The Clearing

Culture Toolkit

2021

THE CLEARING™

Culture Toolkit Overview

Purpose

At The Clearing, we define culture as values and beliefs in action. It's the combination of behaviors that an organization, group, or team encourages and tolerates to enable business and mission results. Building and maintaining a strong culture requires intentional actions on a daily basis.

Depending on where a team is in its "lifecycle," it requires different tools to build, evolve, and maintain a healthy and productive team culture.

This toolkit offers a sample of tools that a team can use across the phases of its lifecycle to effectively enact a desired culture.

Toolkit Components
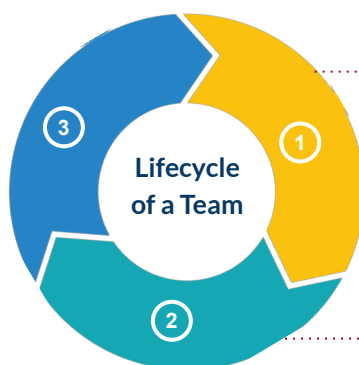
Culture Toolkit Overview

Lifecycle of a Team

At any point in time, a team is in one of three distinct phases in its lifecycle. These phases are cyclical and can be iterative. Teams move between phases as their environment, team, strategy, and mission change.

Phase 3
Acknowledge & Sustain

For high performing teams that are seeking ways to sustain momentum and continue to grow.

Lifecycle of a Team

Phase 1
Align & Design

For teams that need to (re)establish a strategic foundation for success.

Phase 2
Build & Empower

For strategically aligned teams looking to perform at their best.

Phase 1
Align & Design

To build a strong foundation for a team's culture, it is essential to:
- Establish a strategic direction, vision, and mission
- Clarify roles and responsibilities
- Set expectations for behaviors, norms, and operating principles
- Align resources, processes, and structures to support strategy

Phase 2
Build & Empower

To align a team to perform at its best, it is essential to:
- Execute on strategic vision
- Establish workability, communication, and trust
- Leverage individual and team strengths
- Navigate decision-making and conflict

Phase 3
Acknowledge & Sustain

To sustain a team's momentum and growth, it is essential to:
- Celebrate and acknowledge success
- Renew commitment to strategic direction
- Incorporate lessons learned into operations
- Design and launch new initiatives

👥 Culture Toolkit Overview

Lifecycle Phases and Tools

For each stage of the team lifecycle, there are tools that can support teams in sustaining their culture. As teams progress through their lifecycles, they will, at different points, revisit previous phases to re-align, re-design, and re-build as needed.

Phase 1 | Align & Design

For teams that need to (re)establish a strategic foundation for success.

Tool 1 | Define Mission, Vision, and Values
Tool 2 | Clarify Goals and Roles
Tool 3 | Declare Team Culture

Revisit this phase when you are:

- Building a new team
- Experiencing a change in strategic direction
- Lacking clarity around roles and responsibilities
- Noticing a lack of motivation or purpose that is negatively impacting the ability to achieve the mission
- Onboarding new team members
- Shifting organizational structure

Phase 2 | Build & Empower

For strategically aligned teams looking to perform at their best.

Tool 1 | Leverage Strengths
Tool 2 | Set Teaming Expectations
Tool 3 | Practice Prioritization
Tool 4 | Cultivate Trust

Revisit this phase when you are:

- Working with a team with a diverse set of talents
- Noticing opportunities to improve the way you work together as a team
- Struggling to prioritize what is most important
- Expanding and contracting a team
- Moving into a collaborative stage of a project
- Running into interpersonal tension or conflict

Phase 3 | Acknowledge & Sustain

For high performing teams who are seeking ways to sustain momentum and continue to grow.

Tool 1 | Give Effective Feedback
Tool 2 | Respond to Feedback
Tool 3 | Celebrate Successes
Tool 4 | Build Resilience

Revisit this phase when you are:

- Having difficult conversations in service of growth
- Recognizing quick wins or major milestones
- Noticing symptoms of burnout
- Coming to the end of a long-term effort

Phase 1 | Align & Design

1 | Define Mission, Vision, and Values

A common purpose is the most effective way to turn a group of individuals into a team. The mission is the foundation on which a team is formed, and leaders who enroll their teams in a shared mission and clear vision establish an environment for an intentional culture to thrive.

The highest performing teams are not only aligned on their mission and vision, they are committed to a set of values that illuminate how they will work together in order to be successful. Team values are a powerful tool for encouraging the norms and behaviors that will permeate across all work.

📋 Team Charter

Mission | *Defines the group's overarching purpose, why it exists, and what it exists to do*

- ✓ Inspirational
- ✓ Clear and concise
- ✓ Memorable

What is our purpose?

Vision | *Clarifies the end goal – an ideal future state which the group strives to achieve*

- ✓ Aspirational
- ✓ Tangible
- ✓ Results-oriented

What will success look like?

Values | *Represent how a team gets work done – guiding principles and characteristics which embody how the group and its people are expected to operate*

- ✓ Behavior-based
- ✓ Fewest, most important
- ✓ Advance the mission

How will we work together to achieve it?

Phase 1 | Align & Design

2 | Clarify Goals and Roles

Goals and roles are the underlying organizing principles for all teams. When goals and roles are clear, people are able to be proactive and efficient in their work. When goals and roles are unclear, conflict can arise. Individuals want to understand how they fit into the bigger picture.

When taking on an important project, high performing teams map out their path to success. The REDPOINT framework below is an example of the critical components of a project, including:

As Is

What is our current state?

To Be

What is our end goal? When will we reach it?

Initiatives

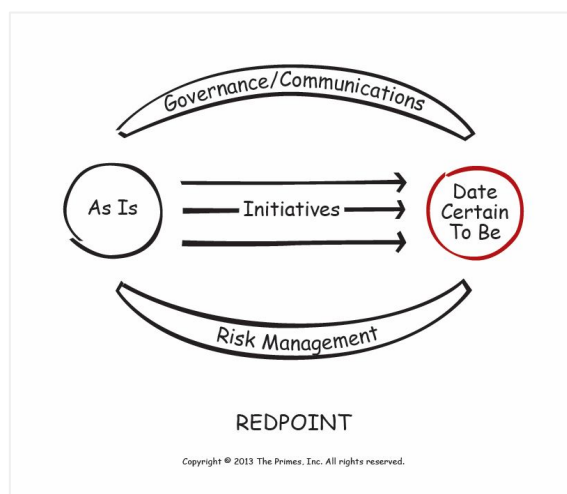*What activities will we take to reach our end goal?*

Governance/Communications

How will we actively support our initiatives?

Risk Management

How will we ensure success?

REDPOINT

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To ensure everyone understands their individual role in making the project a success, have an explicit conversation about roles and responsibilities. This can take the shape of defining who is responsible for specific actions, accountable for results, and consulted and informed about progress.

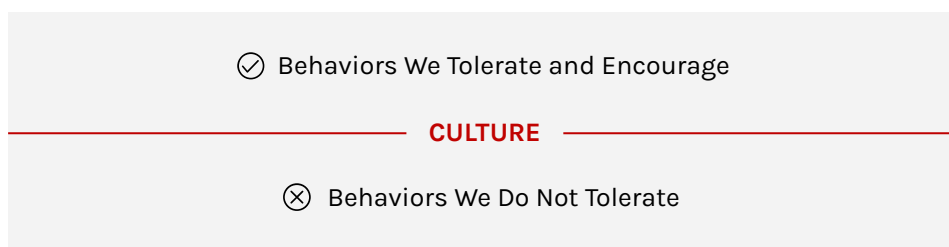|	
Responsible	Those who do the work to complete the task. There is at least one person assigned to be responsible, although others can be delegated to assist in the required work.
Accountable	The one ultimately answerable for the correct and thorough completion of the deliverable or task, the one who ensures the prerequisites of the task are met and who delegates the work to those responsible.
Consulted	Those whose opinions are sought, typically subject-matter experts, and with whom there is two-way communication.
Informed	Those who are kept up-to-date on progress, often only upon completion of the task or deliverable; and with whom there is one-way communication only.

Phase 1 | Align & Design
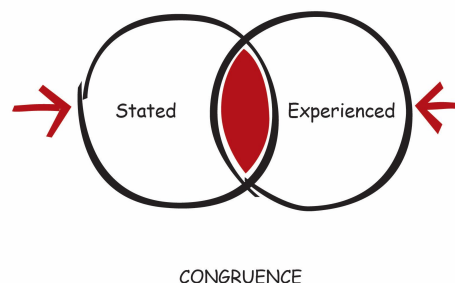
3 | Declare Team Culture

Stated Culture

Powerful cultures are explicit and intentional. It's critical for teams to establish, define, and document the behaviors they will encourage and the behaviors they will not tolerate. Declaring these behaviors is a key component to enacting a culture that is understood and adhered to in service of the mission.

Using a culture framework like the one below, leaders can create a visual depiction of the behaviors that are above and below the line for their team.

⊘ Behaviors We Tolerate and Encourage

—————————————— **CULTURE** ——————————————

⊗ Behaviors We Do Not Tolerate

Experienced Culture

Equally as important as defining these behaviors is revisiting them over time. Great leaders foster an intentional culture by evaluating how their stated culture aligns with the experienced culture – which is what it means to be congruent. Engaging in open, candid conversations about where the stated culture is congruent with the experienced culture allows for teams to have meaningful feedback conversations about existing gaps, and ultimately become more congruent over time.

Stated   Experienced

CONGRUENCE

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Phase 2 | Build & Empower

1 | Leverage Strengths

Every team is a collection of individuals with unique talents. Talents are skills and abilities that come naturally, and when cultivated, become strengths. People who use their strengths everyday are more engaged and productive in their work. Great leaders promote and encourage strengths-based teaming, which fosters a collaborative and inclusive culture.

TALENT	STRENGTH
Naturally recurring patterns of thought or behavior	*Maximized positive performance*
Potential	Performance
Being (how I am)	Doing (shows up through action)
Invisible	Visible

Identifying Individual Talents

Leaders who want to create a strengths-based culture start by identifying an individual's unique talents and their sources of energy and enjoyment. Some example questions:

➔ What parts of your job do you enjoy most?
➔ What pieces of your role come naturally to you?
➔ What kinds of tasks or activities bring you energy?
➔ What have other people said you are great at doing?
➔ What activities do you look forward to accomplishing?
➔ Where do you see overlap in your personal and professional success?

> ✩ *A talent becomes a strength when you invest time, energy, and resources to develop skills, build knowledge, and gain proficiency.*

Sharing Team Strengths

Strong team cultures are made up of people who are intentional in leveraging their strengths to accomplish their work. A strengths-based culture is an environment in which staff are encouraged to share their talents and lead with their strengths.

Suggestion: *Have each teammate answer the four prompts below, then discuss responses with the group.*

1. *You get the best of me when* _____.
2. *You get the worst of me when* _____.
3. *You can count on me to* _____.
4. *This is what I need from you to be successful:* _____.

Phase 2 | Build & Empower

2 | Set Teaming Expectations

Successful teams take the time to establish team "workability" (how they will best work together) by accommodating different learning styles, understanding communication preferences, and honoring the whole individual. Being intentional in setting teaming expectations enables productive and effective teamwork and opens lines of communication to navigate tension and conflict when they arise.

The outcomes of workability conversations include:

- A framework for balancing urgency and intentionality
- Consciousness of the greater "why" behind activities
- Openness to new ideas, feedback, and upgrades

Suggestion: *Complete a Workability Conversation Checklist like the example below and discuss as a team.*

Workability Conversation Checklist

Working Hours

- ☐ My standard working hours are:
- ☐ It's okay to contact me before and after these hours:
- ☐ I am typically not available during these times:
- ☐ I am/am not responsive on the weekend

Communication Method:

- ☐ I prefer _____ (email, Text, Chat, Voice Call, Video Call)
- ☐ If it's urgent, please _____ (email, Text, Chat, Voice Call, Video Call)

Learning Styles:

- ☐ Visual – learn by seeing
- ☐ Auditory – learn by hearing
- ☐ Reading/Writing – learn by reading and writing
- ☐ Kinesthetic – learn by doing

Working Conditions:

I like when teammates:

I dislike when teammates:

I am most productive when:

Phase 2 | Build & Empower

3 | Practice Prioritization

Differentiate Requests vs. Commands

When leaders make this distinction clear, individuals gain clarity on expectations: what is required, what is due, and what actions they need to prioritize. Without this level of clarity, people feel can overwhelmed, unsupported, or unheard. Listen to how your group exchanges ideas and asks for help.

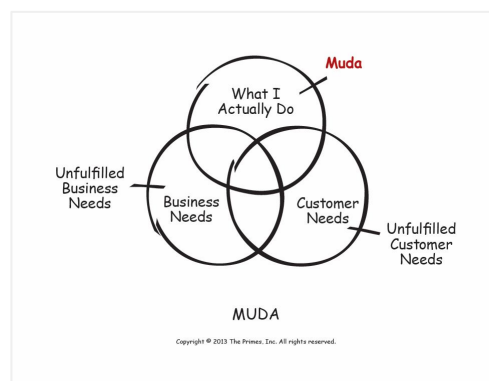| Statement	We need the deliverables by this week.	Response: None
Request	Can you send the deliverable by Friday at noon?	Response: "Yes" or "No"
Command	Send me the deliverables by Friday at noon.	Response: "Yes"

Implement Time Management

The urgent/important matrix is a simple decision-making tool that helps you prioritize your to-do list based on urgency and importance. The matrix is divided into four quadrants:

	URGENT	NOT URGENT
IMPORTANT	**Reduce** High importance and urgency – focus on these tasks first.	**Schedule** Important but not urgent – these tasks require initiative. Decide when you will accomplish them and set deadlines.
NOT IMPORTANT	**Delegate** Urgent but not important – minimize time spent on these tasks and delegate when possible. Empower the team by assigning tasks and supporting independent decision making.	**Declutter** Not important and not urgent – these lowest priority tasks may not align with mission and goals. Learn to say "no" and eliminate them from your priorities altogether if possible.

Eliminate Non-Value-Added Activities

MUDA, named for the Japanese concept for waste, is time and energy spent on activities which do not benefit a customer, stakeholder, or business need. Strategic teams practice prioritization by assessing and removing non-value-added activity.

MUDA

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Suggestion: As a group, inventory your collective activities. Which activities meet a business or customer need? Which serve neither? Have a conversation about the non-value-added activities that can be eliminated.
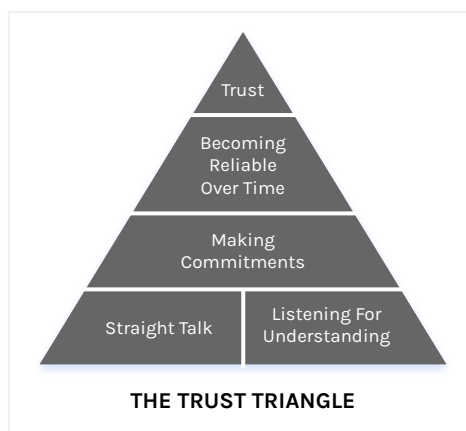
Phase 2 | Build & Empower

4 | Cultivate Trust

The foundation of a powerful team culture is a set of trusted relationships. The dynamic of relationships is the exchange of commitments and fulfillments. When we keep promises, we build trust over time. When we breach agreements, trust and relationships erode quickly. As a result, a team's trust begins with a leader's ability to maintain integrity around agreements.

THE TRUST TRIANGLE

Three Keys to Integrity:

1. Say "yes" to promises you will keep.

2. Say "no" to everything else.

3. If you break a promise, acknowledge the impact, renew your commitment to the outcome and relationship, and make a new promise with integrity.

John Carter's Trust Triangle asterisk *asserts that trust occurs when people tell it like it is, actively listen, and follow through on what they say they are going to do.*

Take Risks

Trust requires risk: one does not exist without the other. "Those who avoid risk lose priceless trust-building opportunities, while those who master risk-taking learn what is paradoxically the greatest risk mitigation strategy."**

Six Risks to Build Trust | *by TrustedAdvisor Associates LLC**

a. Tackle ambiguity.

b. Acknowledge uncomfortable situations.

c. Deliver bad news promptly and concisely.

d. Take responsibility for mistakes.

e. Be willing to express emotions.

f. Share something personal.

Sources

John Carter's Trust Triangle (Adapted from Terms of Engagement: New Ways of Leading and Changing Organizations). Richard H. Axelrod

**Six Risks You Should Take to Build Trust (Abstracted from The Trusted Advisor Fieldbook). TrustedAdvisor Associates LLC.*

Phase 3 | Acknowledge & Sustain
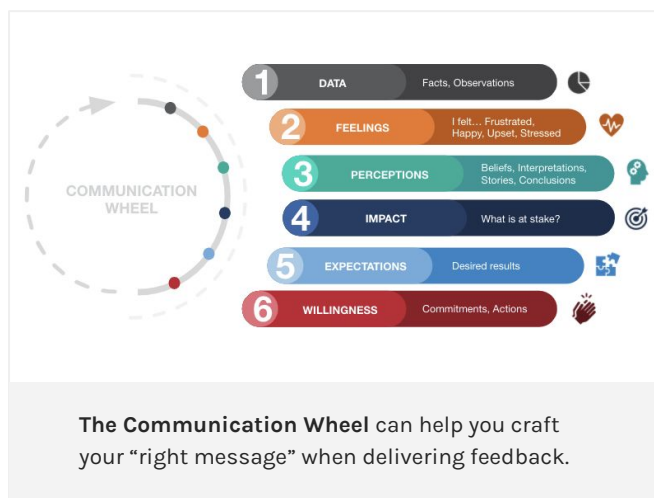
1 | Give Effective Feedback

Feedback conversations provide opportunities for the change and accountability needed enact a desired culture. However, feedback is often difficult to share because of a lack of trust, fear of reprisal or rejection, discomfort with conflict, or concerns about compromising a relationship. The following tools are designed to make holding feedback conversations easier so their rewards can be fully realized.

Feedback Styles | Identifying individual preferences can help improve the effectiveness of a feedback conversation. Try having this conversation as a team, and take note of everyone's preferred style:

- **Direct "Straight Shooter"** - You prefer feedback to be as clear and to-the-point as possible
- **Indirect** - You prefer feedback to be gentle and couched (e.g., stories, analogies)
- **Casual** - You prefer feedback in less formal settings (e.g., in snippets, real-time)
- **Sandwiched "Sandwich Artist"** - You prefer constructive feedback to be surrounded by positive feedback (e.g., positive/constructive/positive)
- **Community-Based** - You prefer feedback in a group setting (e.g., a team conversation)

Best Practices for Giving Feedback

- **Craft the right message -** Take the time to consider what you are really trying to convey. How can you say it in a way that the receiver will really hear?

- **Choose the right time -** Determine the best time for the receiver to get the message without distraction. Do you need a day to cool off so you can approach someone with empathy?

- **Have the right deliverer -** Consider who the right person is to deliver this feedback.

- **Deliver it in the right way -** Some people need a lot of context. Others prefer getting right to the point. The right way to deliver the feedback is the way the receiver wants to get it.

The Communication Wheel can help you craft your "right message" when delivering feedback.

- **Give feedback for the right reason -** Take the time to determine why you are giving this feedback. Is it for the benefit of the group or the receiver? Is it for your own peace of mind? The best reason is usually a combination of all three. However, part of the reason must be because you genuinely care for the person to whom you are giving the feedback.

Phase 3 | Acknowledge & Sustain

2 | Respond to Feedback

Receiving feedback can equally as hard as giving it. Great team cultures encourage not only collecting feedback, but actively listening to, acting on, and showing appreciation for others' insights. In order to effectively respond to feedback, receivers must put it into action. The responses should be:

Timely | Act on the feedback shortly after it was shared so those that provided feedback feel heard and that their input will be taken seriously.

Suggestion: Consider setting-up an email inbox or anonymous suggestion box where the team can provide feedback and make it a point to check for and respond to messages each week.

Accurate | Ensure you're acting on and addressing the true feedback at hand.

Suggestion: If the feedback is not anonymous, it might be worth following-up with the provider for a one-on-one conversation to ensure you're hearing the feedback correctly, identifying the root cause, and working to collectively come to a satisfying solution. If anonymous, summarize and share back what you think you heard and invite others to provide additional clarification, if needed.

Proportionate | Tailor your response to honor the individual's position, tenure at the organization, strengths, and unique perspectives. Different team members will have different needs. Also, consider how often you are receiving this feedback: are you hearing it from one person, or many? This may help determine the type of follow-up needed and assist with prioritizing the most pressing needs to address and act on right away.

Suggestion: Keep in mind a team member's individual needs and the potential urgency of the feedback – consider both short-term and long-term solutions in order to provide a proportional response. Perhaps an individual makes a suggestion that might take months to fully implement. While you might not be able to respond with a full solution now, what could be done immediately to alleviate part of the pain point while work begins on a more robust solution? Look for those quick wins, knowing everything cannot be solved at once.

Phase 3 | Acknowledge & Sustain

3 | Celebrate Successes

Track and Share Progress

As feedback and concerns are addressed and the congruence between the stated culture vs. the experienced culture increases, regularly take the opportunity to share these updates. This practice lets everyone know that suggestions are valued and result in real change. The more individuals see their ideas being considered, the more likely they are to bring additional ideas to the table, causing a collective ownership of the culture.

Suggestions: Send out a bi-annual poll to track progress against the baseline data. Hold all-staff town hall meetings or publish a monthly culture newsletter to help spread the word on workability changes happening within the organization in service of helping everyone live into the desired culture.

Acknowledge Accomplishments

When you see something, say something: make a conscious effort to recognize and acknowledge culture-positive behaviors early and often. This will help to encourage and normalize behaviors that foster your desired culture.

Celebrate when an idea is implemented, and as polling scores improve, honor what is working well and how the organization can continue to capitalize on these behaviors and actions to improve in other areas.

Thanks:
To Many, About One

Acknowledgement:
To One, Witnessed
by Many

ACKNOWLEDGEMENT

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Suggestions: Consider a monthly spotlight or an award for individuals who are demonstrating the cultural values, actions, or behaviors, and the positive impact they are having on the organization and mission. Continue to create space in organization-wide meetings or smaller team/division meetings for culture-related acknowledgements – showing appreciation to one, witnessed by many.

Phase 3 | Acknowledge & Sustain

4 | Build Resilience

Changing conditions impact the wellbeing of a team. Events such as the loss of key employees, reorganization, changes in policies, processes, and roles, or other unexpected, wide-scale disruptions can affect team morale. In addition, extended periods of high demand can lead to exhaustion or disengagement for even the highest performing teams.

Stress, anxiety, and burnout can take different forms, including:

- Interpersonal conflict or tensions
- Missed deadlines
- Lack of desire to take on new or different work
- Active ambivalence toward the mission
- Sleeplessness, illness, other health issues
- Outbursts, erratic behavior, or silence and disengagement

For a culture to sustain itself, a leader must know signals of burnout and a team must have a specific way that it discusses and responds to changing or draining conditions in order to maintain resilience and cohesion. To understand and combat burnout when faced with difficult conditions, it is important that leaders:

- **Check-in:** Gauge personal energy and gather perspectives from across the team to assess the challenges individuals are experiencing and the support they need to address them.

- **Find partners:** Engage informal leaders from across all levels of the team to provide support.

- **Create predictability:** Define and consistently relay a set of principles for how the team faces difficulty (e.g., be human-centered, know this is temporary, etc.) and use these to address issues and define actionable next steps.

- **Build a plan:** Identify a set of 30- or 90-day actions the team will take to manage changing conditions. Revisit and repeat, as needed.

- **Provide proof of results:** Narrate and frame results so the team can see progress and shifts over time.

- **Swing back:** Discuss how the team will return to normalcy - in advance - to shape how it recovers from a crisis.

Results

Behaviors

Emotions

Assumptions

Beliefs

Self Concept

Ask your team what **emotions** they are currently experiencing. Then, have them reflect and articulate the **assumptions** and **beliefs** they have about the current situation, and how these influence their **behaviors and choices**