

Leadership Check-in

Communicating and Building Trust





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This workbook is assigned to FQN Leader

(FQN Leader's name here)

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Congratulations FQN Leader!!

You have successfully demonstrated the skills and competencies associated with **Communicating for Leadership Success** and **Building and Sustaining Trust**! You are well on your way to conquering the Leadership Training Essentials!

However, passing the classes and demonstrating the skills is one thing, but *practicing* these skills and *applying* them **every day** is not only **vital for your continued development**, but **essential for the development of your teams** as well. To this end, each FQN Leader (managers included) will be practicing using these skills for further development and continued improvement.

Why? Well, we all know that the more we practice something the better we become at it. Practicing the **Interaction Guidelines** and **Key Principles** is no different. Let's briefly review some of the **benefits** of this practice to *you* as an FQN Leader:

- Prepares you to **handle challenging workplace discussions**.
- Increases likelihood of **applying new skills**.
- *Builds* **competence** and *develops* **confidence** in using the skills.
- **Identifies areas for development**.
 - Helps you **identify what you do well** and what you **could do more effectively**.
 - You can address your areas for development by **receiving feedback** on your use of the Interaction Essentials and by **watching others** use the skills.
- Provides the opportunity **to learn in a safe environment**.
 - You can **experiment** using a variety of best practices.
 - You can **learn from your peers and platform managers**.

...want me to go on? Needless to say, practice is important and there are **limitless benefits** to your application of the skills you will be using every day.

Our **goal is to strengthen you and your team** to enhance these skills for **cohesive teamwork, open communication, sustained trust and reliability, effective developmental feedback, and unrivaled efficiency**. Ask yourself these questions:

- How much more *effective* would your team be with this type of environment?
- How much more *enjoyable* would your shift be if these were a normal, everyday occurrence?

Together we will be building that environment—the environment where each of us looks forward to coming to work every shift, feels pride in our business and business goals, and has confidence in the products we produce.

****There are two parts to this workbook. Once you reach the “STOP” page and have completed everything up until that point, schedule a meeting with your manager to continue together ****

KEY PRINCIPLES AND THEIR EVERYDAY USE

Every time you interact with someone there are **personal needs** present that may need your attention.

What are **personal needs**? **Personal needs** are the individual needs of the people around you. Here are some examples to help put it into perspective. **The need to...**

- Be **heard** and **understood**
- Feel **valued**
- Build positive **relationships**
- Have **pride** in the workplace
- Be included in **decisions**
- Express feelings in a **safe environment**
- Be **included** in the overall picture
- Feel like they **contribute**

The list goes on and on. You may not be able to recognize them right away, but that is why it is important to consistently be aware of your fellow team members. Through practice, not only will recognizing **personal needs** be second nature, but it will also be building a **stronger team**.

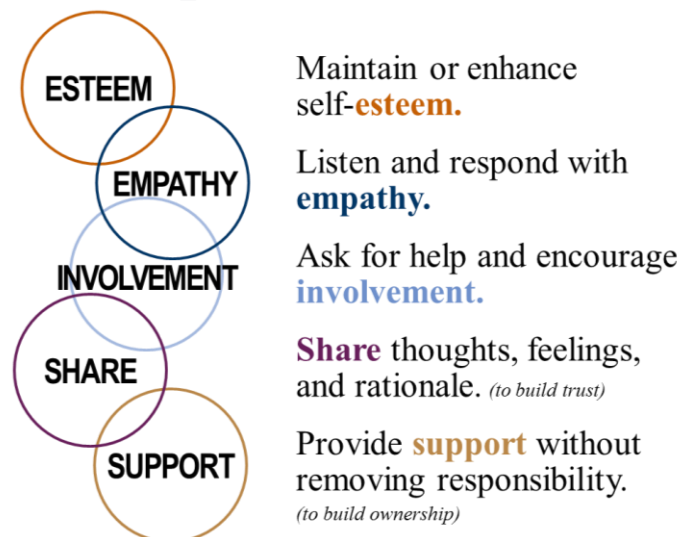
It is your job as an **FQN Leader** not only to be able to **recognize these needs** but to also **address these needs** accordingly with the right **Key Principles**.

Why is this important?

Because when you meet the personal needs of those you work with you are creating an environment for...

- **open communication**,
- more efficient **team work**,
- **trust** in your team members,
- more **innovative ideas**,
- **confidence**,
- **cohesive** work environment.
- **So much more!!**

Key Principles *(to meet personal needs)*



Take a moment to **consider the different Key Principles** from the CLS class and then **complete the activity on the next page**.

When you see a fellow team member in need, what do you do? Imagine one of your team members having the **personal needs** below. Write in the **Key Principle** you would use to address the **need** and then **explain why** this **Key Principle** would be effective.

Needs of a team member

Addressing those needs

1. The need to **be heard and understood**

Key Principle: _____

I would use this key principle because...

2. The need to **see a different perspective**

Key Principle: _____

3. The need to **be included in decisions**

Key Principle: _____

4. The need to **know you have their back**

Key Principle: _____

5. The need to **feel valued**

Key Principle: _____

STAR FEEDBACK REVIEW

In the Communicating for Leadership Success (CLS) course we talked about the importance of providing **effective feedback** as an FQN Leader. What are the components of positive and developmental feedback?



Fill out the below STAR components



Effective Feedback



Diagram of a blue STAR. The top point is labeled "ST". The bottom-left point is labeled "A". The bottom-right point is labeled "R".



Diagram of an orange STAR. The top point is labeled "ST". The bottom-left point is labeled "AR". The bottom-right point is labeled "AR".

Seeking Feedback

An EQN leader must be able to **provide meaningful feedback** as well as **be willing to receive feedback**. This feedback can come from managers, peers, other team members, direct reports, and many other people. **Actively seeking feedback** is not difficult if you determine who you want to talk with and what kind of feedback you need. You might want to seek feedback after situations like these:

- **At the end of a coaching talk-** to see if the guidance you provided met the person's needs.
- **When you offer an idea, suggestion, or solution-** to evaluate the appropriateness of the information as well as the approach you used in presenting it.
- **After you have assigned a new task to a team member-** to see if you provided the appropriate information and offered the support the team member needed.
- **At the end of a review-** to ask what you should start, stop, and continue doing.
- **After leading a meeting-** to see if the participants felt they had been heard and involved throughout the meeting.

Feedback Planner

On the following page is a **Feedback Planner** to prepare for seeking feedback. It will help you to **focus on specific information** you would like to receive from the other person as well as **help you evaluate** what you did well or ways you need to improve. But first, let's consider some important aspects of the **key principles** when it comes to receiving feedback.

- **Esteem:** Remember that the person giving you feedback has feelings too. You can help the person feel good about giving feedback by receiving it with respect and appreciation.
- **Empathy:** Observe the feedback provider's body language to pick up subtle clues about how he or she is feeling. Is the person hedging? Does he or she seem nervous? What can you do to relate to these feelings? How can you make the person feel more comfortable?
- **Involvement:** When receiving feedback, consider what help you might need from this person in the future. Would the person's continued support, advice, or coaching be helpful?
- **Share:** Did this feedback surprise you? Do you disagree with it? Would it help the feedback provider to know how you're feeling?
- **Support:** When you receive feedback, it's important to identify and ask for the support you need. The feedback provider might be the best person to offer you guidance or support. Just remember that it's still your responsibility to act on the feedback.



Fill out the "Information I need" and "Key Principles" sections on the next page and then **ask for feedback** from a team member. When finished, **answer the questions** on the planner to help figure out **what you did effectively** and **what you could do more effectively** next time.

Situation: _____ Date: _____

From whom am I seeking feedback? _____

Information I need

-
-
-

Key Principles

- ☐ **Esteem**
 - Be specific and sincere.
- ☐ **Empathy**
 - Describe facts and feelings.
- ☐ **Involvement**
 - Unleash ideas with questions.
- ☐ **Share**
 - Disclose feelings and insights to build trust.
- ☐ **Support**
 - Specify the level of support you'll provide.

For positive feedback, I'll ask these questions:

What did I say or do that was effective?

Why was it effective?

For developmental feedback, I'll ask these questions:

What did I say or do that was ineffective?

Why it was ineffective?

What can I say or do in the future that would be more effective?

Why would it be more effective?

Star Feedback Practice

Part of your follow-up coursework from your *Communicating for Leadership Success* class was to complete **three STAR feedback forms**. Review below as a refresher on what this feedback looks like.

Remember, effective feedback is **timely, balanced, and specific**.

Timely

- Timely **positive** feedback strongly reinforces positive actions and results
- Timely **developmental** feedback provides suggestions soon enough for people to adjust and enhance their performance

Balanced

- If your feedback focuses only on what a person needs to **do better** or **more of** but fails to acknowledge what's been **done well** damages self-esteem.
- Feedback from leaders who comment **only** on **strong performance** is equally ineffective. They're missing opportunities to help people become even more successful.

Specific

- Tell people **what** they accomplished—or didn't accomplish—in precise, measurable terms. Comparing specific data to targets shows if people are on target or if they need to make adjustments.
- Describe **how** the person achieved the results. What actions did they take? What company values did he/she support? What methods were effective?
- Explain **why** the person's actions were effective. What were the results? How did the person respond? What were the outcomes?

STAR FEEDBACK FORMS

An easy way to remember to give complete, specific feedback is to use the acronym **STAR**. You can use this approach to give two types of feedback: **positive**, which specifies what a person or team has done well, and **developmental**, which guides a person or team toward a more effective approach.

If needed, refer to your CLS course journal on page 31 for an example of this use or review the process with your manager for extra coaching.



ST—Situation or Task. What was the problem, business opportunity, challenge, or task?

A—Action. What was said or done to handle or respond to the situation or task?

R—Result. What happened, for better or worse, because of the person's or team's actions, and what was the impact or consequence of that result?

OR, add on another **AR (action and result)** for developmental feedback...

Alternative Action—Something the person or team could have said or done differently, and

Alternative Result—the result that the alternative action might have produced. This could also be referred to as an enhanced result.



Tip: When you are providing developmental feedback, consider **asking** the person or team how they might have approached the situation differently. Often times, **seeking alternatives is more effective** than simply telling the person or team what they could have done differently. It lets them come to their own conclusions. If they do not come up with something right away, you may need to provide a little **coaching** to push them in the right direction.



Complete the following **three STAR feedback forms**. When you have finished, **deliver your feedback** in person and then **reflect on your experience** using the Feedback Questions.

STAR Feedback Form 1

Name:

Date:

Situation or Task

| Action | | Result | |
|-----------------------------------------------------|--|-----------------|--|
| A C T U A L | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Action | | Enhanced Result | |
| A L T E R N A T I V E | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Feedback Reflection 1

Immediately after you deliver your feedback, **reflect** on the interaction and **answer the following questions** about how you feel the entire scenario went.

What kind of feedback was it? (pick one)

- ☐ This feedback was **positive** with no added developmental suggestions
- ☐ This feedback was **developmental** to help improve performance

How did you do?

List or describe five things you did well

1.

2.

3.

4.

5.

List or describe five things you could improve upon

1.

2.

3.

4.

5.

What was your overall **feeling** on how this interaction went?

STAR Feedback Form 2

Name: Date:

Situation or Task

| Action | Result |
|-----------------------------------------------------|-----------------|
| A C T U A L | |
| Action | Enhanced Result |
| A L T E R N A T I V E | |

Feedback Reflection 2

Immediately after you deliver your feedback, **reflect** on the interaction and **answer the following questions** about how you feel the entire scenario went.

What kind of feedback was it? (pick one)

- ☐ This feedback was **positive** with no added developmental suggestions
- ☐ This feedback was **developmental** to help improve performance

How did you do?

List or describe five things you did well

1.

2.

3.

4.

5.

List or describe five things you could improve upon

1.

2.

3.

4.

5.

What was your overall **feeling** on how this interaction went?

Name: _____ Date: _____

Situation or Task

| Action | Result |
|-----------------------------------------------------|-----------------|
| A C T U A L | |
| Action | Enhanced Result |
| A L T E R N A T I V E | |

Feedback Reflection 3

Immediately after you deliver your feedback, **reflect** on the interaction and **answer the following questions** about how you feel the entire scenario went.

What kind of feedback was it? (pick one)

- ☐ This feedback was **positive** with no added developmental suggestions
- ☐ This feedback was **developmental** to help improve performance

How did you do?

List or describe five things you did well

1.

2.

3.

4.

5.

List or describe five things you could improve upon

1.

2.

3.

4.

5.

What was your overall **feeling** on how this interaction went?

INTERACTION GUIDELINES AND DISCUSSIONS

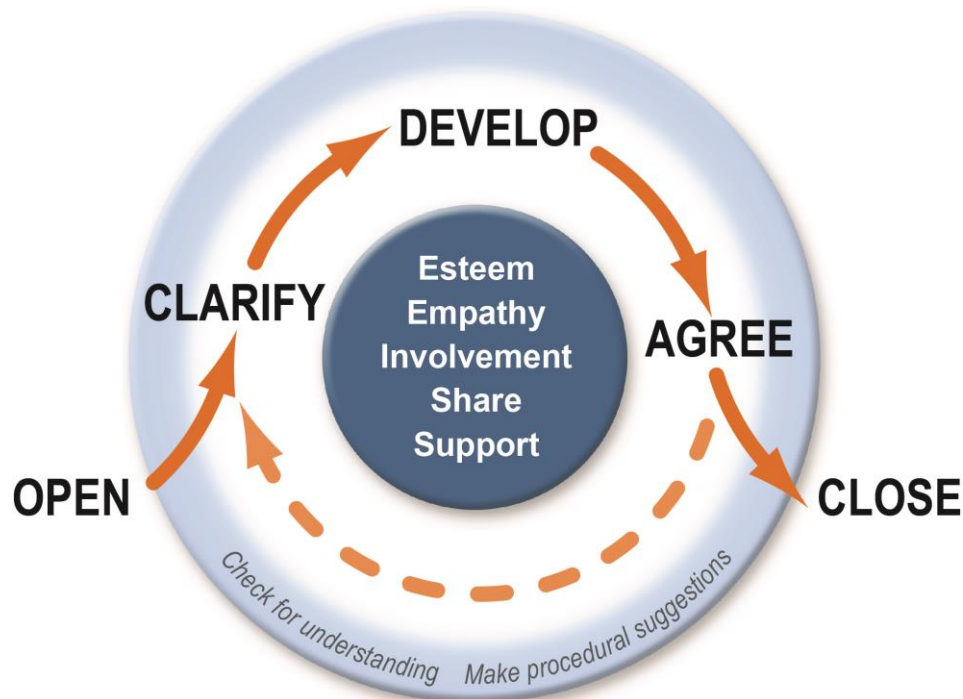
We have talked a lot about the **Key Principles** and their **everyday use** to meet **personal needs**, but part of your development as a leader is to use these principles in your **everyday discussions** to meet **practical needs** as well. The below model is called the **Interaction Essentials** and breaks down what an effective and mutually beneficial discussion should look like.

The structure for an effective discussion follows basic guidelines called the **Interaction Guidelines**—these are **open, clarifies, develop, agree, and close**. These guidelines provide the path to follow in the **Interaction Essentials** to meet **practical needs**.

You will notice that there is more to the structure for an effective discussion than the **Interaction Guidelines**. At the center of **Interaction Essentials** are the same **Key Principles** we have been practicing. This is because even though our goal in a discussion may be to meet **practical needs**, we still need to recognize and respond to **personal needs** by utilizing our **Key Principles**.



Take a moment to **review the Interaction Essentials model** and then **answer the questions** on the next page. You can use your course journal or job aid from your CLS class if needed.



Interaction Guidelines Breakdown

What is the **goal or purpose** of each of the following **Interaction Guidelines**?

Open: _____

Clarify: _____

Develop: _____

Agree: _____

Close: _____

Key Principle Use

Think of a time you needed to have a discussion with a coworker. For that discussion, what **key principles** did you use or which could you have used in the different **Interaction Guideline** phases?

Check the box next to the **principle(s)** you would have used, and then **explain why**.

Open: ☐ Esteem ☐ Empathy ☐ Involvement ☐ Share ☐ Support

Clarify: ☐ Esteem ☐ Empathy ☐ Involvement ☐ Share ☐ Support

Develop: ☐ Esteem ☐ Empathy ☐ Involvement ☐ Share ☐ Support

Agree: ☐ Esteem ☐ Empathy ☐ Involvement ☐ Share ☐ Support

Close: ☐ Esteem ☐ Empathy ☐ Involvement ☐ Share ☐ Support

Discussion Planner Review


The Discussion Planner is a tool designed to help you think through how you'll use the **Interaction Essentials** to meet people's **personal** and **practical needs** during an interaction.

The planner provides prompts to help you:

- Decide which **Key Principles** you'll focus on and determine your approach to the discussion.
- Prepare what you'll say at each stage of the **Interaction Guidelines**, including how much time you expect to spend on each step.
- Provide **feedback** to yourself after the discussion.
- **Prepare for and conduct discussions** in the workplace

Have you already been doing this on the line or will this be your first discussion planner?

Place an **"X"** in the table below to indicate where you currently stand and then use a **"+"** or **"-"** sign to signify how the discussion went (**positive "+"** or **negative "-"**).

| Plan to Use It! | Used It! | Result (+ or –) |
|-----------------|----------|---------------------------------------------------------------------------------------|
| | |  |

If you **have used** the Discussion Planner, how did it go? Write a brief description of the situation and its resulting impact.

If you **have not** used it yet, what was preventing you? Write a brief description of how you could use a discussion planner for future discussions.

Let's break these down to review the different sections of the planner before we begin our practice.

| DISCUSSION PLANNER | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Discussion with: <u>Roger Harris</u> Date: <u>July 30</u> | | |
| Topic/Issue to discuss: <u>Discuss performance issue with Roger—his reject rate has begun to exceed target.</u> | | |
| Key Principles (to meet personal needs) | | |
| <input checked="" type="checkbox"/> Esteem <ul style="list-style-type: none">Be specific and sincere | MY APPROACH What are my objectives for this discussion? <i>Find out why this is happening and what help is needed to correct the problem. Emphasize impact on quality, productivity, coworkers.</i> How will I know I've accomplished these objectives? <i>Set improvement goals and follow-up dates. Task is accomplished when Roger's rate consistently meets target.</i> What personal needs of the person/team do I need to consider? <i>Roger is usually conscientious about his work and resistant to feedback. Ask why quality of his work is now inconsistent and what I can do to help.</i> | |
| <input checked="" type="checkbox"/> Empathy <ul style="list-style-type: none">Describe facts and feelings | | |
| <input checked="" type="checkbox"/> Involvement <ul style="list-style-type: none">Unleash ideas with questions | | |
| <input type="checkbox"/> Share <ul style="list-style-type: none">Disclose feelings and insights to build trust | | |
| <input type="checkbox"/> Support <ul style="list-style-type: none">Specify the level of support you'll provide | | |
| Interaction Guidelines (to meet practical needs) | | |
| Time | | |
| <input type="checkbox"/> 1. OPEN <ul style="list-style-type: none">Describe purpose of discussionIdentify importance <i>Purpose: Reject rate above target past two weeks. Need to identify causes and corrective action.</i> <i>Importance: Affects quality, productivity, costs, coworkers.</i> | <input type="checkbox"/> Make procedural suggestions <input type="checkbox"/> Check for understanding | |
| <input type="checkbox"/> 2. CLARIFY <ul style="list-style-type: none">Seek and share information about the situationSeek issues and concerns <i>Before past two weeks, Roger consistently met or exceeded this target. Ask what is causing decline in quality of his work. Provide examples of issues caused by higher reject rate.</i> | <input type="checkbox"/> Make procedural suggestions <input type="checkbox"/> Check for understanding | |
| 3. DEVELOP <ul style="list-style-type: none">Seek and discuss ideasExplore needed resources/support <i>Ask Roger what he can do to get back to meeting target. What can I do as his leader to help him improve his performance?</i> | | <input type="checkbox"/> Make procedural suggestions <input type="checkbox"/> Check for understanding |
| 4. AGREE <ul style="list-style-type: none">Specify actions, including contingency plansConfirm how to track progress and measure results <i>Agree on how we'll monitor progress. May need to monitor his work and reject rate more closely.</i> <i>Agree on specific steps that Roger must take to improve the situation.</i> | | <input type="checkbox"/> Make procedural suggestions <input type="checkbox"/> Check for understanding |
| 5. CLOSE <ul style="list-style-type: none">Highlight important features of planConfirm confidence and commitment <i>Review steps we agree on, including how we'll follow up to check on status of problem and resolution. Remind Roger that he is a valuable member of the team and that I want him to continue to be successful.</i> | | <input type="checkbox"/> Make procedural suggestions <input type="checkbox"/> Check for understanding |
| Post-Discussion Notes | | |
| <ul style="list-style-type: none">What did I say or do to use the skills effectively? <i>I clarified the situation and its impact on the business and coworkers.</i>What could I say or do to use the skills more effectively next time? <i>I could ask Roger to summarize what we've agreed to and how we'll monitor progress.</i> | | |

Key Principles

In the key principles section think about the other person's personal needs and what Key Principles would best address those needs. While all the Key Principles are important to use, specific Key Principles might be more appropriate for certain kinds of interactions.

In this example, an employee is not meeting production goals. What Key Principles would be best to focus on when discussing the issue to help improve performance? The answer may be **esteem**, **empathy**, and **involvement**. If this is the case, you would mark these principles on the planner.

If this was a discussion about delegating a task, you may want to focus on **involvement**, **share**, and **support**. Each discussion will have different Key Principles you will want to focus on according to your unique audience and situation.

Key Principles *(to meet personal needs)*

- ☒ **Esteem**
 - Be specific and sincere
- ☒ **Empathy**
 - Describe facts and feelings
- ☒ **Involvement**
 - Unleash ideas with questions
- ☐ **Share**
 - Disclose feelings and insights to build trust
- ☐ **Support**
 - Specify the level of support you'll provide

Plan Your Approach

The questions in this section help you to **outline your approach**—your objectives for the discussion, how you'll know whether you've accomplished them or not, and what personal needs of the person or team you'll need to consider.

MY APPROACH

What are my objectives for this discussion?

Find out why this is happening and what help is needed to correct the problem. Emphasize impact on quality, productivity, coworkers.

How will I know I've accomplished these objectives?

Set improvement goals and follow-up dates. Task is accomplished when Roger's rate consistently meets target.

What personal needs of the person/team do I need to consider?

Roger is usually conscientious about his work and resistant to feedback. Ask why quality of his work is now inconsistent and what I can do to help.

Open

The next part of the Discussion Planner is **the Interaction Guidelines** section.

The planner lists each Interaction Guideline along with **prompting questions** that are specific to the type of discussion you're planning (coaching, resolving conflict, change, delegating, etc.). This planner can be used for any type of discussion, so there are no specific prompts. In future courses you'll see these prompting questions on course-specific **Discussion Planners**.

The first Interaction Guideline is **open**. Here you see the leader wrote some quick points (**in blue**) to be covered with the audience.

| Interaction Guidelines <i>(to meet practical needs)</i> | |
|---------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time | |
| <input type="checkbox"/> | 1. OPEN <ul style="list-style-type: none">Describe purpose of discussionIdentify importance <p><i>Purpose: Reject rate above target past two weeks. Need to identify causes and corrective action.</i> <i>Importance: Affects quality, productivity, costs, coworkers.</i></p> |
| <input type="checkbox"/> | Make procedural suggestions |
| <input type="checkbox"/> | Check for understanding |

Clarify

After you state the purpose, you need to **clarify** the situation. Facts and figures are key to building a complete picture of the situation; and asking questions helps you learn more and avoid making assumptions.

It is easy to skip the clarify step and jump to developing solutions before you have all of the facts. But this is an important step that should *not* be left out so the **whole picture is put into perspective**.

This also gives your audience a chance to voice any grievances and feel “heard” before you work together on a solution. You should **present a lot of questions** to your audience in this step to **clarify**.

| Interaction Guidelines <i>(to meet practical needs)</i> | |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | 2. CLARIFY <ul style="list-style-type: none">Seek and share information about the situationSeek issues and concerns <p><i>Before past two weeks, Roger consistently met or exceeded this target. Ask what is causing decline in quality of his work. Provide examples of issues caused by higher reject rate.</i></p> |
| <input type="checkbox"/> | Make procedural suggestions |
| <input type="checkbox"/> | Check for understanding |

Develop

After there is a clear understanding of why you are holding the discussion and what the scenario you are discussing is about, it is time to **develop** a solution. Your responsibility as a leader is to seek and discuss different ideas with your team member—not provide them. It is crucial that during this step you **listen** and **engage** your team member with questions.

As you prepare for this section, **note reminders** on how you'll do this during your discussion.

Interaction Guidelines *(to meet practical needs)*



3. DEVELOP

- Seek and discuss ideas
- Explore needed resources/support

- ☐ Make procedural suggestions
- ☐ Check for understanding

Ask Roger what he can do to get back to meeting target. What can I do as his leader to help him improve his performance?

Agree

When you prepare for a discussion, write reminders for this step. Your **agree** notes, however, will depend on the results of the **develop** guideline.

As you can see on the sample Discussion Planner, there is a reminder to agree with Roger on how to monitor progress. This is just as important as agreeing on what steps to take. **Making notes** like this as you prepare will help you have an **effective discussion**.

Interaction Guidelines *(to meet practical needs)*



4. AGREE

- Specify actions, including contingency plans
- Confirm how to track progress and measure results

- ☐ Make procedural suggestions
- ☐ Check for understanding

Agree on how we'll monitor progress. May need to monitor his work and reject rate more closely. Agree on specific steps that Roger must take to improve the situation.

Close

The last Interaction Guidelines is **close**. Use this step to **highlight important features** of the plan and to **confirm confidence** and **commitment**. **Notes in this section** are extremely helpful to remind your team member that you will follow up with the issue. It is also a great time to **assure your team member** that he or she is a valuable member of your team and that you are confident he or she will succeed.

As you're closing the discussion, review your **My Approach** section from the beginning to ensure you have met your objectives. If you haven't, then go back to the **develop** section and cover anything you may have missed.

Interaction Guidelines *(to meet practical needs)*



5. CLOSE

- Highlight important features of plan
- Confirm confidence and commitment

☐ Make procedural suggestions☐ Check for understanding

Review steps we agree on, including how we'll follow up to check on status of problem and resolution. Remind Roger that he is a valuable member of the team and that I want him to continue to be successful.

These **Interaction Guidelines** are skills that help you to **meet the practical needs** of the interaction and **communicate efficiently** in your interactions. But there are a few things you need to keep in mind while doing so—make **procedural suggestions** and **check for understanding**.

Throughout your discussion, you will need to ensure that everyone understands what's been said or agreed to and keep the discussion moving forward. To do this, you must:

1. **Constantly check for understanding:** "Does this make sense?" or "What questions do you have about what we just talked about?"
2. **Make procedural suggestions:** "Is there anything we need to discuss on this point or can we move on to the next?" or "I think we agree on where we stand with this issue, is it ok if we move on to the next?"

Remember—You will need to constantly consider the **personal needs** of your team member. Ask yourself throughout the discussion, "How am I building or maintaining **esteem**? How can I **empathize** with their current situation? How can I get them more **involved**? What experience can I **share** to help our discussion? How can I provide **support** for future actions?"

Discussion Planner Practice

Now that we have reviewed the discussion planner process, it is time to put it into practice.

Q: “Why do we need to do this again? I’ve already done a discussion planner—we had a class on it.”

A: “Well, this is true, but if you don’t practice it you will most likely forget how to do it.”

Q: “Ok... so how does this benefit me? Why would I *want* to remember how to do a discussion planner?”

A: “Because **taking a step back** from your current situation, **organizing your thoughts**, **meditating** on how you want the conversation to go, **writing down examples** and **notes** of what you want to cover, and reminding yourself of the **personal** and **practical needs** of the entire situation **will prepare you for a more effective discussion**.

Your discussions will not only help you to be an **effective leader**, but they will also be giving you the **tools** you need to **develop and strengthen your teams** and **other leaders**. This will help **to create that work environment we all want and need!**”

I hope this helps to answer some of the questions you might have. If you have any others, please feel free to talk to your manager or a member of the training staff. **We want you to grow and succeed!!**



Think about a **current situation** with another team member or leader. Is there something you need to discuss with them? Do you have ideas they could help contribute to? Or is there something they are not handling in the best way?

Take hold of that **discussion idea** and **plan it out using a discussion planner** in the next section.

Select the Key Principles you should focus on, **write out your approach**, and then **take notes** in the **Open, Clarify, Develop, Agree, and Close** sections.

After you have prepared your discussion planner, **meet with your audience and hold the discussion**. When you have finished, **reflect on how you feel the discussion went** in the **Post-Discussion Notes**.

Discussion Planner

Discussion with: _____ Date: _____

Topic/Issue to discuss: _____

Key Principles (*to meet personal needs*)

☐ **Esteem**

- Be specific and sincere

☐ **Empathy**

- Describe facts and feelings

☐ **Involvement**

- Unleash ideas with questions

☐ **Share**

- Disclose feelings and insights to build trust

☐ **Support**

- Specify the level of support you'll provide

MY APPROACH

What are my objectives for this discussion?

How will I know I've accomplished these objectives?

What personal needs of the person/team do I need to consider?

Interaction Guidelines (*to meet practical needs*)

1. OPEN

- Describe Purpose of Discussion
- Identify importance

☐ Make procedural suggestions

☐ Check for understanding

How will I describe the purpose and importance in a manner that shows my concern to the person or team? How will I use Empathy to defuse negative emotions?

2. CLARIFY

- Seek and share information about the situation
- Seek issues and concerns

☐ Make procedural suggestions

☐ Check for understanding

What will I ask to learn more about the situation? What will I say to share my feelings and insights?

3. DEVELOP

- Seek and discuss ideas
- Explore needed resources/support

☐ Make procedural suggestions

☐ Check for understanding

How will I involve the person or team in identifying ways we can build or repair trust? What resources or support might we need? What personal commitment am I willing to make?

4. AGREE

- Specify actions, including contingency plans
- Confirm how to track progress and measure results

☐ Make procedural suggestions

☐ Check for understanding

What might I say to prompt ideas for tracking progress? How will we follow up to ensure we are making progress?

5. CLOSE

- Highlight important features of plan
- Confirm confidence and commitment

☐ Make procedural suggestions

☐ Check for understanding

What might I say to check the person's or team's commitment? How can I express my confidence and my continued commitment to building trust with the person or team?

Post-Discussion Notes

What are **3 things** I did say or do to use the skills effectively?

1. _____

2. _____

3. _____

What are **3 things** I could say or do to use the skills *more effectively* next time?

1. _____

2. _____

3. _____



Stop: Do not continue working past this point—the rest of this workbook is for your **manager's use only**.

Take Action: When you have finished your **three STAR feedback forms, your reflections, and one discussion planner**, **set up a meeting with your Manager** to discuss your work and progress as an FQN Leader.

Bring this workbook with you to your meeting to **discuss your current progress** and **review your next steps** as an FQN Leader.

Manager and FQN Leader Discussion

****The second part of this workbook is for your manager. This will be used to help facilitate you and your manager's discussion on your current progress and your next steps as an FQN Leader ****

KEY PRINCIPLE DISCUSSION

Managers, ask your team member the **following questions** to gain more information about their **key principle** use. Then, **record their responses** in the **space provided** under each question.

Manager: "If you focused on these Interaction Guidelines, how helpful were they in helping you effectively meeting the practical needs of your discussion?"

FQN Leader's Response: _____

Manager: "If they didn't help much, why not?"

FQN Leader's Response: _____

Manager: "What could you be doing more effectively?"

FQN Leader's Response: _____

Manager: "What suggestions do you have for others about how to use these Interaction Guidelines more effectively?"

FQN Leader's Response: _____

STAR FEEDBACK DISCUSSION

Part of your FQN Leader's follow-up coursework was to fill out **three STAR Feedback forms** and then **deliver their feedback** to other employees. After they delivered the feedback, they were to reflect on their experience.

Have your team member explain their **STAR feedback forms** to you and then **review** how they felt their feedback delivery went.

Manager: "Which component of the **STAR forms** did you find easiest to write? Why?"

FQN Leader's Response: _____

Manager: "Were you **unsure about what to write** for any of the components?"

FQN Leader's Response: _____

Manager: "How about the **STAR/ARs**—how are they going?"

FQN Leader's Response: _____

Manager: “How do you think your fellow team members are **receiving** your feedback?”

FQN Leader’s Response: _____

Manager: “What have you noticed as a difference in your team’s **performance** or **morale** as a result of your feedback?”

FQN Leader’s Response: _____

Manager: “Where do you think you need **further development** in your STAR feedback?”

FQN Leader’s Response: _____

[illegible]

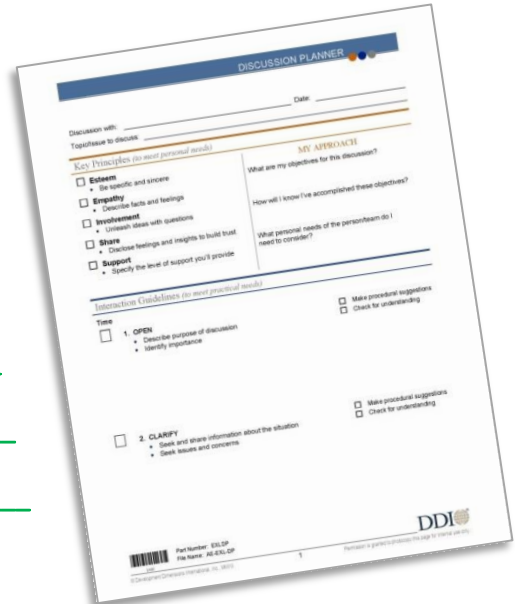
DISCUSSION PLANNER DISCUSSION

Another part of your FQN Leader's follow-up coursework was to fill out a discussion planner in preparation of a discussion with another employee. They were then to conduct this discussion and reflect on their experience.

Have your team member **explain their discussion planner** to you and then review its facilitation.

Manager: "What was the **basic situation** you used your discussion planner for?"

Brief Description: _____



Manager: "What areas did you **focus** on that you thought would be the **most helpful** when you had your discussion?"

FQN Leader's Response: _____

Manager: "How did you **tailor** your discussion planner to the **personal needs** of your audience?"

FQN Leader's Response: _____

Manager: “What **impact** did using the discussion planner have on your discussion?”

FQN Leader’s Response: _____

Manager: “What **solutions** or **tips** would you suggest to people who had a less than positive result?”

FQN Leader’s Response: _____

Manager **notes** and **development Ideas** for *Discussion* improvement

KEY PRINCIPLE PROGRESSION

How does your team member rate themselves in their use of the following key principles? (Place an “X” next to their answer accordingly)

Let’s dig a little deeper. **Ask your team member** the following questions to gain more information about

| | Making progress! | Still challenging! |
|-------------|------------------|--------------------|
| Esteem | | |
| Empathy | | |
| Involvement | | |
| Share | | |
| Support | | |

their **key principle use**. **Record their responses** in the space provided under each question.

Manager: “In the areas you are making progress, what **differences** have you noticed in the **outcomes** of your discussions?”

FQN Leader’s Response: _____

Manager: “For the times you’ve expected a difficult conversation, how did using one or more **Key Principles** help?”

FQN Leader’s Response: _____

Manager: “With the Key Principles you still find challenging, how do you think it is **affecting your team** and **your leadership?**”

FQN Leader’s Response: _____

Manager: What are some ways you can **work to improve** your use of the **key principles?**

FQN Leader’s Response: _____

[illegible]

NEXT STEPS

Briefly recap what you have discussed with your FQN Leader so far about their current progress.

Manager: “Think about what we’ve covered in this activity and some of the ideas and suggestions you’ve received from others. Based on that information, what will you stop, start, or continue doing?”

For example, maybe you haven’t used the Discussion Planner yet and would like to start using it to prepare for your next discussion.

Or, perhaps providing feedback using STAR is starting to produce positive results, and you’d like to continue with it. “

Note their answer in the table below:

| Stop | Start | Continue |
|------|-------|----------|
| | | |

To Close the session...

- Congratulate your FQN leader on the **progress** they’ve made so far.
- Share or identify any additional **follow-up opportunities** or **events** they might be able to or want to take advantage of.
- Challenge them to continue to apply the **skills or techniques** they’ve been practicing.

[illegible]

Team Member Leadership Progression

FQN Leader: _____

FQN Evaluator: _____ Date: _____

Focus/Skills: Leadership Communications

Practical Application Scale

5—Much more than acceptable

4—More than acceptable

3—Acceptable

2—Less than acceptable

1—Much less than acceptable

Discussion Planners: _____

STAR Forms: _____

Adaptability: _____

Initiative: _____

Effectiveness: _____

Key Principle Use

++ Strength

+ Acceptable

— Needs Improvement

-- Less than acceptable

N No opportunity to
demonstrate/observe

Esteem: _____

Empathy: _____

Involvement: _____

Share: _____

Support: _____

FQN Evaluator Signature

[illegible]

[illegible]



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