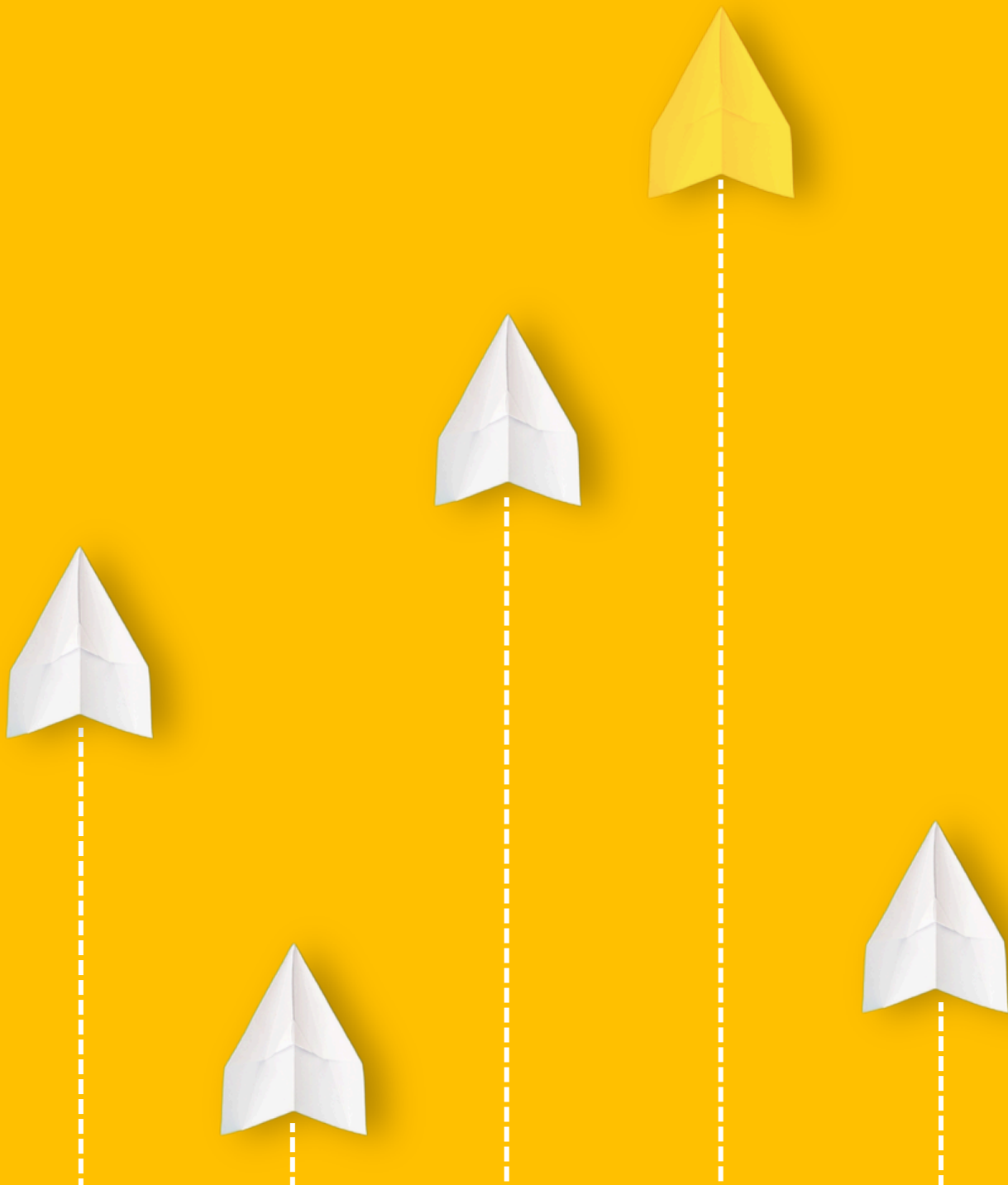


Level-Up™

G R O W T H H U B

Leadership Playbook



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Level-Up

G R O W T H H U B

Level-Up™ Leadership

This package brings together every module in the Level-Up™ Leadership journey! All summaries, frameworks, and tools are included here as quick-reference resources to support learning and practice.

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DiSC® Foundations



Level Summary

- Communication is more effective when you understand your own style and how others see you. Awareness is the first step to influence.
- Each DiSC® style has strengths and blind spots. Dominance drives results, Influence energizes people, Steadiness builds harmony, and Conscientiousness ensures accuracy.
- You can't lead everyone the same way. Tailor how you communicate, motivate, and delegate based on what each style needs most.
- People don't just hear your words—they feel your energy. For some, urgency inspires. For others, reassurance builds trust.
- The goal isn't to change who you are, but to flex where needed. Small adjustments in tone, pace, or approach can transform how your message lands.
- Better conversations aren't about saying more—they're about saying it in the way others best receive it.

Resources

- Overview of DiSC®
- DiSC® for Networking
- Everything DiSC® Email Template



Dominance

Priorities: displaying drive, taking action, challenging self and others

Motivated by: power and authority, competition, winning, success

Fears: loss of control, being taken advantage of, vulnerability

You will notice: self-confidence, directness, forcefulness, risk-taking

Limitations: lack of concern for others, impatience, insensitivity

Active
Fast-paced
Assertive
Dynamic
Bold

influence

Priorities: providing encouragement, taking action, fostering collaboration

Motivated by: social recognition, group activities, friendly relationships

Fears: social rejection, disapproval, loss of influence, being ignored

You will notice: charm, enthusiasm, sociability, optimism, talkativeness

Limitations: impulsiveness, disorganization, lack of follow-through

Questioning
Logic-focused
Objective
Skeptical
Challenging

Accepting
People-focused
Empathizing
Receptive
Agreeable

Conscientiousness

Priorities: ensuring objectivity, achieving reliability, challenging assumptions

Motivated by: opportunities to use expertise or gain knowledge, attention to quality

Fears: criticism, slipshod methods, being wrong

You will notice: precision, analysis, skepticism, reserve, quiet

Limitations: overly critical, tendency to overanalyze, isolates self

Thoughtful
Moderate-paced
Calm
Methodical
Careful

Steadiness

Priorities: giving support, achieving reliability, enjoying collaboration

Motivated by: stable environments, sincere appreciation, cooperation, opportunities to help

Fears: loss of stability, change, loss of harmony, offending others

You will notice: patience, team player, calm approach, good listener, humility

Limitations: overly accommodating, tendency to avoid change, indecisiveness

Adjust your communication style to maximize your relationships. Identify the style of each person in your network and tailor your approach.



Dominance: Bold, Competitive, Direct

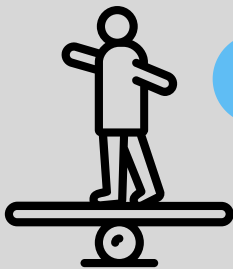
Talk About: The big picture, the bottom line and skip the details

Give Them: Bold ideas that help them win in their space and reap results

Influence: Social, Enthusiastic, Visionary

Talk About: Ideas that innovate, industry trends and thought leaders

Give Them: Enthusiastic collaboration that helps them stand out to others



Steadiness: Stable, Sincere, Patient

Talk About: Their opinions, opportunities to collaborate and ways to include more voices

Give Them: Sincere, trusting sustainable support

Conscientious: Reserved, Critical, Accurate

Talk About: Objective facts & data, expert opinions & emerging research

Give Them: Access to new information and opportunities to be an expert



Want a simple template and example of an email format that works for all of the DiSC® styles?

Review the resource below for ideas on how to draft an email for all DiSC® styles and ensure your message is clear.

New Message

From

To

Subject Follow Up

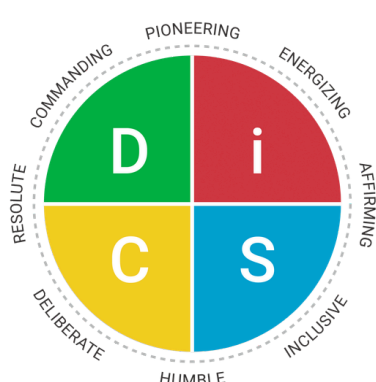
Hello [Name],

I hope you are having a productive day so far! **[Start with a light greeting to set a friendly tone]** I am following up with the information you requested. The deliverable will be ready by Friday and I require the accounting information from you before Wednesday to meet that deadline. **[Clearly and concisely state the important information & call to action up front]** In case you need the details they are highlighted here and attached if needed:

- Point 1
- Point 2
- Point 3

[Provide well-formatted, high level detail if required to perform the call to action and attach details in case they want to review] I appreciate your collaboration on this, let me know if you require anything further on my end. **[End with appreciation and support]**

Chat soon,
[Your Name]



Sans Serif

Send

DiSC® in Practice



Level Summary

- Reading people isn't about labeling, it's about noticing what they need. Every style has strengths and limitations, and everyone is a blend of all four.
- The best clues to someone's style are right in front of you: their body language, tone of voice, and choice of words. Start simple. Ask: Are they fast-paced or reflective? Skeptical or warm? Combine the answers, and you'll have a strong read on their style.
- Communication becomes powerful when you toggle. Adjusting how you show up - whether more direct, more encouraging, or more reassuring - can unlock trust and results.
- Toggling matters most when the stakes are high, time is short, or conflict is brewing. Flexing your approach in those moments prevents friction and builds momentum.
- The real skill isn't knowing DiSC - it's using it. Observe, adapt, reflect, and repeat. Each small adjustment compounds into stronger relationships and smoother teamwork.

Resources

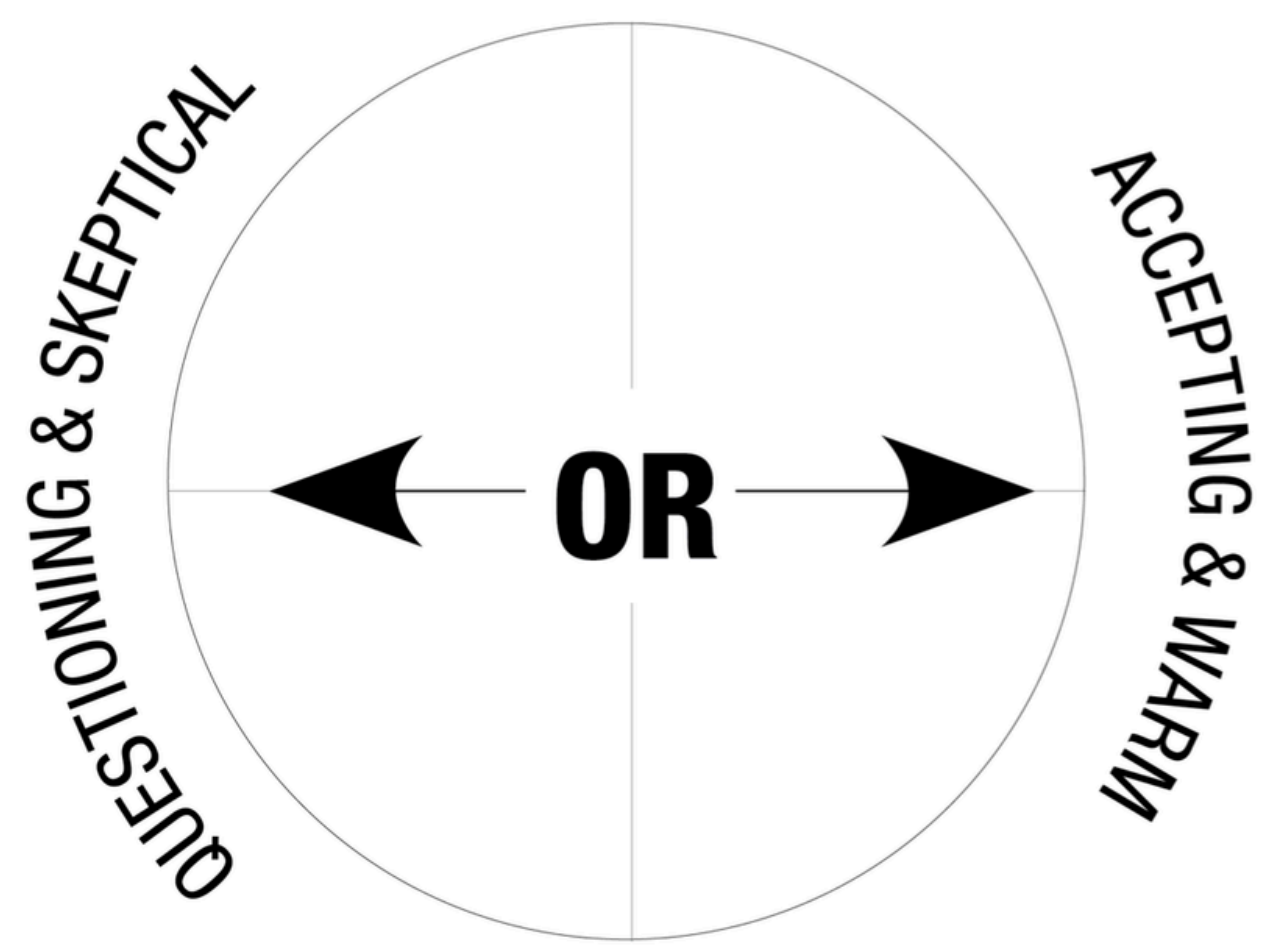
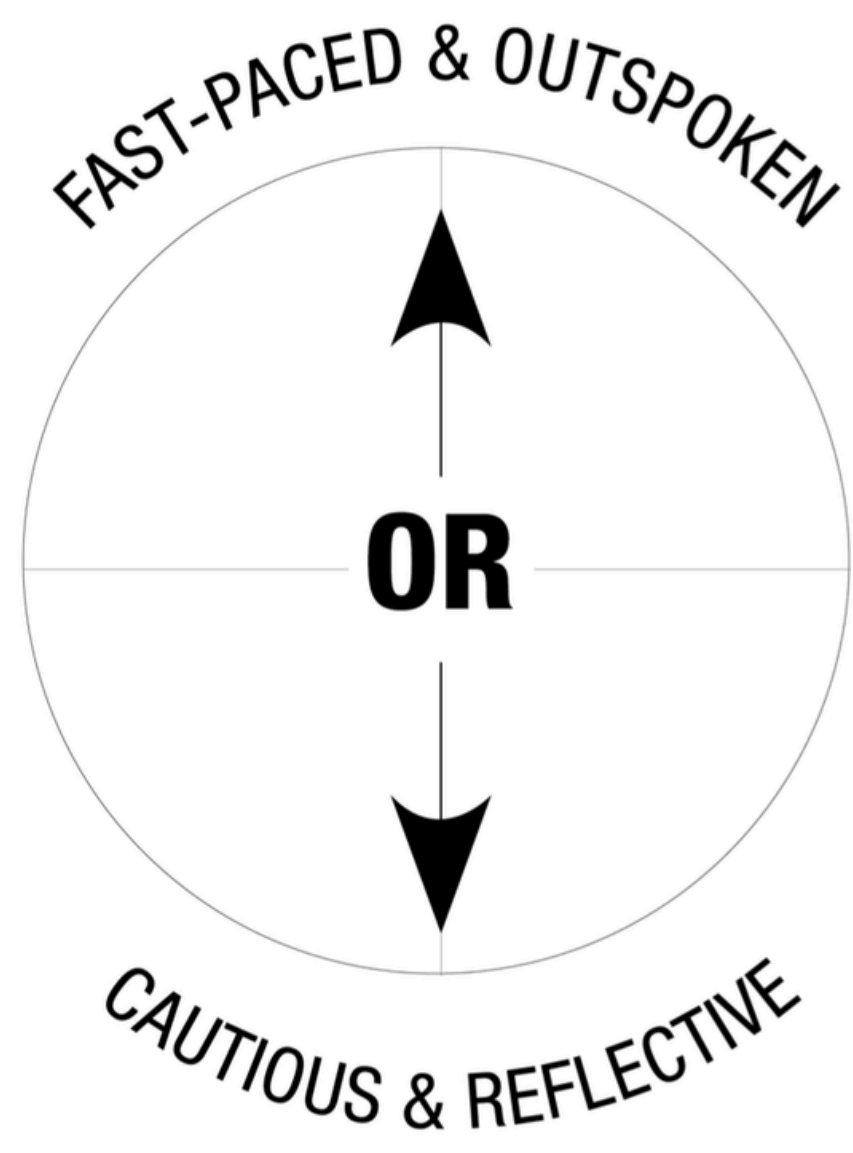
- People Reading Methods



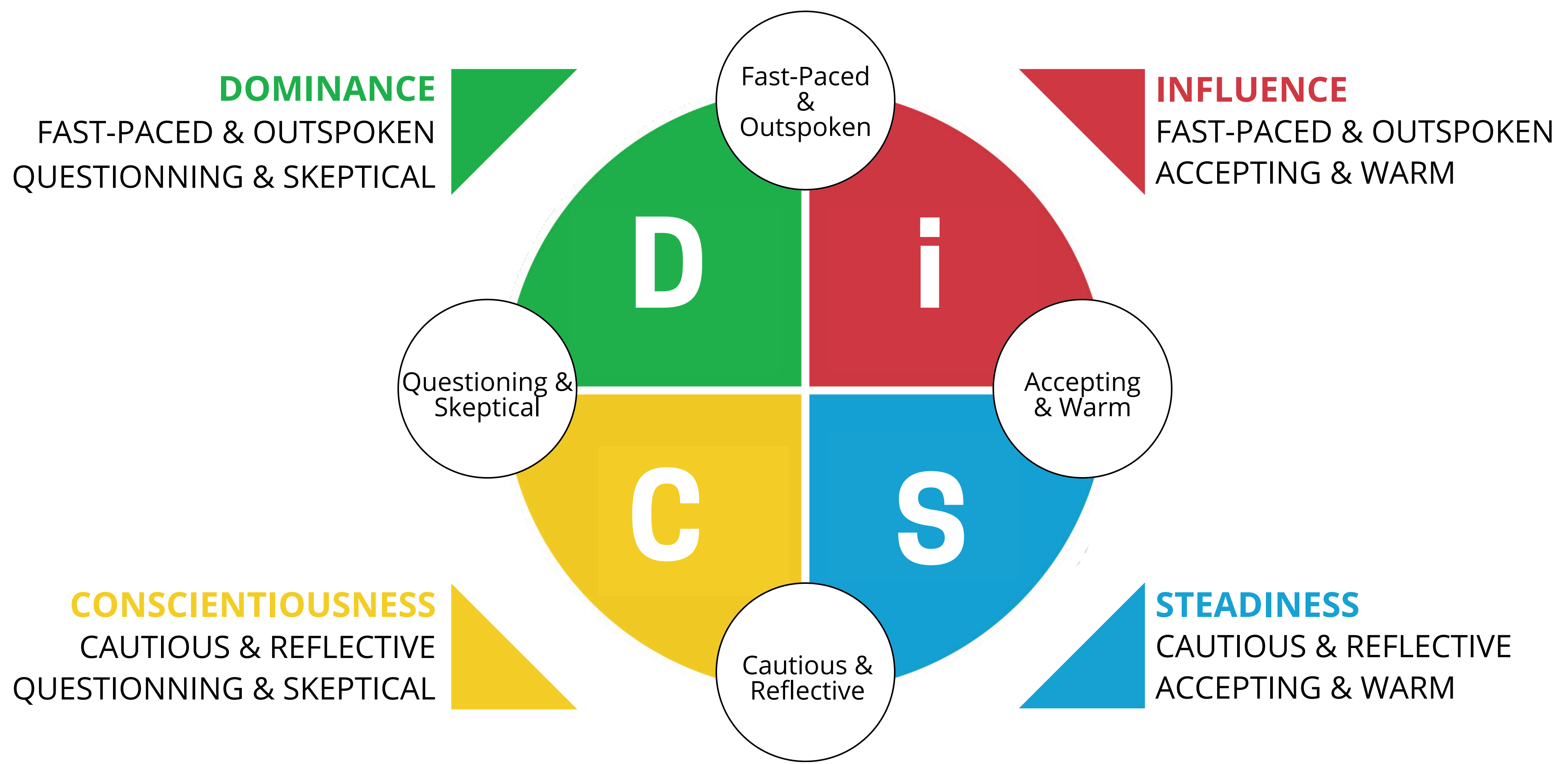
People Reading Methods

People Reading Method: Step One

People Reading Method: Step Two



People Reading Method: Step Three



Foundation of Coaching



Level Summary

- Career development is people development. When you invest in your team's growth, you strengthen the entire organization.
- Motivation thrives when people are challenged and supported. Growth opportunities fuel engagement and productivity.
- Employees drive 90% of their own development. Your role as a leader is to guide, coach, and create space for progress.
- Great coaching conversations follow three steps:
 - Get to know your staff—observe, ask questions, and uncover what fulfills them.
 - Offer your perspective—share honest feedback, highlight gaps, and provide encouragement.
 - Share opportunities—connect people with chances to stretch, learn, and shine.
- You don't need to do everything. Focus on knowing your people, offering insight, and opening doors. The rest is up to them.
- The measure of a great leader isn't their own success - it's how well their team succeeds because of them.

Resources

- Culture Tracker
- Employee Hierarchy of Needs

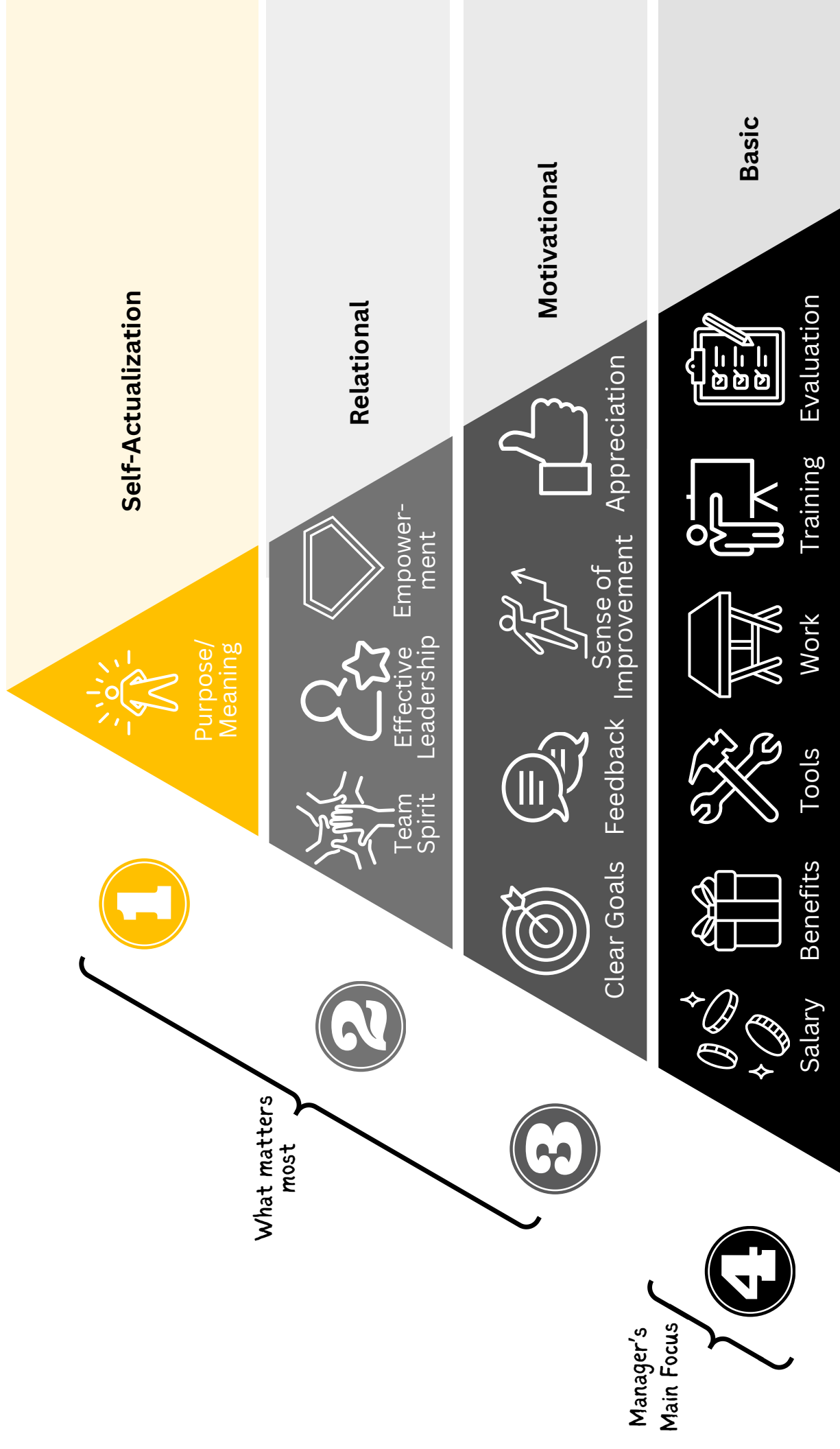


Over the next week, track how many times you actively contribute to an intentional culture. The 6 characteristics of culture with some examples are outlined below to support your reflection. Try to do a few things each day to build a strong culture.

CULTURE CHARACTERISTIC	M	T	W	T	F
<p>Shared Vision <i>Examples: Asked a team member about their goals; mentioned organizational strategy in a meeting; highlighted contributions</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>Frequent Communication <i>Examples: Asked for help; talked through a challenge or mistake; praised someone for asking a question</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>Positive Relationships <i>Examples: Shared a funny story; started a social conversation in a group chat; built social time into a team meeting</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>Trust and Respect <i>Examples: Mediated team members facing tension; took accountability for a mistake; offered support during high stress</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>Ownership <i>Examples: Asked the team about challenges; had a discussion before problem-solving; collaborated with another department</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<p>Motivation <i>Examples: Celebrated success; asked what went well that week; organized a fun team challenge for the week</i></p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What Worked

Notes



Cultivating a Growth Mindset at Work



Level Summary

- A fixed mindset limits your potential. A growth mindset expands it - for you, your team, and your results.
- People with a growth mindset see talent like a muscle: it grows with effort, practice, and persistence.
- Progress often feels slow, but effort compounds. Every step forward- no matter how small- builds momentum.
- Teams with a growth mindset boost morale, set bigger goals, and stretch beyond their comfort zones.
- Growth starts with awareness. Challenge the stories you tell yourself - “I’m not creative,” “I can’t do that” - and replace them with possibility.
- Small shifts in language matter. Swap “I can’t” for “I’m not there yet” and watch how your outlook changes.
- Real growth lives outside your comfort zone. The task you’ve been avoiding is often the one that will unlock your next level.
- Developing a growth mindset doesn’t require a full overhaul. Start small- reframe one thought, try one new thing, or track one win this week.

Resources

- Growth Mindset in Action



CHALLENGE, LEARN, AND THRIVE

Objective: To encourage team members to develop a growth mindset by recognizing and challenging their limiting beliefs, focusing on positive self-dialogue, tracking their progress, valuing the learning process, and embracing challenges with a "try it anyway" approach.

Duration: 15 minutes

Tools Needed

- Video conferencing tool with breakout room capability
- Shared online document or virtual whiteboard (e.g., Google Docs, Miro)

Pre-Activity Preparation

- **Create** a shared document with sections for each skill focus: Assumptions, Negative Self-Talk, Tracking Progress, Valuing Learning, and Trying Anyway.
- **Prepare** a brief scenario or task that is relevant to your team's work but slightly outside their comfort zone.

ACTIVITY STEPS

Introduction (2 minutes)

- **Briefly explain** the concept of a growth mindset and its importance in personal and professional development.
- **Outline** the five skills you'll focus on: noticing and challenging assumptions, nixing negative self-talk, tracking progress, valuing learning as much as succeeding, and the courage to try anyway.

Breakout Session (8 minutes)

- **Divide the team** into small groups and assign them to breakout rooms. Each room focuses on one of the five skills, with instructions to discuss and list practical ways they can apply this skill in their daily work. Use the prepared scenario to guide their discussion.
- **Encourage** them to document their strategies and ideas in the shared document under the relevant section.

Group Share (4 minutes)

- **Reconvene** in the main room. Have a representative from each breakout room share a summary of their discussion and the strategies they've identified for their assigned skill.
- **Highlight** the interconnectedness of these skills and how they collectively contribute to fostering a growth mindset.

Commitment and Closure (1 minute)

- **Ask each team** member to choose one strategy or idea from the session that they will commit to trying in the next week to support their growth mindset development.
- **Remind** the team that developing a growth mindset is a journey that involves continuous effort and reflection. **Encourage** them to support each other in this process.

POST-ACTIVITY

- In the next team meeting, **allocate** a few minutes to discuss the progress, challenges, and insights the team has gained from implementing their chosen strategies.
- **Consider** making this a recurring activity, focusing on different scenarios or skills related to a growth mindset to deepen the team's understanding and application.

Developing People Through Purposeful Coaching



Level Summary

- Great coaching starts with curiosity. Ask questions that uncover strengths, spark passions, and reveal values.
- Coaching is not about giving answers - it's about unlocking potential. Your role is to guide, not dictate.
- The GROW model makes conversations practical: clarify Goals, assess Reality, explore Options, and define the Way forward.
- Doubt kills momentum. Show people you believe in them and they'll rise to the level of your trust.
- Open-ended questions are powerful, but they can overwhelm. Simplify by narrowing focus: "What's one small change that would help?"
- Real-world stories and lived examples help ideas click. Share your own challenges and how you worked through them.
- Give options without overload. Two clear choices can empower decision-making and build confidence.
- The best coaching happens by modeling. Lead with transparency, share your growth moments, and show what continuous learning looks like.
- Small actions compound into big changes. Coaching done consistently transforms not just individuals, but entire teams.

Resources

- GROW Model for Coaching



Have a coaching conversation this week with a direct report or colleague who wants to help you practice. Use the framework below to frame your conversation.

Keys To Success: Communication is 90% non-verbal, ensure that you have this meeting face-to-face, either live or via video conference.

HINT: If you are virtual, having your hands visible and gesturing builds trust with your audience.

GOAL	REALITY	OPTIONS	WILL
<p>Help the coachee articulate a specific, meaningful goal in the “here and now,” including what success would look like.</p> <p>It’s rare to uncover the most meaningful or impactful goal in the first discussion. It is the coach’s job to delve deeper to clarify the goal further.</p>	<p>Help the coachee articulate the “here and now” so they can map the journey to the goal.</p> <p>Watch for trying to gather too much data; as a coach, you only need to understand general dynamics, how the coachee interprets the situation, and the impact on them.</p> <p>Provide objectivity and invite the coachee to see the situation from different angles.</p>	<p>Help the coachee brainstorm a list of potential actions to move toward the goal.</p> <p>Go for quantity rather than quality of ideas; quality evaluation comes later.</p> <p>Encourage creativity and brainstorm ALL potential ways to achieve the goal before deciding on actions. Offer your ideas after the coachee exhausts theirs. Attribute equal weight to all ideas.</p>	<p>Help the coachee determine a specific action plan they “own” and follow to achieve the goal.</p> <p>This stage is about forward momentum and converting the discussion into a decision.</p> <p>Allow the coachee to select relevant actions and decide how they want to be accountable.</p>

SAMPLE QUESTIONS

<ul style="list-style-type: none"> • What do you want, desire, or need to overcome? • What are your interests, values, and motivations? • What will success or achievement look or feel like? • When will you know you have succeeded? • How will you know you have succeeded? • How important is this to you? 	<ul style="list-style-type: none"> • Where are you now with this topic? • What makes you think that? • What would your peers say about it? • What obstacles are currently in the way of your success? • What resources do you need to achieve your goal? 	<ul style="list-style-type: none"> • If your biggest obstacle wasn’t there, what would you do? • If you had endless resources, what would you do? • What would your best friend, manager, or peer want or do in this situation? • What can you do right now to further develop skills that would be useful in reaching your goal? • What have helpful mentors done that has helped you progress? 	<ul style="list-style-type: none"> • On a scale of 1-10, how committed are you to doing this? (If 6 or below, ask what would bring them to an 8-10.) • What obstacles could arise? How will you overcome them? • How will you and I know it’s been achieved or completed? • Who will you ask for feedback after you’ve taken action? • How can I provide more support toward your development?
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Identifying Skill Gaps



Level Summary

- Most organizations run with blind spots. Skill gaps quietly drain time, money, and opportunity.
- A gap analysis is like a map: you need to know where you are before you can plan how to get where you want to be.
- Strong one-on-one meetings bring these gaps to light. Done consistently, they build trust and create space for growth.
- Gap analysis works on two levels:
 - Individual: Spot where a person can grow and tailor development.
 - Organizational: See the big picture, anticipate future needs, and make smarter hiring and training decisions.
- The process is simple:
 - Define your destination - get clear on what success looks like.
 - Take an honest look at where you are now.
 - Identify what's missing—skills, resources, or mindset.
 - Take action with training, coaching, or process improvements.
- The best plans involve your team. When they help solve the problem, they not only close the gap but also strengthen a culture of continuous improvement.
- Gap analysis isn't a one-time task—it's a habit. The best leaders constantly assess, adjust, and evolve.

Resources

- 4 Steps to Conducting a Gap Analysis



Define Your Destination: Where Are You Going?

You can't close a gap without knowing what you're aiming for. First, define what success looks like. What's the bigger vision? Improving customer satisfaction, speeding up response times, or building a stronger leadership pipeline? The more specific you are, the easier progress is to measure.

Ask yourself:

- Where is my team or company headed?
- What are the key goals for this year?
- What would real success look like?

Clarity fuels progress - the clearer the goal, the easier it is to make decisions that move you toward it.

Take an Honest Look: Where Are You Now?

Once you know where you're headed, get real about where things stand today. Are your team's skills keeping up with industry demands? Do you have the right systems? What's working, and what's holding you back?

Ways to gather insights:

- Observe: What's happening day-to-day?
- Survey: Get team feedback on challenges and opportunities.
- Check metrics: Where do the numbers tell a different story than your gut?
- Have real conversations: Your team often sees gaps leadership misses.

No guessing: use data. The clearer you are on reality, the stronger your plan will be.

Identify the Gaps: What's Missing?

Now ask: What's stopping you from getting from point A to point B? Are you missing key skills, stronger training, or are outdated systems slowing you down? The goal is to pinpoint what's holding you back so you can solve the right problems.

If your team isn't hitting goals, is it because:

- Tools aren't efficient enough?
- Processes aren't clear?
- Training is missing to build confidence and competence?

Not all gaps are equal: find the root cause, not just the symptoms.

Take Action: How Will You Bridge the Gap?

Now that you know what's missing, it's time to act.

Ways to close the gap:

- Coach, mentor, or give direct feedback
- Run skill-building sessions or online training
- Pair employees for peer-to-peer mentoring
- Streamline systems or update outdated processes
- Launch initiatives that directly address the issue
- Hire strategically to fill skill gaps

The best solutions involve your team. Get their input, keep them engaged, and you'll not only close the gap - you'll build a culture of continuous improvement.

Mastering 1:1s (pt.1)



Level Summary

- Big things happen in small moments. A simple one-on-one, done consistently, can transform trust and performance.
- A 1:1 isn't just about updates—it's about connection. When people feel seen and supported, they bring their best work forward.
- The goal isn't to check a box—it's to strengthen relationships. Strong relationships unlock honest feedback, growth, and momentum.
- Effective one-on-ones uncover more than progress—they reveal blockers, strengths, and untapped potential.
- Consistency matters more than length. A focused 30 minutes every week builds more trust than a scattered hour once a month.
- Ask questions that go deeper than performance: “What motivates you?” “What’s blocking you?” “What’s one thing I don’t see that you wish I did?”



Mastering 1:1s (pt.2)



Level Summary

- Preparation shows respect. A good 1:1 starts before the meeting begins.
- Let them lead—begin with their wins, worries, or blockers.
- Keep your notes focused: celebrate progress, share feedback, set priorities.
- Feedback should target behavior, not identity.
- End with clarity—always confirm next steps.
- Listen more than you speak. Silence invites reflection.
- Ask sharper questions to spark sharper answers.
- Use the GOOD framework: Goals, Obstacles, Opportunities, Decisions.
- Capture notes. Commitments stick when written down.

Resources

- GOOD Framework
- A GOOD Check-In Conversation



Level-Up™ Leadership Review with a GOOD 1:1 Meeting



Goals

- Update on goal progress
- Potential adjustments
- Motivating/draining goals
- New goals

- Are your expectations SMART?
- How have you used a growth mindset?
- Who else's goals did you support?
- How can I best support you?



Obstacles

- Roadblocks to success
- Potential solutions
- Highest/lowest priorities

- What feedback do you have for yourself?
- How might this be related to DiSC?
- Tell me about how your expectations were not met.



Opportunities

- Future ambitions
- Development opportunities
- New skills/roles

- How can you use your DiSC strengths?
- Let's build a SMART goal for this.
- How can you include your team in this?



Decisions

- Employee next steps
- Manager next steps

- How will you make this happen?
- What do you need from me?

Level-Up™ Leadership Review with a GOOD 1:1 Meeting

Date:

Manager:

Employee:



Goals

- Update on goal progress
- Potential adjustments
- Motivating/draining goals
- New goals

- What makes you intrinsically motivated?
- Who else's goals did you support?
- How can you be more clear?
- If you asked your team how they can contribute, what might they say?



Obstacles

- Roadblocks to success
- Potential solutions
- Highest/lowest priorities

- How can you connect to individual needs?
- What role did DiSC play in this tension?
- How can you be more curious not judgmental?



Opportunities

- Future ambitions
- Development opportunities
- New skills/roles

- What does winning look like?
- Have you asked your team for feedback?
- Where is there opportunity to reinforce positive behaviours / skill sets?



Decisions

- Employee next steps
- Manager next steps

- What skills do you still need?
- Tell me what I can improve on.

Use this template to record your 1:1 meetings.
Ensure that you are face to face either physically or virtually.

Date:

Manager:

Employee:



Goals

- Update on goal progress
- Potential adjustments
- Motivating/draining goals
- New goals



Obstacles

- Roadblocks to success
- Potential solutions
- Highest/lowest priorities



Opportunities

- Future ambitions
- Development opportunities
- New skills/roles



Decisions

- Employee next steps
- Manager next steps

Use this template to help guide an effective check-in conversation.

Goals

- What long-term goals have we agreed to?
- How have things gone since we last spoke?
- What are our plans until next time?

Obstacles

- What's standing in your way?
- What have I noticed getting in your way?
- What can I do to help? What can you do?

Opportunities

- What are you proud of that people don't know about?
- Do you feel you're growing toward where you want to be?
- What could we do to make this your dream job?

Decisions

- What actions will you take before next time?
- What actions will I take before next time?
- What other big decisions did we make?

G.O.O.D. Feedback is:

Specific

Can you give me an example?

Frequent

Wish I'd known this sooner.

Outcome-Focused

Why does this matter?

Positive

What am I doing well?

Conversational

When do I get to talk?

Why Do Expectations Matter



Level Summary

- Goals don't get met by skill alone. Alignment is the real driver of team success.
- Vague goals create vague results. Clarity creates momentum.
- Urgency without clarity leads to wasted effort. People will act - but not always in the right direction.
- Expectations are the foundation of high-performing teams. When people know what success looks like, they can use their strengths to get there.
- Great teams run on three habits:
 - Be Clear: Define goals simply.
 - Be Considerate: Tailor to how each person processes information.
 - Be Communicative: Keep the conversation open and ongoing.
- Don't assume understanding. Unclear is unkind. If you expect results, make expectations explicit.
- Especially on remote or cross-functional teams, clarity prevents drift and keeps progress consistent.
- The hardest expectations to manage are the ones we don't know about.

Resources

- Setting Crystal Clear Expectations
- Objectives Key Results
- SMART Goal Setter for Developing Clear Expectations



Set Crystal-Clear Expectations

You can't expect your team to be accountable to goals they don't know about or understand. Likewise, you can't expect your team to follow rules you haven't set for them. That's why one of the best things you can do to improve accountability is to set crystal-clear expectations.

What does setting crystal-clear expectations mean? It means you need to clarify:



1

Roles and Responsibilities: Make sure employees understand their respective roles on the team. Designate clear task or project “owners” who are responsible for making sure those tasks or projects are completed.



2

Performance goals and expectations: Team members should know who is responsible for each task and have a clear understanding of their performance expectations or desired outcomes. What is the minimum expectation? Best-case scenario? Success?



3

Workplace Policies: Don't let flexibility be an excuse for ambiguous workplace policies. Clearly communicate policies about vacation time, working hours, and even consequences for performance issues so that everyone is on the same page.

Bottom line: No one on your team should have any doubts about their role, responsibilities, performance expectations, or workplace policies and best practices.

Objectives Key Results

What are they & how do I use them?

The expectations you set for your team are often tied to organizational objectives. You direct and delegate your team to achieve the objectives of the organization as a whole. Before we can begin setting and maintaining expectations, we have to be clear on what those expectations should be. The model of Objectives and Key Results allows us to determine what those expectations should be.

What is it?

Objectives and Key Results (OKRs) are a management tool to ensure your team focuses efforts on the organizational goals. It is a good way to make sure each department knows how it contributes to organizational goals and shares accountability for their accomplishment.

What does it mean?

Objectives = What you want to accomplish

Key Results = How you will accomplish it

How can you use them?

For team-level goals, recognize that not every organizational OKR needs to be reflected in every team OKR. It's possible that a team's OKRs will focus on just one of the organizational OKRs. But there should be some connection between team OKRs and at least one of the organizational OKRs.

One way to set these team OKRs is to have all of the team leaders meet to set goals. They can list priorities for the upcoming quarter in the context of the company OKRs. When creating these priorities, it is helpful to pay attention to the organizational OKRs and check:

- Do the team priorities connect to any of the organizational key results?
- Do the team priorities make it more likely that the organization will successfully achieve the organizational OKRs?
- Are there things missing that others think this team should be working on?
- Are there more than three priorities?

Objectives Key Results

What are they & how do I use them?

One thing OKRs are not is a checklist. They are not intended to be a master task list of all the things the teams will work on in a quarter. If a team treats this as a shared to-do list it may result in getting overly prescriptive about what the team wants done, rather than what the team wants to achieve. Use OKRs to define the impact the team wants to see, and let the teams come up with the methods of achieving that impact.

Need some examples?

Here are a few sample OKRs a team or individual might set to support an organization's goal to "reach xx% of industry market share."

Sample team or individual OKRs:

Objective: Accelerate [product] revenue growth

Key Results:

- Launch xx feature to all users
- Implement xx initiative to increase revenue per user by xx%
- Launch three revenue-specific experiments to learn what drives revenue growth
- Secure tech support to build xx feature in Q1

Objective: Improve [product]'s reputation

Key Results:

- Re-establish [product]'s leadership by speaking at three industry events
- Identify and personally reach out to top xx users
- Shorten response time to user-flagged errors by xx%



Use the Goal Setter to help you develop clear expectations to set with your team. The key is to frame the goal for your team so that they are specific, measurable, achievable, realistic, and time bound, in other words - SMART.

- S** Specific
- M** Measurable
- A** Actionable
- R** Realistic
- T** Time Bound

What do you want to do?

The first step is to define, as specifically as possible, what you want your team to do. The idea is to get a very clear vision of what you want them to accomplish. Create a headline-type statement that captures your SMART goal in two to three words.

Ex. Communicate challenges more

How will you know it's being done?

Now create a measurable target for your team. We can lose steam if we can't measure our progress. Remember it's better to break large goals up into many smaller ones.

Ex. Weekly check-ins

When will you do it?

To make sure you accomplish your goal, set a dedicated time to do it or accomplish it by. This can also be a great way to measure the goal. This way you know a concentrated effort is being made or habits are being formed no matter what.

Ex. Integrated to our team huddles

How confident do you feel?

Now it's time to decide how realistic your goal is. Take an honest look at it and compare it with past team goals. If you feel like your chances of accomplishing this goal are low, try breaking it up into even smaller goals. The important thing is to make some progress; no matter how small it seems it will add up.

Scale of 1–10

Now, how can you communicate it to your team?

We have a growth mindset culture, as a team we need to make an effort to communicate our challenges so we can become more effective and efficient. We are going to start checking in with each other by sharing challenges we are facing at our weekly meetings and exchanging ideas. Everyone should come prepared with a reflection to share each week. I believe this is an effective way to get more comfortable problem-solving collaboratively; what other outcomes do you think we will see? What resources do you need from me to participate?

Template for Writing a S.M.A.R.T. Goal

Use S.M.A.R.T. Goals to clearly define what your team should achieve. Turn a current or new team expectation into a concise, specific goal to support clear communication.

Initial Goal

(Write the goal you have in mind):

1. Specific

(What do you want them to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?)

2. Measurable

(How can you measure progress and know if you've all successfully met the goal?)

3. Attainable

(Does your team have the resources required to achieve the goal? If not, can you obtain them? What is the motivation for this goal?)

4. Relevant

(Why am I setting this goal now? Is it aligned with overall objectives?)

5. Time-bound

(What's the deadline / frequency and is it realistic?)

S.M.A.R.T. Goal

(Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed):

Setting Expectations That Support Achievement



Level Summary

- Skill isn't enough. Alignment is what drives real results. Clear expectations are the anchor for high-performing teams.
- Expectations don't just predict performance, they shape it. Set the bar high, communicate it clearly, and people will rise.
- Alignment starts with clarity: define the what, give space on the how, and make accountability visible.
- Strong expectations are firm, clear, measurable, motivating, and fair.
- Delivery matters. Face-to-face builds trust, body language reveals cues, and plain language prevents confusion.
- Spell it out. Boil goals down to one simple sentence. Make sure everyone can restate it in their own words.
- Make it visual. Use charts, boards, or checklists to keep expectations front and center.
- Clarity upfront saves time later. Five minutes now prevents hours of cleanup.
- Be generous with information. The more context you share, the stronger the commitment.
- If expectations still aren't sticking, don't get louder—get sharper. Visualize, check in, bridge skill gaps, and own the outcome.



Believing Your Team Can Achieve



Level Summary

- The most effective teams share one thing: belief. When people believe they can succeed, their habits shift—and results follow.
- Ineffective teams look the opposite. They chase personal agendas, lack clarity, dismiss ideas, and let trust break down. Fix the habits inside the culture, and you fix the team.
- The Pygmalion Effect shows why belief matters. When leaders expect success, people rise to meet it. When leaders doubt, people shrink back.
- High expectations fuel productivity. Confidence in your team creates confidence within them.
- Great teams aren't born—they're built. They align around purpose, communicate openly, divide work fairly, and hold each other accountable.
- The leader's mindset sets the standard. Believe your team can achieve—and they'll believe it too.

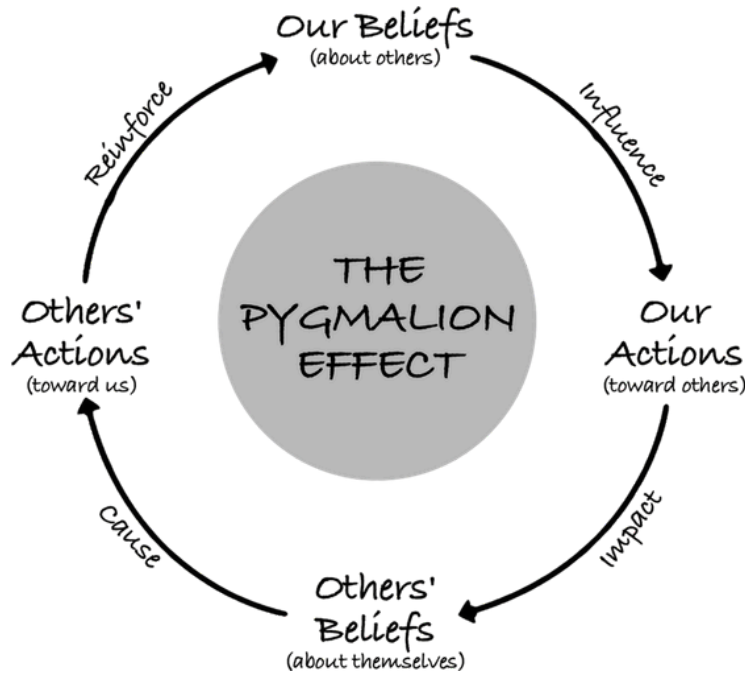
Resources

- Leveraging Pygmalion Management



Why It Matters

Your expectations shape your team's performance. When you believe people can achieve, they rise to it. When you doubt them, they feel it, and deliver less.



Core Principles

- **High expectations** → High performance
- **Low expectations** → Low performance
- Belief is visible. You can't hide what you really think- your team will pick up on it.
- Foundations matter. Early expectations shape long-term performance.

How to Put It into Practice

1. **Check yourself first:** Do you genuinely believe your team can succeed? If not, reset your mindset.
2. **Set clear, realistic expectations:** Stretch goals motivate, but only if they feel achievable.
3. **Communicate confidence:** how trust in your team's ability through your words, actions, and support.
4. **Model belief consistently:** New employees especially need to see your confidence in them.
5. **Develop alongside them:** Invest in coaching, feedback, and tools that help them reach high standards.

Bottom Line

Expectations are contagious. Believe in your team, set the bar high, and back them with the tools and trust to reach it. That's how you build a culture of performance and growth.

Maintaining Expectations to Achieve



Level Summary

- Accountability means ownership. Do what you said you'd do, speak up when you can't, and adjust when needed.
- Small acts of follow-through build trust. Consistency compounds into culture.
- Remote teams thrive on accountability. The strongest ones follow through, own outcomes, and stay aligned without micromanagement.
- Accountability fuels productivity, sparks initiative, and deepens engagement. People act differently when they feel the work is theirs.
- To strengthen accountability:
 - Connect the dots: Show why the work matters.
 - Make it visible: Use tools to track and share progress.
 - Build relationships: People show up for leaders they trust.
- Goals stick when they're both ambitious and realistic. Overstretch, and people disengage. Hit the sweet spot, and they rise to the challenge.



Addressing Unmet Expectations



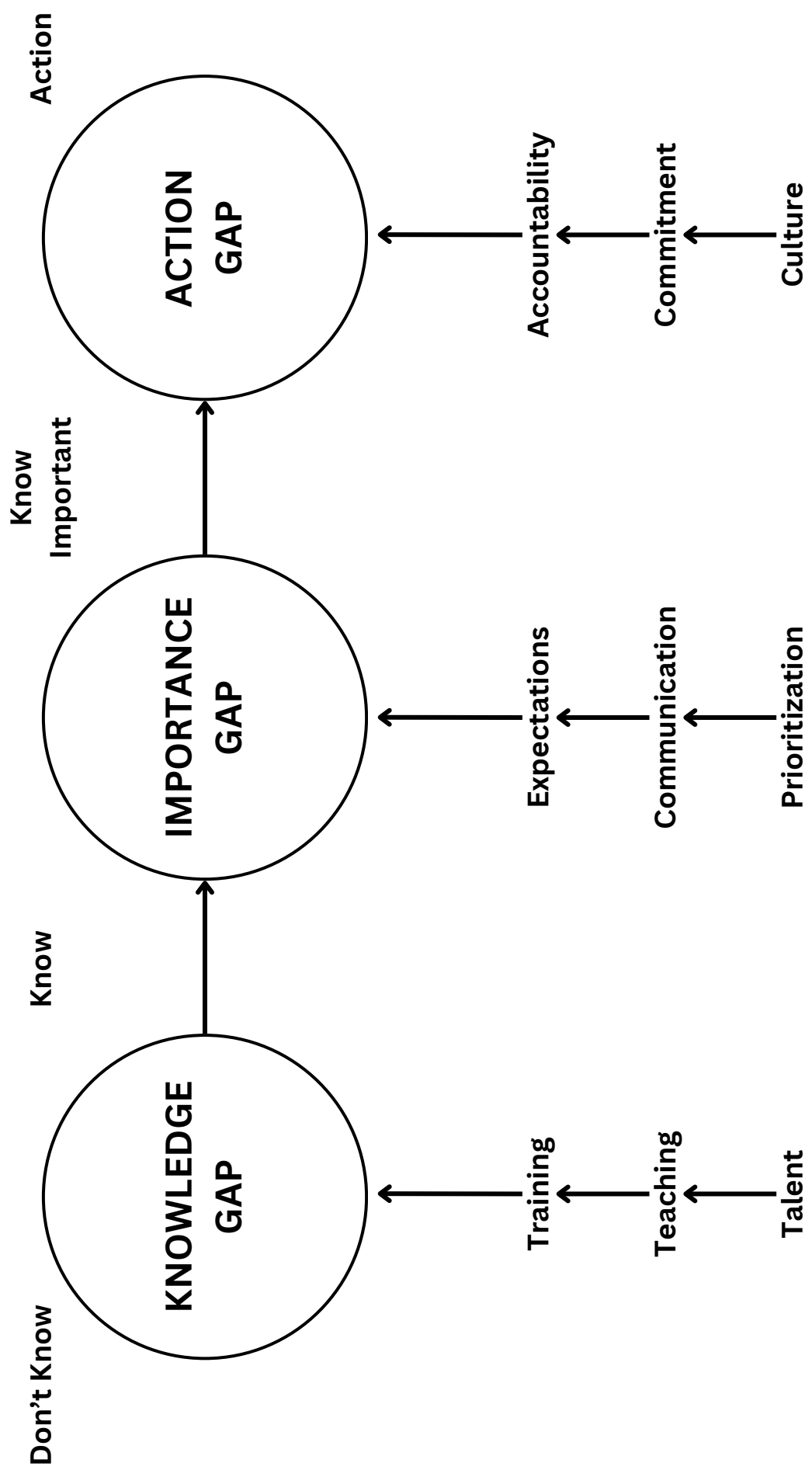
Level Summary

- Clear expectations don't always guarantee results. When they fall short, leaders need to diagnose - not just discipline.
- Red flags appear early: missed deadlines, repeated misunderstandings, excuses, or disengagement. Pay attention.
- Use Gapology to find the root cause:
 - Knowledge Gap: They don't know what to do.
 - Importance Gap: They don't know why it matters.
 - Action Gap: They know both, but don't follow through.
- Each gap has a fix. Train, clarify impact, or coach for follow-through. Match the solution to the cause.
- The problem isn't always the person. Sometimes it's the system, the communication, or the leadership approach.
- Small questions unlock big clarity: "What was unclear?" "What got in your way?"
- Diagnose first, then fix forward. That's how unmet expectations turn into lessons, and lessons turn into progress.

Resources

- GAPOLOGY: Identifying and Closing the Gap





The Importance of Delegation



Level Summary

- Doing everything yourself doesn't make you a leader - it makes you exhausted. Leadership is about creating the conditions for others to thrive.
- Delegation isn't giving up: it's gaining ground. It frees your time, builds trust, and grows your team's capability.
- Great leaders don't just do the work - they make sure the work gets done well. That means clarity, trust, and removing roadblocks.
- Delegation is simple: hand off tasks, give authority, and stay accountable for the outcome. It's not about doing less - it's about making others more.
- Done well, delegation multiplies impact. Done poorly, it creates confusion. Be clear, match tasks to strengths, and check in without micromanaging.
- The benefits are shared: you gain focus, your team gains ownership, and the organization gains resilience.
- Delegation sends a message of trust: "I believe you can figure this out," not "Do it exactly like me."

Resources

- [6 Reasons Team Managers Don't Delegate & How to Overcome Them](#)



6 REASONS

Team Managers Don't Delegate & How to Overcome Them

THEY DON'T TRUST THEIR TEAM'S ABILITIES.

"I can do it better myself." Or, "I'm afraid that they won't get it done/right." Entrust your team with tasks to create a culture of empowerment that allows team members to do their best work.



THEY THINK IT WILL TAKE TOO LONG TO TEACH OTHERS.

"It will be faster just to do it myself." Or, "I'm too busy to teach someone else." Divide the work between the team to save time. Invest in training now to see more efficiency and productivity later.



THEY FEEL GUILTY ABOUT DELEGATING.

"I want my team to like me." Or, "Everyone's already so busy." Take care of your team by giving them opportunities for professional growth.



THEY FEAR A LOSS OF CONTROL.

"I want to make sure it's done right." Or, "I like to feel in control." Give your team the authority and freedom they need to leverage their own strengths to deliver the best results.



THEY FEAR A LOSS OF IMPORTANCE.

"I want to make myself indispensable." Or, "I want to take credit for this work." Make yourself indispensable because of your ability to develop teams and get things done through others.



THEY ENJOY THE WORK.

"I enjoy doing this work, and I don't want to give it up." Delegate some of the work that you're most passionate about to your team to help inspire them, too.



What & How to Delegate



Level Summary

- Rule of thumb: delegate what creates growth, keep what requires your unique value.
- Smart delegation builds clarity, trust, and support. Poor delegation creates confusion.
- Match the task to the person: the right fit stretches skills without overwhelming them.
- Don't assume - confirm. True delegation ends when both sides share the same definition of success.
- Be clear, be strategic:
 - Explain what needs to happen.
 - Define what “good” looks like.
 - Offer support and context.
- Before you start a task, ask:
 - “Who else could do this?”
 - “Who would grow from it?”
 - “Who might even want it?”
- Not every task needs you. The best leaders make that call quickly, with confidence.

Resources

- 6 Steps to Delegate Effectively



1

Choose the right person for the job

2

Communicate the task & your expectations

3

Set timelines

4

Provide necessary support

5

Give the appropriate level of authority

6

Give feedback and celebrate success

Choose the right person for the job

Before assigning a task, ask:

- Who has the skills and experience?
- Who's expressed interest or could benefit from developing this skill?
- Who has bandwidth?
- Who's completed similar tasks before?

Avoid:

- Assigning to someone without the required skills
- Overloading already busy team members

Communicate the task & your expectations

When assigning, explain:

- What the task is and why it matters
- Objectives and what success looks like (criteria, quality standards)
- Constraints (timelines, budgets, scope)
- Dependencies (how this task impacts others)
- Available resources (tools, people, info)

Set Timelines & Checkpoints

- Establish a clear start and due date.
- Estimate how much effort is needed.
- Schedule check-ins—avoid micromanaging by setting these upfront.

Offer Support or Training (if needed)

If the task is new:

- Walk through a demo or example
- Provide a template, tools, or documentation
- Share best practices or quick-start guides

Give the Right Level of Authority

- Clarify what decisions they can make
- Let them know when to loop you in
- Notify others if their support or awareness is needed

Provide Feedback & Celebrate Wins

- Be available to answer questions as they work
- Offer feedback at each checkpoint
- Guide revisions as needed
- Recognize good work—acknowledge their success!

1 Choose the Right Person

Start by matching the task to the right person. Think about what's required to do the job well — skills, experience, and available time.

Ask yourself:

- Who has the skills or potential to succeed in this area?
- Who could benefit from learning something new?
- Who has the capacity to take this on right now?

Avoid assigning tasks to overloaded team members or those without the needed foundation. Delegation works best when it aligns with both ability and opportunity.

3 Set Timelines

Define when the work begins, when it ends, and what progress looks like in between.

Set checkpoints to review progress without micromanaging. These touchpoints keep momentum strong and make space for coaching if challenges arise.

5 Empower with Authority

Give your team member permission to make decisions within their role.

Make it clear:

- What they can decide independently
- What needs your input
- Who else needs to be informed

Empowerment signals trust. It helps your team feel capable and accountable.

2 Communicate Clearly

Once you've chosen the right person, take time to explain the task. Clarity upfront prevents confusion later.

Share:

- What the task is and why it matters
- What success looks like — key goals, quality standards, and timelines
- Constraints or dependencies, like budgets or connected projects
- Resources available, including people, tools, or documents

Context builds confidence. The clearer the handoff, the smoother the execution.

4 Provide Training & Support

Sometimes delegation means teaching before trusting. If your team member needs help getting started, show them how.

You might:

- Demonstrate a process or tool
- Share a past example or template
- Outline key steps to follow

Early support sets them up for success — and helps them gain independence faster.

6 Give Feedback & Celebrate Wins

Check in at your scheduled milestones. Offer constructive feedback that helps refine their work, and acknowledge progress along the way.

At completion, celebrate the outcome — whether it's a success, a learning opportunity, or both. Recognition reinforces growth and motivates future initiative.

Delegating the Right Tasks to the Right People



Level Summary

- Delegation isn't about doing less - it's about doing it smarter.
- Start with the task. What does it require—special skills, tight deadlines, or room for error?
- Then look at your people. Strengths, workload, interests, and growth goals all matter.
- Match the two. Right task + right person = better results.
- Adapt your style: some need step-by-step guidance, others just need trust and space.
- Use the 4 leadership styles: Direct, Coach, Support, or Delegate—based on readiness.
- Don't assume the most skilled person is always the best fit. Consider who can grow from it.
- Development tasks with flexible deadlines can stretch newer team members safely.
- Great delegation gets the work done and builds stronger people at the same time.



What Is Motivation?



Level Summary

- Motivation isn't control, it's choice. It comes from within, not from forcing others.
- Motivated people bring energy, focus, and persistence. They do better work and stay longer.
- Motivation boosts productivity, improves performance, reduces absenteeism, and builds a positive work culture.
- There are two types:
 - Intrinsic: fuelled by purpose, passion, curiosity, and growth.
 - Extrinsic: driven by rewards, recognition, or status.
- Intrinsic motivation lasts longer. It's the steady fire. But extrinsic rewards can spark momentum when needed.
- Motivation isn't one-size-fits-all. What drives one person may not matter to another—and it can change over time.
- To lead well:
 - Don't assume - ask.
 - Observe actions, not just words.
 - Test, adjust, and repeat.
- Keep the conversation alive. Motivation evolves, and so should your approach.



6 Strategies to Motivate Your Employees



Level Summary

- Motivation isn't one-size-fits-all. What sparks one person might leave another flat. Ask, don't assume.
- Money and fear can move people for a moment, but they rarely sustain true commitment. Real motivation grows from purpose, progress, and trust.
- Six proven strategies:
 - **Find out what people want most:** Ask directly, then listen.
 - **Involve them:** Ownership fuels effort.
 - **Connect to impact:** Show how their work matters.
 - **Set small goals + give feedback:** Progress creates momentum.
 - **Shape the environment:** Make the workplace supportive and engaging.
 - **Reward smartly:** Recognition beats routine perks.
- Great leaders notice when energy dips and ask, "What changed?" not "What's wrong with you?"
- Motivation isn't permanent, it needs to be fed. Keep the conversation alive, and you'll keep the spark alive too.

Resources

- 6 Strategies to Motivate Your Employees
- What Drives Us - Autonomy, Mastery and Purpose



1

Find Out What
People Want
Most

2

Involve
Them

3

Connect To
Impact

4

Set Small Goals +
Give Feedback

5

Shape the
Environment

6

Reward
Smartly

Go to the Source

- Ask employees directly what motivates them through 1-on-1 conversations, surveys, or tools like DiSC.
- Identify and prioritize motivators (e.g., meaningful work, flexibility, growth, advancement, accomplishment, respect) by letting employees share or rank what matters most to them.

Involve Them

- Involve employees in major decisions and projects so they feel invested and valued.
- Encourage ownership by using democratic brainstorming, asking for feedback on drafts, delegating projects with checkpoints, and regularly seeking team suggestions for improvement.

Connect To Impact

- Show employees the impact of their work so they know their efforts matter.
- Go beyond instructions. Explain why the work is important and what results it will achieve for customers, the business, or the industry.

Set Small Goals + Give Feedback

Motivation works best with the right level of challenge:

- Sidewalk Stroll: Too easy, comfortable but not motivating.
- Everest Climb: Too hard, overwhelming and discouraging.
- Steady Summit: Balanced challenge, achievable with effort and persistence, leading to pride and satisfaction.

Shape the Environment

- Foster a healthy culture and environment by encouraging open communication, truly listening to employees, and valuing their input.
- Build trust and respect by avoiding micromanagement, eliminating signs of distrust, and enforcing clear ground rules to prevent toxic behaviors.

Reward Smartly

- Use rewards to motivate employees, remembering they can take many forms: traditional (raise, bonus, promotion) or non-traditional (flexibility, development opportunities).
- Ensure rewards are valuable, clear, attainable, and fair.

Why Motivation Matters

Motivation fuels consistent performance and genuine engagement.

According to Self-Determination Theory, there are three core drivers that help people not only perform but thrive:

1. **Autonomy:** having choice and control in how we work
2. **Mastery:** growing our skills and improving through practice
3. **Purpose:** connecting our work to something meaningful

When these needs are met, individuals feel energized, creative, and committed to their goals.

<p>Autonomy Empower Through Choice and Trust</p>	<p>Autonomy is about giving people control over how they work - within a clear framework of trust and accountability. It's not about removing structure; it's about creating space for ownership.</p> <p>When leaders trust their teams, they unlock creativity, initiative, and stronger results.</p>	<p>Leader Tip: Offer freedom within boundaries. Set expectations, then step back and let people find their own way to meet them.</p> <p>Quick Check: Do team members have a voice in decisions that affect them? Are expectations clear yet flexible?</p>
<p>Autonomy fuels ownership - and ownership fuels results.</p>		
<p>Mastery Build a culture of growth</p>	<p>Mastery is the drive to improve, learn, and reach higher levels of skill. Leaders create mastery by celebrating learning, modeling curiosity, and rewarding progress—not just outcomes.</p>	<p>Leader Tip: Make growth visible. Share your own learning journey, and highlight moments of progress across your team.</p> <p>Quick Check: How often do you recognize learning behaviors? Are growth goals or success stories part of your team discussions?</p>
<p>“You don’t rise to the level of your goals; you fall to the level of your systems. Mastery is built in the habits you repeat.” – James Clear, Atomic Habits</p>		
<p>Purpose Connect the Dots to Meaning</p>	<p>Purpose gives work significance. It helps people see how their efforts contribute to something bigger - whether that's the team, the organization, or the world around them.</p>	<p>Leader Tip: Link everyday work to real impact. Show how today's tasks move the mission forward. Encourage team members to share why their work matters to them.</p> <p>Quick Check: Why does this work matter? Who benefits from what we do? What legacy are we building together?</p>
<p>When people know why they're doing something, they do it better.</p>		

What is Feedback & The Value of Feedback



Level Summary

- Feedback is just information. Clear, specific, and focused on growth - not blame.
- It's not a manager's tool or a once-a-year event. Feedback is for everyone, every day.
- Timing matters. The closer to the moment, the more powerful it is.
- Intent is everything. If you're here to help, your message will land. If you're here to vent, it won't.
- Feedback comes in two forms:
 - Redirect - Course-correct behaviors that don't work.
 - Reinforce - Celebrate and repeat what does.
- Silence feels like indifference. Even a simple "I noticed" can re-energize someone.
- When feedback flows, people gain what they can't create alone: perspective.
- The impact compounds: it sharpens performance, builds awareness, boosts motivation, and increases engagement.
- Feedback is a gift. The more you give it, the easier it gets, and the faster people grow.

Resources

- DiSC in Conflict
- Do's and Dont's of Feedback





D Style

Tend to overlook how their actions and behaviours affect others . Can have a short fuse, be impatient and see things as black + white. Tunnel vision.



i Style

Tend to be impulsive, unrealistic and overly optimistic. Can be frazzled and disorganized with little interest in the details. Overly trusting of people.



S Style

Tend to say "yes" too easily but can then feel taken advantage of without expressing discontent or disagreement. Can be slow to move. Resists change.



C Style

Tend to get stuck on details and find mistakes, coming across as too critical. Can be risk-averse and cave in conflict. Independent + inexpressive.

Do's of Feedback

Mindset & Intentions

- Acknowledge giving feedback is painful but essential
- Understand that receiving feedback is difficult too
- Recognize no one is perfect
- View both positive and corrective feedback as a gift
- Give feedback with the intent to help the receiver grow and improve
- Be willing to receive feedback
- End on a positive note

Building Trust & a Safe Environment

- Build trust and create a safe environment for feedback
- Encourage dialogue about progress
- Encourage or schedule regular feedback conversations
- Find balance among the types of feedback you give: appreciation, coaching, and evaluation
- Ask what you can do to help

Preparation & Planning

- Prepare for feedback: Write key talking points and prepare questions to ask
- Practice giving feedback

Delivery & Communication Style

- Be immediate and timely
- Remain calm and manage your emotions
- Practice active listening with good eye contact and open body language
- Be specific: Define specific behaviors to improve
- Stick to facts
- Describe outcomes: What was the result of the behavior, positive and negative?
- Focus on the future: What does this look like moving forward?
- Help set goals for improvement
- Provide a path of small, concrete actions
- Provide or find information that can help the receiver improve

Coaching & Collaboration

- Ask questions: Help the receiver self-evaluate to make connections about performance and identify new habits to build

Dont's of Feedback

Emotional Reactivity & Ego

- Turn the feedback receiver into a villain
- Allow ego, fear, or personality to prevent you from giving feedback
- Overreact or become upset
- Become argumentative
- Vent
- Try to prove who is right and who is wrong

Poor Communication Style

- Talk too much
- Be insincere in giving positive feedback
- Only focus on mistakes
- Focus on the past
- Inundate the receiver with your point of view and stories
- Be vague and long-winded when delivering feedback
- Interject your feelings into the conversation
- Treat feedback as a monologue
- Give feedback to just provide information

Bad Habits & Avoidance

- Stockpile negative feedback
- Give feedback rarely
- Email negative or corrective feedback
- Avoid giving feedback just because you think the other person will react badly

Unrealistic Expectations or Unsafe Context

- Have expectations the receiver cannot meet
- Discourage employees from coming to you with problems
- Put employees in an environment where they can't get help from others
- Assume what works for you will work for others
- Focus on a person's character

Following The Feedback Process



Level Summary

- Feedback feels tough because we wing it. A process makes it clear, calm, and effective.
- Start with intention: are you reinforcing, correcting, or clarifying? Every conversation needs a purpose.
- You're the pilot: set the tone, guide the conversation, and don't avoid discomfort. Silence isn't kindness.
- Pack empathy, not baggage. Stay factual, acknowledge emotion, and keep the focus forward.
- Use the **EARN** method:
 - Event: When and where it happened
 - Action: What you observed
 - Result: The impact it had
 - Next Steps: What to do moving forward
- Shift from judgment to curiosity. Ask "What's going on?" instead of "What's wrong with them?"
- Watch for feedback triangles. Redirect secondhand complaints back to direct conversations.
- Balance is key: be clear without crushing, kind without watering down.
- Feedback is a two-way street. The best leaders don't just give it, they invite it.

Resources

- EARN Model: Feedback Structure Template



	Event	Action	Result	Next Steps
	Describe the situation	Observed Behavior	The impact or consequence	Behaviors that need to continue/change
A	At the client meeting earlier...	You balanced sharing our ideas with hearing from them nicely.	The client told me that they thought we clearly understood their needs.	What did you do to prepare for this client meeting so we can continue to build on your success for future meetings?
B	During yesterday's weekly team meeting	You answered your phone and stepped away.	When we have time set aside for meetings, it's important that you're present and focused, and by taking a call and stepping away, you're neither.	How would you feel about leaving your phone at your desk during meetings or only answering it in an emergency?
C				
D				

Click [HERE](#) to view the EARN Model Template Spreadsheet

Why People React Negatively



Level Summary

- Fear of a bad reaction stops many leaders from giving feedback. But negative responses aren't about you, they're about being human.
- People often react poorly because:
 - **They feel attacked:** behavior feedback sounds like a personal critique.
 - **Their brain hits “panic mode”:** defensiveness is a stress response.
 - **Their confidence takes a hit:** even small notes can feel huge if they already doubt themselves.
- Negative reactions show up in common ways: silence, defensiveness, tears, avoidance, or anger. Expect them - you'll handle them better.
- The antidote is empathy. Stay calm, curious, and kind. Ask open-ended questions, listen for what's underneath, and focus on solutions, not blame.
- DiSC styles react differently under stress. Recognizing patterns helps you adapt and respond in ways that defuse, not escalate.
- Remember: feedback is growth fuel. A hard reaction doesn't mean you failed—it means you've hit something important.

Resources

- How to React to Negative Feedback Responses Using DiSC. Link [HERE](#).



Understanding Why Conflict Happens



Level Summary

- Conflict isn't always bad, it's a signal. It shows where values, needs, or goals collide.
- Most conflict comes from three roots:
 - **Miscommunication:** words, tone, or timing cause misunderstanding.
 - **Different priorities:** what matters most to one person isn't the same for another.
 - **Personal triggers:** stress, ego, or past experiences amplify reactions.
- Left unchecked, small conflicts grow into bigger problems. Address them early.
- People approach conflict differently. Some lean in, some avoid, some compromise, some compete. Knowing the pattern helps you respond wisely.
- The goal isn't to erase conflict—it's to manage it so tension turns into progress, not damage.
- Healthy conflict sparks innovation and clarity. Unhealthy conflict erodes trust.
- Leaders set the tone: stay calm, curious, and focused on solving the issue, not the person.

Resources

- Under the Hood: [LINK](#)
- 6 Steps to Mediating Conflict
- DiSC In Conflict



6 Steps for Mediating Conflict

Next time you are mediating a conflict, keep these 6 steps in mind and reflect on the outcome.



1

Set Ground Rules: Reach an agreement on rules

- Treat each other with respect
- No interrupting
- Don't be mean / get personal

Exchange Experiences: Hear from both perspectives first

- Focus on behaviours & situation
- Talk about impact not blaming
- Use "I" statements



2



3

Define the Problem: Get to the root cause

- Each party summarize the issue
- Provide an outsider's perspective
- Both parties agree on the root

Identify Interests: What does each party WANT to happen?

- Focus on the outcome not how
- What is each *desired outcome*?
- Shift them away from demands



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Brainstorm Solutions: Include both interests

- Refrain from judging or objecting
- Uncover lots of options
- Provide your ideas as well

Reach an Agreement: Find the compromise that works

- Remove unacceptable options
- Evaluate remaining ideas
- Agree on a compromise

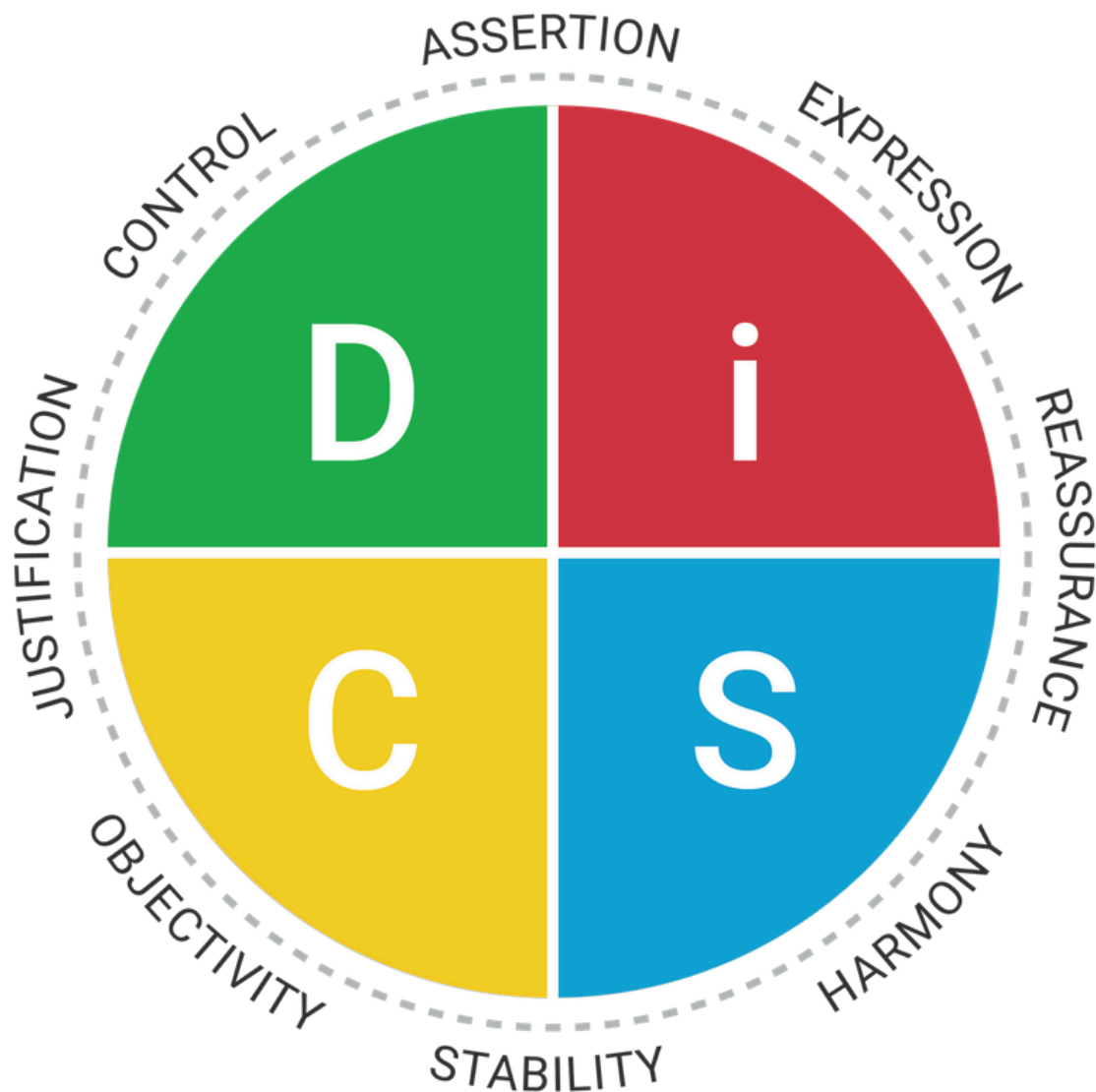


6



DiSC in Conflict

The priorities of each DiSC style when facing conflict. Remember to allow opportunities to exercise these priorities when managing through conflict.



Steps to Mediating Conflict



Level Summary

- Conflict spreads if ignored. Step in early. Not to take sides, but to guide people back on track.
- A mediator isn't a judge. Your job is to create safety, not decide who's right or wrong.
- Listen to understand, not to win. Clarity comes when both sides feel heard.
- Hold authority lightly. You have the final say, but the best solutions are the ones people build themselves.
- Decisions go both ways - everyone has a voice. A resolution only works if it works for all.
- Preparation matters. Set expectations, meet privately first, and uncover what's really driving the tension.
- Use the six steps:
 - Set the tone for safety
 - Let each party share their story
 - Identify needs and fears
 - Look for common ground
 - Build agreements together
 - Confirm next steps clearly
- Breakthroughs often come from what's unsaid. Dig deeper. Values and fears drive behavior more than words.
- Done well, mediation doesn't just solve a conflict—it strengthens the whole team.



How to Have a Difficult Conversation



Level Summary

- Difficult conversations are part of leadership. Avoiding them only increases tension.
- Honesty, when delivered with care, earns respect. Clarity is kindness.
- Progress depends on sharing and feedback. Don't let fear or perfectionism get in the way.
- Four steps make it easier:
 - Prepare – know the issue, your goal, and possible reactions.
 - Frame – start with shared goals, assume good intent, and acknowledge effort.
 - Discuss – stick to facts, share your perspective, and listen fully.
 - Wrap up – agree on solutions and confirm next steps.
- Keep the focus on behavior, not character. Talk about what happened, not who someone is.
- Lead with empathy and vulnerability. When you own your part, others are more likely to open up.
- A well-handled conversation doesn't just solve problems. It strengthens trust, relationships, and results.

Resources

- [How to Facilitate a Tough Conversation](#)



HOW TO FACILITATE A TOUGH CONVERSATION

Think of a tough but productive conversation that should take place. This week prepare the following and facilitate that tough conversation.

PREPARE

What is the issue?

What are your goals?

How might the other person react?

FRAME EFFECTIVELY

Focus on shared goals, highlight strengths and appreciations and listen to their perspective.

DISCUSS THE ISSUE

State the facts.

Share the impact.

Ask for their point of view.

WRAP UP

Summarize any outcomes, insights, or action items that came out of the discussion.



TIP: Use this prompt in ChatGPT to help you plan for the conversation:

Help me prepare for a tough conversation with my direct report. The direct report is a [BLANK] DiSC Style and I have to discuss [BLANK TOPIC] with them. Provide me with a script for the following:

- Opening the conversation productively by addressing the issue
- Framing the discussion by focusing on shared goals and my willingness to listen to their perspective
- Discussing the issue and the impact and requesting their point of view
- Summarizing the discussion and suggest productive next steps

What Does It Mean To Manage Up



Level Summary

- Managing up means working with your manager, not just for them. It's about building a partnership that helps you both succeed.
- At its core, it's doing your best work, communicating clearly, and adding value to the team.
- It is not flattery, manipulation, or telling your manager only what they want to hear.
- When you anticipate needs, share solutions, and stay aligned, you show leadership—not just helpfulness.
- Strong workplace relationships pay off. A positive dynamic with your manager opens the door to growth, mentorship, and new opportunities.
- The better you support your manager, the more they can support you. That's the power of managing up.

Resources

- [Tips for Managing Up](#)
- [High Value Behaviours](#)



TIPS FOR Managing Up

Get to know each other's preferences.

Pay attention to your manager's communication style, strengths, and work preferences so that you can accommodate them. Also, let your manager know your preferences and what you need to succeed.

Communicate effectively.

Effective communication is proactive, direct, respectful, clear, and concise. Don't leave important details out—and never hesitate to ask your manager questions to align expectations.

Take ownership.

Be accountable to your deadlines and performance goals. If you're struggling to meet a deadline or goal, talk to your manager about it right away. Also, take ownership of resolving problems by brainstorming solutions to present to your manager.

Fill gaps for your manager or team.

Ask yourself, "What do my coworkers and manager need from me today?" Use your strengths to fill in where your manager needs you most.

HIGH VALUE BEHAVIOURS

As an employee, that means you should always be asking yourself: “Am I adding to - or taking away from - my team’s culture?” Review the following checklist to see examples of ways to add value to your team culture. How many of these high-value behaviours do you currently practice?

I show genuine care and concern for my coworkers as human beings. I get to know them as people, pay attention to significant life events, check in to see how they’re doing, and make an effort to participate in social events.



I communicate thoughtfully and empathetically at work. I think about the impact my words, attitudes, and actions have on other people.



I operate from the basic assumption that my manager and coworkers have good intentions and my best interests at heart.



I embrace new work problems and challenges with enthusiasm. I take responsibility for my mistakes and the role I play in conflicts. I recognize and apologize when I’ve wronged someone.



I ask for feedback from my manager and peers regularly. I listen to others’ ideas, give credit where it’s due, and recognize my coworkers for their contributions.



I regularly ask what I can do to support my manager and team. I avoid company gossip, drama, and excessive complaining. If something’s bothering me, I speak to the other party or approach my manager about it directly.



Get to Know Your Manager's Style



Level Summary

- Every manager has a preferred way of working and communicating. Spotting it is the first step to managing up effectively.
- Some dive into bullet points. Others want big-picture ideas. Some value rapport first, while others just want the data.
- Observe closely. Notice their habits, tone, and tools - these are clues to what they need from you.
- Match their style:
 - Direct and task-focused → keep updates short and results-driven
 - People-focused and energetic → lead with connection, then details
 - Supportive and steady → be patient and reassuring
 - Analytical and detail-oriented → provide facts and give them time to think
- Ask helpful questions:
 - How do you prefer updates?
 - How do you like feedback?
 - What's the best way to bring you challenges?
- Share your own needs too. Clear communication works both ways.
- When you align with your manager's style, your message lands stronger, trust builds faster, and the partnership grows.



Communicate Effectively & Proactively



Level Summary

- Managers can't solve problems they don't know about. Keeping quiet leaves everyone flying blind.
- Proactive communication builds trust. Share early, share often, and keep updates clear and concise.
- Four elements make communication effective:
 - Speak up quickly - small issues are easier to fix before they grow.
 - Share mistakes and roadblocks right away - your perspective helps the team adjust.
 - Disagree with respect - use thoughtful language to keep conversations constructive.
 - Focus on the right details - enough to inform, not overwhelm.
- Alignment comes from asking smart questions: What are the goals? What does success look like? What's the timeline? How will progress be measured?
- Silence creates stress. Regular, open updates replace confusion with clarity.
- The bottom line: Frequent, thoughtful communication keeps you and your manager aligned—and makes work smoother for everyone.



Taking Ownership & Bridging Gaps



Level Summary

- Every organization is like a rowing team. If you stop rowing—or row out of sync—you slow everyone down. The same is true at work.
- Taking ownership means doing more than your tasks. It's about spotting problems, bringing solutions, and stepping up when things go wrong.
- Real ownership shows up in four ways:
 - Offer recommendations, not just problems.
 - Take charge of your own career growth.
 - Meet or exceed your performance goals.
 - Own your mistakes quickly and fix them.
- Managers aren't perfect. They have strengths and weaknesses like everyone else. You add value when you bridge their gaps—helping where they struggle and leaning into your strengths.
- Ask yourself: What skills do I bring that my team or manager needs right now? What's missing that I could provide?
- True partnership happens when you play where you're needed most. Taking ownership and bridging gaps doesn't just help your manager—it makes the whole team stronger.



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