources to say “no”
  - Help them observe the degree to which they *assume* what’s “best”
  - Encourage self-disclosure
  - Coach them to get *and accept* direct, truthful feedback without retaliation
  - Overall Goals:
    - ❖ Valuing their own feelings and positions enough to state them directly
    - ❖ Balancing a keen sense of principle with the requirements of the task
  
- **Threes** learn best through trial and error; be practical and efficient:
  - Get on their list; get their attention
  - Be well-prepared and organized; get right to the point
  - Set clear parameters for success
  - Help them observe the degree to which they use external criteria for validation
  - Show the benefits of learning from failure
  - Help them discover their feelings and those of others; start with physical sensations if necessary
  - Overall Goals:
    - ❖ Becoming committed, interdependent team members
    - ❖ Being fully honest with themselves and others
  
- **Fours** learn best when what they’re learning is allowed to reveal itself:
  - Make clear why you’re asking for change, its essence, why valuable
  - Honor their unique depth and insight; let them do something creative to make it their own
  - Make your commitment to them clear
  - Help them observe the degree to which they are blocked by their moods
  - Encourage them to find positive satisfaction in the present
  - Help them identify a cause, an ideal, a principle that can guide their progress
  - Overall Goals:
    - ❖ Distinguishing between feelings and values (“I am *not* my feelings”)
    - ❖ Moving from chaotic world centered on mood to principle-centered approach

- **Fives** learn best when expectations are clear and they're not personally exposed:
  - Make your points orderly, organized, well-conceived, *theory* behind change
  - Tell ahead of time about the session, allow time afterwards to get back to you
  - Let them work things out by themselves, with lots of data, especially books
  - Help them observe the degree to which they play it safe, withhold from others
  - Show effects of withholding their knowledge and experience
  - Coach them to develop boundaries that allow sharing feelings and opinions
  - Overall Goals:
    - ❖ Balancing their sense of intellectual engagement with genuine passion
    - ❖ Willing to wield power in the world to do good instead of hiding behind their role as observer
  
- **Sixes** learn best when they can trust you and the information you're sharing:
  - Be a partner vs. "the authority;" earn their trust
  - Don't overplay or underplay; let them know they're getting the straight information
  - Give them time to explore the details, including negatives as well as positives
  - Lay out a clear plan without surprises; don't belittle their concerns
  - Help them observe the degree to which they see only the downside possibilities
  - Coach them to widen their field of vision
  - Overall Goals:
    - ❖ Seeing the big picture – where they fit and how they can trust others to do their part
    - ❖ Being energized and transformed by including the positive options
  
- **Sevens** learn best from an interactive approach; they like insight and stories:
  - Give lots of analogies and pictures; be prepared for rapid give and take
  - Ask a lot of questions – they love hypothesizing
  - Align with their vision; don't clip their wings too soon – help them see the change as an interesting opportunity
  - Help them observe their tendency to start things they don't finish
  - Co-create agreements on boundaries, deadlines, and limits with teeth; be sure to confirm what's been agreed to
  - Show them how their dreams can work; if possible, give them permission to get someone else to do the grunt work
  - Overall Goals:
    - ❖ Owning their fears, acting on their ideas instead of just thinking
    - ❖ Learning patience and discipline, following through with power and impact
  
- **Eights** learn best from hands-on experience, and may test you – make sure you are clear where you are:
  - Spit it out, don't waffle, don't embellish; be concrete vs. subtle or philosophical
  - Treat them with respect; if they blast you, acknowledge their power but acknowledge your own, too (vs. escalating)
  - Set clear limits and be prepared for them to be tested
  - Help them observe the degree to which they have a win-lose perspective
  - Help them learn to listen, to put themselves in others' shoes, to draw on others' talents
  - Coach them to show more vulnerability – make it worth their while

- Overall Goals:
  - ❖ Acting with natural power, without guile, accepting the way things are without needing to control
  - ❖ Using their power in service of others
- **Nines** learn best by *osmosis*, where they're immersed in something, especially like to collaborate in safe, ongoing conversation:
  - Don't mistake silence for agreement or "yes" for an answer
  - Establish very clear performance goals with agreed-upon stopping points and deadlines
  - Confirm commitments with follow-up memo
  - Help them observe how they try to satisfy everybody's positions
  - Encourage them to talk and coach them to develop their own opinions (starting with what they *don't* want can help)
  - Point out when they're minimizing their importance, have them chronicle talents, successes
  - Overall Goals:
    - ❖ Claiming their will and stating strong, value-based preferences
    - ❖ Moving forward with very specific goals, inviting collaboration rather than waiting for something to happen
- In-depth practice of breakthrough coaching by type:
  - Do "fish bowl" exercise:
    - In large group, get sample situation with "type" of employee
    - Facilitator models coaching following tips for coaching by type (someone of that type plays employee)
    - Debrief, answer questions
  - Within teams each participant describes a specific coaching situation and goals.
  - Participants alternate as "coach" in teams, receiving feedback from each other for each round and from the facilitator to the degree possible (facilitator will be overseeing all teams); observers use observation sheet with assigned categories from tips by type.
  - Debrief and discuss in large group.

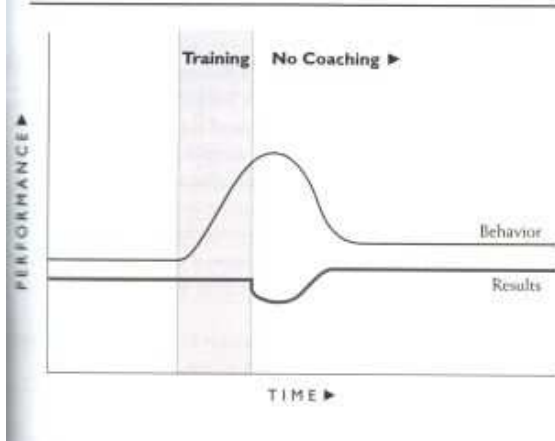
- Show chart from *Heart of Coaching* re: importance of coaching reinforcement:

A. What Should Happen with a New Skill (with Coaching)



Adapted from *Training and Development Journal*, November, 1979.

B. What Actually Happens with a New Skill (Without Coaching)



- Final comments and evaluation