

ADVISA + GIVELIFY  
WHO YOU ARE IS HOW YOU LEAD

# Quick Reference Guide

Session-by-session  
takeaways + models

# Phase 1: Foundations

## Keys to remember from the Connection Circle:

- Leadership starts with self-awareness.
- Self-management helps us respond rather than react.
- Engaging others is the key to strong leadership.
- Teams achieve business results under strong, self-aware leadership.

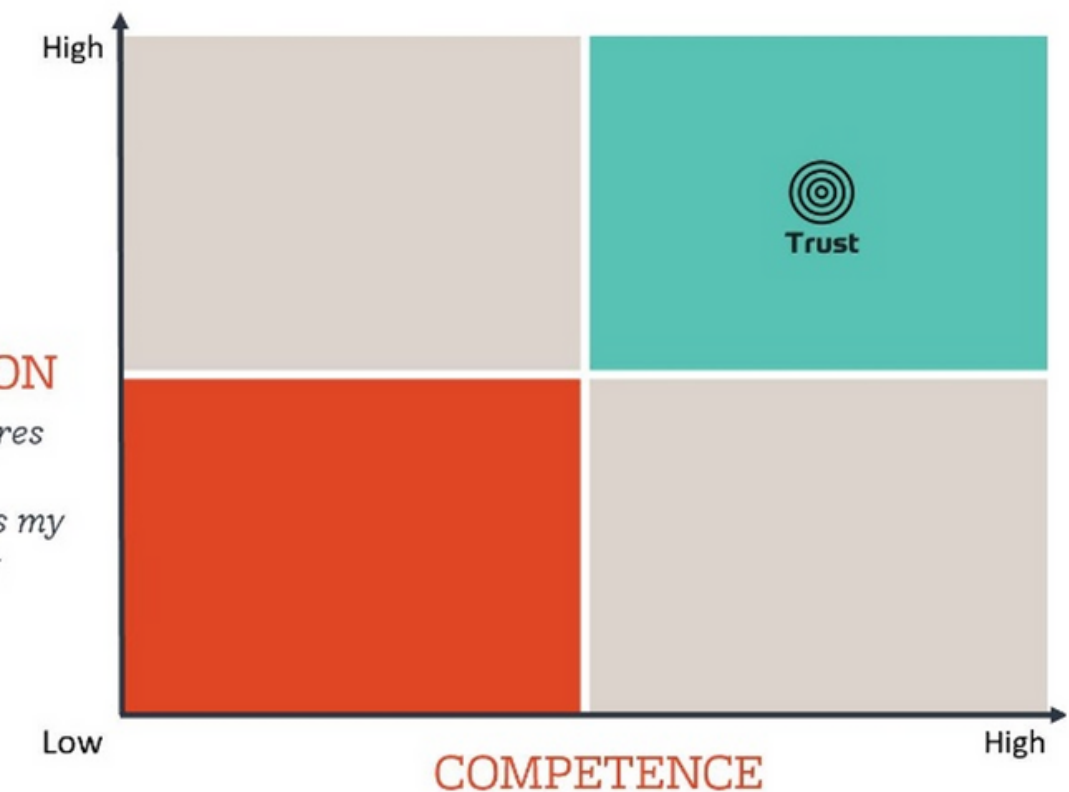


## Keys to remember from Connection + Competence:

- Leaders need a mutually-trusting relationship with the people they work with.
- This trust comes when both connection and competence are high.

### CONNECTION

*My manager cares about me as a person. S/he has my best interests at heart.*



# Phases 2 + 3: PI®, MYSELF, AND WORK

## Keys to remember from PI® + ME:

- PI tells us which drives and needs motivate our behavior.
- Leading with PI helps to unlock confidence and productivity in others.

## Keys to remember from PI® + THE JOB:

- A job requires a certain set of behaviors.
- Looking at people and job data tells us how a person relates to his/her job.

### LOW

Team Impact

Introspection

Variety

Flexibility

DOMINANCE

EXTRAVERSION

PATIENCE

FORMALITY

A

B

C

D

### HIGH

Individual Impact

Influence

Familiarity

Structure

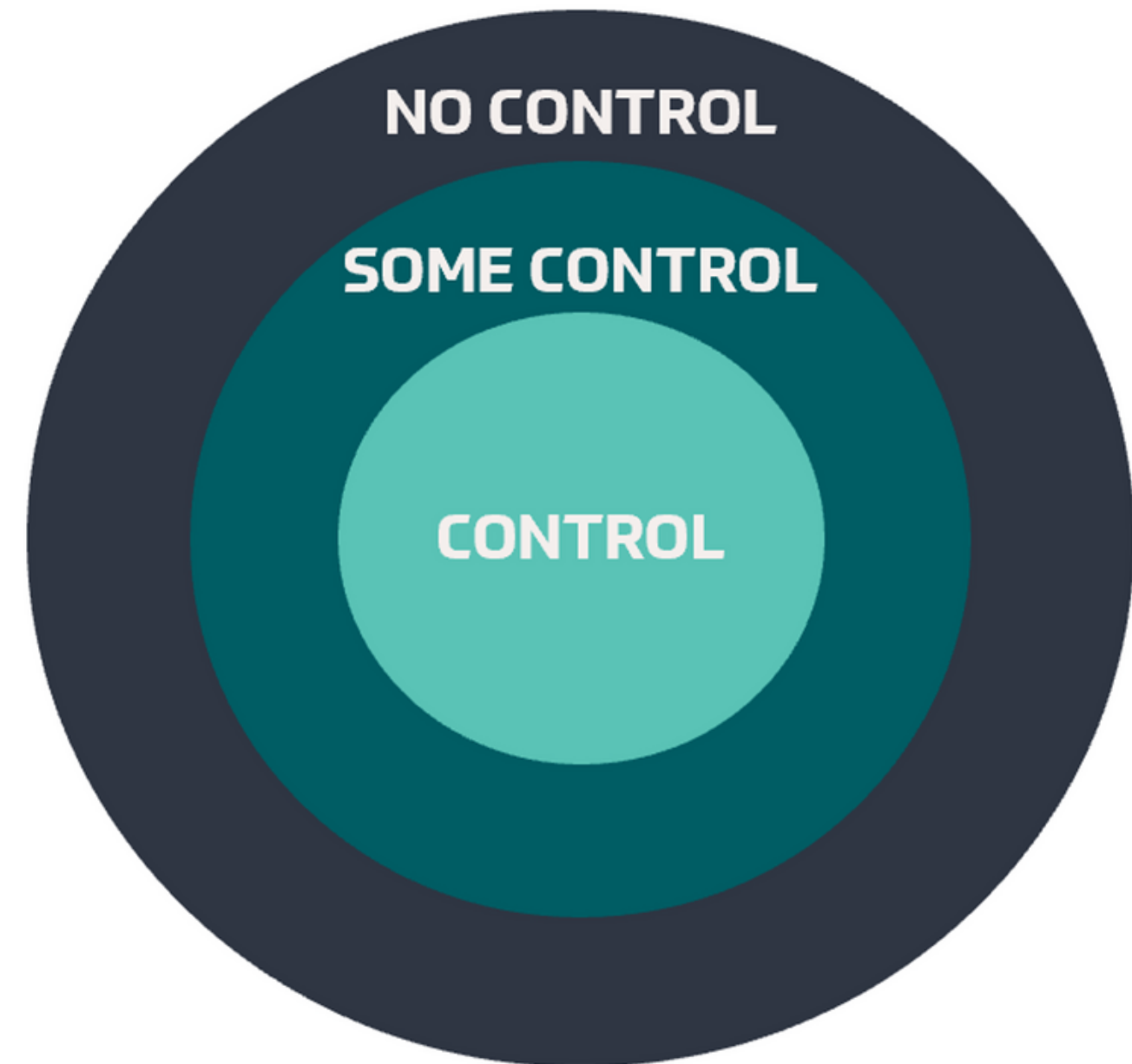


# Phase 4: Intentional Ownership

## Keys to remember:

You can approach challenges differently depending how much control you have over the outcome:

- Full control (e.g., thoughts, reactions, behaviors): **DO**
- Some control (e.g., other people's behavior, project outcomes): **INFLUENCE**
- No control (e.g., weather, global circumstances): **ADAPT**



# Phase 5: Communication

## Keys to remember:

- Invite a free flow of information by asking the right questions.
- Challenge yourself to replace closed-ended questions with open-ended or investigative questions.
- Remember, a vital piece of communication is how you respond to the answers you get.

Closed - Ended



Open-Ended

Investigative



**Step 1: Receive**

"What I'm hearing is  
you feel \_\_\_\_\_  
about \_\_\_\_\_."

"Thank you for telling  
me."

- acknowledge/affirm
- seek to understand

**Step 2: Process**



# Phase 5: Communication Cont.

## Keys to remember:

When communicating important messages, humans think in threes.

## Keys to remember when delivering Feedback with Situation

### Behavior Impact Model:

1. **Situation.** Lay out the facts of the situation as you observed them.
2. **Pause.** Allow air in the conversation for the person to respond.
3. **Behavior.** Highlight the gap between observed behavior and expected behavior.
4. **Impact.** Illustrate the impact that the observed behavior has/will have.

- 3 main points
- Who/where/when
- What/so what/now what
- 3 locations
- 3 steps
- 3 phases



### BONUS:

Follow up with a question, like: “How might you resolve this?” or “How might we move forward from here?”



# Phase 6: Team Dynamics

## Keys to remember:

Teams go through four stages of development, and precipitating events can cause teams to enter each stage.

1. Forming: getting to know each other
2. Storming: working out authority, solving tensions
3. Norming: establishing processes
4. Performing: succeeding and innovating



# Questions?

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