



Miscellaneous Sample Work from Past Clients:

WORKSHEETS & GUIDES



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● The problem...

Lack of time

Little to no self-reflection

Fear of reality

● The solution...

REST & REFLECTION

Individually

Set, talk about, and keep boundaries
Self-reflection practice daily/weekly
Pre-game, post-game, or both

Leaders

Storytelling
Build it into your 1:1s

Companies

Week of Rest
No Meeting Fridays
Meeting maintenance
1:1 questions to encourage self-awareness



● What do you relate to?

- Lack of time
- Little to no self-reflection
- Fear of reality

● Address it individually.

What individual approaches resonate with you?

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● Address it collectively.

What leader-led and company-led approaches resonate with you?

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How to Do
It All Your
Way



Commodity	Price	Change
Gold	\$1,833.400	0.00%
Euro	\$1.20	-0.71%
Yen	¥105.08	+0.05%
Oil	\$56.13	+2.50%

COMMERCIAL SERVICES +24.45%

ELECTRONIC TECHNOLOGY +12.82%

FINANCE +23.63%

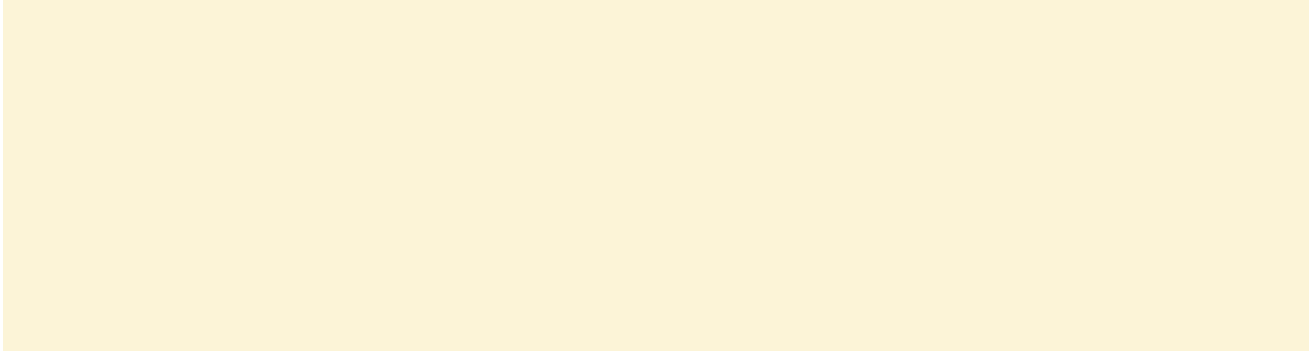
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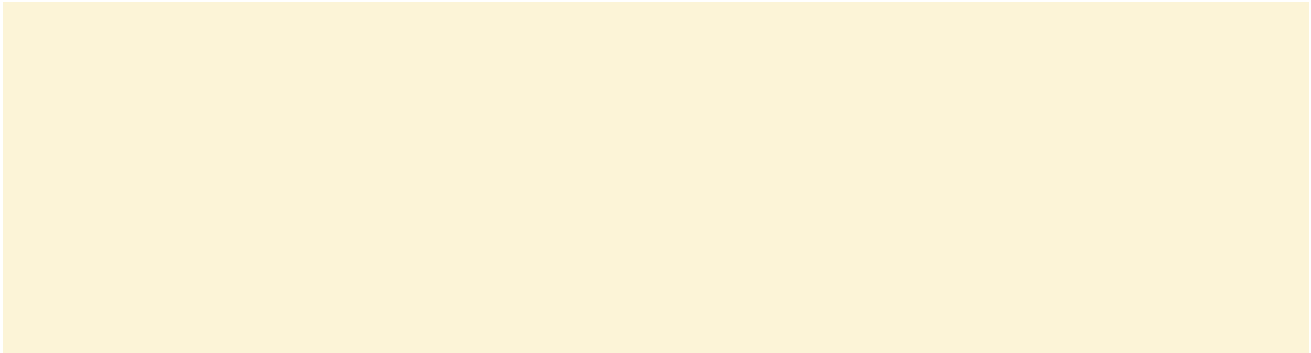
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ME

LEGACY ME

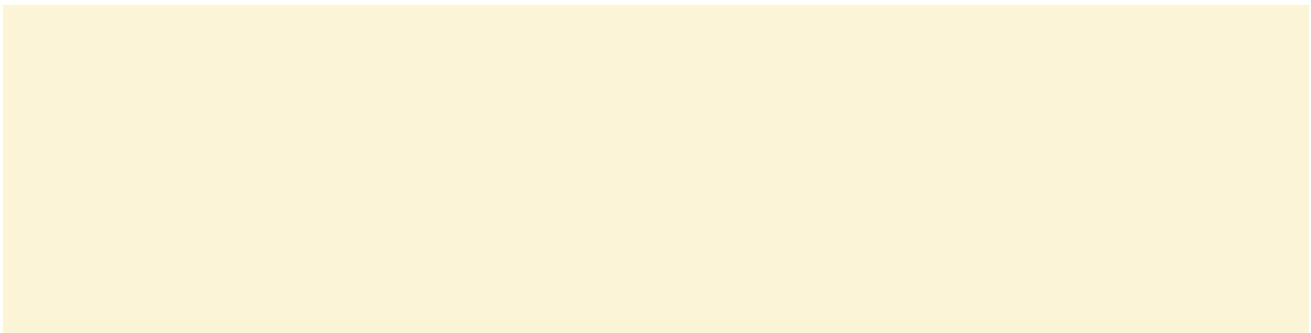
1: The unique value I bring to this world is... (value statement)



2: What is my "why"? (purpose statement)



3: What experiences have I had that support my value and purpose statements?





Preparation Worksheet

Stage 3: Preparation



What are some changes that you are beginning to consider?

What are your goals with making these changes? Make sure these are SMART.

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KEEP AN EYE OUT...

Throughout this facilitator's guide, you will see the following icons. They're there to help you!



Facilitator tips, expert advice



Suggestions on what to say/ask



What Strength you're building



If you see this symbol, or ANY underlines, click to open the link!

I'm a certified Strengths Coach for the CliftonStrengths assessment by Gallup. Ready to get data to understand yourself and others better? Let me know!

FEEDBACK IS VALUABLE.

66% of employees feel the traditional review interferes with their productivity, with 65% saying the review isn't relevant to their jobs.

Managers don't like annual reviews either, with 95% saying they are dissatisfied with their current system.

But, despite it's poor reputation, the majority of organizations still follow an "annual performance review process." Knowing that we can't change this overnight, let's reflect on the value of good feedback for a little motivation...

I'm sure you can think of a time when you received, or conducted, a performance review that was awkward or not enjoyable. Why do you think that was? (Be specific)

Consider just one of the above reasons.

What could be done to counteract that?

What can you personally do to shift the outcome?



ANALYTICAL

By analyzing the past, deconstructing it, and searching for solutions, the *Analytical* strength will improve future outcomes. The key: Slow down to consider the WHY.

In an ideal situation, what would be the most valuable aspects of a performance review??

Since you asked, here's my two cents...the value of check-ins is that they give the opportunity to discuss performance gaps, address trends in performance, recognize high performance, and align the employee's performance (and engagement) to the team, the leader (you!), and the organization.

Consider what you found valuable in performance check-ins. What specific steps can you take to incorporate these into planning for, conducting, or reinforcing your mid-year review?



CONDUCT 1:1 DISCUSSIONS.

"IDEAS ARE YESTERDAY, EXECUTION IS TODAY AND EXCELLENCE
WILL SEE YOU INTO TOMORROW."

JULIAN HALL

You've been thoughtful on your own preparation and now comes the good part. The tone you set in this meeting can sway your relationship with the employee, their productivity, and their retention. You get to determine if that's to the positive or negative.

KICK-OFF

Let's view this meeting less as a chore and more as a gift of time where you can really connect with each employee to help them maximize their impact individually and collectively.

Reinforce your positive tone with the invitation.

Then start the meeting reiterating the approach and asking, "What else do you hope to accomplish or address today?"



LET THE INVITE SPEAK.

Choose messaging that speaks to the positive tone you've set:

- **Title** the meeting "Future Success (aka Review)"
- **Calendar body:** Include a special note indicating how you'd like them to prepare, how you're viewing this time together and what you'd like the next steps to be.



STAY FOCUSED

It's pretty easy to go down a rabbit hole of chatter and find yourself at the end of the meeting, not having covered your most important ideas. This meeting is about connection, so engage quickly and efficiently without losing focus on your "must share" topics.

One way to do this is by not reading what you wrote.

Must Shares: Before the meeting, prepare a list of 3-5 bullets for each employee of points that you want to be sure to address. Suggestions:

- Ideas for their development.
 - **Experience:** Give them a chance to lead a project, serve on a committee or learn from an applicable event.
 - **Exposure:** Shadowing, observing or even having a conversation with you where you share your thinking and approach to an issue or project.
 - **Education:** formal or informal training
- Ask their view of how the organization is doing to engage its employees.