
Earned

Facilitator guide

A four-day leadership intensive for
GTM leaders

Everything in this guide serves one shift: moving GTM people leaders from
producing results themselves to producing results through others.

Day 1

Invert the Triangle

Day 2

Build the Environment

Day 3

Lead With Your Ears

Day 4

Coach for Commitment

FACILITATOR

COHORT / DATES

Before You Facilitate

What you are being asked to do: run four days that move GTM people leaders from producing results *themselves* to producing results *through others*. Every module in this guide serves that one shift. If you are short on time, cut breadth, not practice. The coaching lab on Day 4 is the module that changes behavior; protect it.

Three things to do before Day 1:

- 1 Send the pre-work email (Appendix D1) ten days out. Participants who arrive without their own team data will spend the week on theory, and theory does not transfer.
- 2 Read the four scenario packs in the Appendix and pick the two that best match your cohort's business. Swap the names for products and segments your room actually sells.
- 3 Confirm room setup: rounds of four to six, not classroom rows. This program is 60% conversation. Rows kill it.

Non-negotiables:

- No laptops open during practice labs. Phones face down.
- Every module ends with a written commitment, not a summary.

THE ONES YOU ADD FOR THIS COHORT

THE ONE RULE

You facilitate; you do not present.

If you are talking more than 35% of any module, stop and ask a question.

Program at a Glance

DAY	TITLE	CENTRAL QUESTION	ENDS WITH
1	Invert the Triangle	Who is my leadership actually for?	Leadership style audit + focus commitment
2	Build the Environment	What am I building for my people to work inside?	Expectations audit + one change to position
3	Lead With Your Ears	Am I hearing what my team is actually telling me?	Listening plan + team vision draft
4	Coach for Commitment	How do I turn compliance into commitment?	Coaching plan + 90-day charter

Arc of the week. Day 1 works on the leader. Day 2 works on the conditions the leader creates. Day 3 works on the leader's primary instrument — conversation. Day 4 puts it together into a repeatable coaching practice. Each day assumes the one before it.

Daily rhythm. 8:30 start, 4:30 close. Two 15-minute breaks, one 60-minute lunch. Four modules per day, roughly 75–90 minutes each.

Cohort size. Designed for 20–24. For 12–16, run triads instead of quads and add one extra practice round on Day 4. For 30+, add a co-facilitator, split practice labs into two rooms, and use table-level report-outs only — full-room shareback at that size burns 20 minutes for four voices.

What Participants Get

- This guide's worksheets, printed as a participant workbook (12 worksheets, Appendix A)
- Scenario cards for the Day 4 coaching lab (Appendix B)
- A one-page 90-Day Leadership Charter they leave with, signed
- A 30/60/90 check-in cadence with their own manager, scheduled before they leave the room on Day 4

Pre-Work (send 10 days before Day 1)

Email template: Appendix D1.

Ask each participant to bring:

- 1 **Three names.** One person on their team who is thriving, one who is stuck, and one they have avoided a hard conversation with. First names only; they will never be asked to share them aloud.
- 2 **Their own calendar, last four weeks.** Printed or accessible. They will analyze where their time actually went.
- 3 **One sentence** answering: *If my team were asked what I expect of them, what would they say?* Written before they arrive, sealed, not revised.
- 4 **One decision they have been sitting on** for more than 30 days.

Tell them plainly: the program works in direct proportion to how honestly they fill this out. Nobody collects it.

Facilitator Stance

This cohort is deliberately mixed — some people two months into their first leadership role, some fifteen years in. That is an asset, not a problem, and you should say so on the first morning. The tenured leaders in the room are your best content. Your job is to get them talking about what they got wrong, not what they know.

Two failure modes to watch for:

The tenured leader who has heard it all. Do not argue. Ask them for the counter-example: "You've seen this fail. Tell us when." Their war story teaches better than your slide.

The new leader who takes everything as a verdict. Several modules are diagnostic and will land hard on someone six weeks into the job. Name it early: "Nothing this week is a performance review. It is a mirror, and mirrors are only useful if they're accurate."

DAY 1

Invert the Triangle

Day objective. By the end of Day 1, participants can describe the difference between a leadership style organized around themselves and one organized around their people, identify which one they currently default to under pressure, and name the small number of activities where their leadership actually creates value.

Day arc. Open on the promotion trap (why great sellers often struggle as leaders), move to the central model of the week, expose the two most common distortions of the leader's role, then close on focus.

TIME	MODULE
8:30	Opening and contracting
9:15	1.1 Appointed vs. Earned
10:15	Break
10:30	1.2 The Inverted Triangle
12:00	Lunch
1:00	1.3 The Ivory Tower and the Hero Trap
2:15	Break
2:30	1.4 Focus: Where Your Leadership Pays
3:45	Commitments and close
4:30	End

Opening and Contracting (8:30–9:15)

LEARNING OBJECTIVES

By the end of this segment, participants will have stated what they want from the week and agreed to how the room will operate.

FACILITATOR FLOW

Open cold. No agenda slide first. Put one question on the screen and let it sit for a full ten seconds before you say anything:

When your team hits their number, how much of that is you?

Ask for a show of hands on a scale: "Hands up if the honest answer is more than half." Then: "Hands up if the honest answer is almost none." Do not comment on the split. Say: "Hold that. We'll come back to it Thursday afternoon, and I'd like to see whether your hand moves."

Then contract. Walk the four days in ninety seconds using the Program at a Glance table. Do not read it. Name the arc: *the leader, the environment, the conversation, the coaching*.

Set the room agreements. Put these up and ask the room to add one:

- What is said about a named person stays in this room.
- Bring the real example, not the safe one.
- Disagree out loud. Silent disagreement costs us the insight.
- No laptops in practice. Nobody's forecast changes because you refreshed it.

Introductions with a constraint. Round the room: name, team, and *one thing about leading people that surprised you*. Cap at 45 seconds each. The constraint matters — open-ended introductions eat 40 minutes and teach nothing.

FACILITATOR NOTE

The opening question is doing real work. Sales and CS leaders are promoted for personal production, and many still privately measure themselves by it. Naming that tension in the first three minutes gives you permission to press on it all week. Do not resolve it now.

Module 1.1 — Appointed vs. Earned (9:15–10:15)

LEARNING OBJECTIVES

Participants will be able to:

- Explain why the capabilities that drive promotion into leadership are different from the capabilities that produce results as a leader
- Distinguish the authority conferred by a title from the influence that has to be earned
- Identify at least two independent-operator habits they still rely on

CORE CONCEPT

Most GTM leaders are promoted because they were excellent individual producers. The traits that made them excellent — self-reliance, personal ownership, speed, the instinct to grab the wheel — are the traits of an *independent* operator. They are genuinely valuable, and they are precisely the traits that cap a leader's ceiling.

The title is appointed. A VP signs a requisition and you are a manager on Monday. Influence is not appointed. It accrues, or it doesn't, based on what people experience of you over time.

The move the week is built around is from **independence** to **interdependence**: from producing results through your own effort to producing them through the combined effort of people who do not report their inner lives to you.

Three signals a leader is still operating independently:

- 1 **They take the pen.** In a deal review, they end up rewriting the strategy rather than improving the rep's.
- 2 **They are the escalation path for everything.** Nothing closes above a threshold without them in the room.
- 3 **Their team's performance is bimodal.** The people they spend time with are strong; the rest drift.

STORY

The Best Quarter Marcus Ever Had

Marcus Deel spent six years as the top enterprise AE in the West. He knew every objection, and he had a way of closing that people described as inevitable. When his RVP left, Marcus got the team.

His first year was extraordinary. The team finished at 128%. Marcus had personally sat in on 41 of the 63 closed-won deals, and had built the close plan himself for most of them. He was named leader of the year. In his acceptance remarks he said, entirely sincerely, that he had the best team in the company.

The following February, Marcus was pulled onto a strategic pursuit that took him out of the field for eleven weeks. The team finished the quarter at 54%.

What made it worse was what he found when he came back. Nobody had escalated. Three reps had deals stall in legal for five weeks and had simply waited, because in Marcus's absence there was no mechanism for a deal to move — Marcus was the mechanism. One rep told him: "I didn't want to bother you. You always just fixed it, and I figured you'd fix it when you got back."

Marcus had not built a team. He had built a very efficient extension of himself, and it ran exactly as long as he was plugged into it.

Debrief questions for this story:

- At what point in year one should someone have seen this coming? What would the signal have been?
- Marcus's 128% year was real revenue. What would you have said to him in month three, and how would you have made it land against a number like that?
- Where in your own team are you the mechanism?

GROUP DISCUSSION (20 MINUTES, TABLE GROUPS OF FOUR)

- 1 What did you personally get promoted for? Say it out loud, specifically.
- 2 Which of those strengths is still serving you as a leader? Which one is quietly getting in your way?
- 3 Finish this sentence honestly: *My team probably can't do _____ without me.* Is that a compliment or a design flaw?
- 4 Tenured leaders at the table: describe the moment you realized the independent approach had stopped working. What did it cost you before you saw it?

Report-out: one table shares only question 4. You are seeding the week with a peer's failure story, which is worth more than any model you can put on a slide.

WORKSHEET

Worksheet 1 — The Independence Audit (Appendix A). Ten behavioral statements, self-scored.

Participants complete individually in silence, then compare only the two items they scored highest with a partner.

TRANSITION

"Everything we just described comes from a single underlying assumption about who the leader is for. That assumption has a shape, and we're going to draw it."

Module 1.2 — The Inverted Triangle (10:30–12:00)

LEARNING OBJECTIVES

Participants will be able to:

- Describe the two orientations a leader can take toward their team and the observable behaviors of each
- Diagnose their own default orientation, particularly under pressure
- Identify two specific behaviors to change and predict the effect on their team

CORE CONCEPT

Draw a triangle on the flipchart, point up, leader at the top. This is how nearly every org chart in the world is drawn, and the drawing carries an idea: everything good flows down from the top, and the organization exists to serve the person at the apex.

The behavioral signature of a leader operating this way — call it the **Superiority orientation** — is consistent enough to be diagnostic:

- Tells rather than asks
- Needs to be in every decision
- Runs on control, and experiences delegation as risk
- Is oriented to problems: the job is to find what's broken and fix it
- Holds information closely; shares on a need-to-know basis
- Must be right

Now invert the triangle. Leader at the bottom. Same people, same reporting lines, opposite implication: the leader's function is to hold up the people doing the work, remove what's in their way, and make them capable of more than they could do alone.

The behavioral signature of the **Supportive orientation**:

- Asks more than tells; is known as someone who wants your read first
- Pushes decisions to the people closest to the information
- Runs on trust, and experiences delegation as leverage
- Is oriented to solutions and opportunities rather than fault
- Shares context generously, including bad context
- Can be wrong out loud, and lets others be wrong without consequence

The critical nuance — say this explicitly. Supportive is not soft. It is not consensus. It is not the absence of standards, and it is emphatically not the absence of decisions. A leader at the bottom of the triangle still sets direction, still makes the hard call, still holds people to a number. What changes is *who the structure is organized to serve*. A team that is focused on what the boss wants is focused inward. A team that is supported is free to focus outward, on customers and on the market. In a GTM organization, that difference shows up directly in the forecast.

Say this too: it is contagious in both directions. A VP who barks at directors produces directors who bark at managers, who produce managers who bark at reps. The last people in that chain are talking to customers.

STORY

Two Forecast Calls

Same company. Same week. Same agenda template. Two RVPs.

Call A. Dana Whitfield opens by sharing her screen with the pipeline dashboard already sorted by variance to commit. She goes rep by rep. "Priya, you moved Halvorsen out again. That's the second time. Walk me through why I shouldn't take it off the forecast entirely." Priya explains; Dana interrupts twice to correct the sequencing of the close plan. By minute forty, three of the seven reps have not spoken. The two who have are the two Dana called on. The call ends four minutes over. Dana's read afterward: "Good call. Tight. They know where they stand."

Here is what Dana did not learn on that call: Halvorsen slipped because the customer's CFO was replaced eleven days ago, the new CFO came from a company that runs a competitor's product, and two other reps on the call were seeing the same competitor show up in accounts that had never evaluated them before. That was a market signal. It was in the room and it did not surface.

Call B. Same agenda. Tomás Reyes opens differently: "Before we go account by account — what did you see this week that you didn't expect?" Silence for about eight seconds. He waits it out. Then a rep mentions a competitor showing up somewhere unusual. Another says, "That's funny, same thing happened to me Tuesday." Tomás asks three questions and says almost nothing else for six minutes.

They still go rep by rep. It still takes an hour. Tomás still moves two deals off the forecast and tells one rep directly that the close plan isn't real. Nobody would describe the call as soft.

But Tomás left that call knowing something about his market that Dana would find out six weeks later, in a loss review.

Debrief questions:

- What did Tomás actually do differently? Name the mechanics, not the vibe.
- Dana isn't a bad leader. What is she optimizing for, and why is it rational from where she sits?
- Which call is closer to the one you ran this week? Be honest — most of us run Call A and describe it as Call B.
- What is the cost, in dollars, of the information that didn't surface on Call A?

EXERCISE — THE PRESSURE TEST (30 MINUTES)

Participants often score themselves Supportive and behave Superiority under load. This exercise exposes that gap.

Setup. In pairs, each person describes a specific moment in the last 90 days when they were under real pressure — a quarter slipping, a bad escalation, a board question, a churn surprise. Not a hypothetical.

Partner's job. Ask only these four questions, in order, and take notes:

- 1 What did you *do* in the first hour?
- 2 Who did you talk to first, and what did you ask them?
- 3 What decision did you make, and who else could have made it?
- 4 What did your team see you do?

Then switch. Total 20 minutes, 10 each.

Debrief (10 minutes, full room). Ask: "Whose behavior under pressure was different from how they'd describe themselves on a good day?" Expect most hands. Then: "That gap is the real subject of this week. Nobody drifts toward Supportive under pressure. It has to be built deliberately enough to survive a bad quarter."

WORKSHEET

Worksheet 2 — Orientation Audit (Appendix A). Twelve paired behavioral statements. Participants score twice: once for a normal week, once for their worst week this year. The delta is the finding.

GROUP DISCUSSION (15 MINUTES)

- 1 What would your team say if they filled out Worksheet 2 about you? Where would they score you lower than you scored yourself?
- 2 Pick the single behavior where the normal-week and bad-week scores differ most. What is the trigger?
- 3 If you changed that one behavior, what would your team notice within two weeks? Be specific — what would be different in a meeting they attend?

Module 1.3 — The Ivory Tower and the Hero Trap (1:00–2:15)

LEARNING OBJECTIVES

Participants will be able to:

- Recognize the signs that they are operating on filtered information
- Explain why dependence on a charismatic leader caps an organization
- Design one mechanism to get unfiltered information from the front line

CORE CONCEPT: THE IVORY TOWER

The higher you go, the better the news you receive. This is not because people lie to you. It is because information is filtered at every hop by people who are, reasonably, managing their own risk. A rep tells a manager 80% of the truth. The manager tells the director 80% of that. Four levels up, a leader is operating on a picture that is directionally optimistic and quietly incomplete.

Two things make it worse in GTM specifically. First, dashboards feel like ground truth. A leader with a well-built pipeline report can genuinely believe they know what is happening, when what they know is what was typed into a CRM field by someone with an incentive. Second, senior leaders who surround themselves with people who agree with them will get agreement, and will mistake it for accuracy.

The remedies are unglamorous and they all involve leaving the office:

- **Ride-alongs and call shadowing** with no coaching afterward. If you debrief the rep, you have converted an information-gathering exercise into a performance review, and next time you will get a performance.
- **Skip-levels with a standing question**, not a general chat. "What is something everyone on your team knows that I don't?" works better than "How's it going?"
- **Customer visits you run yourself**. Four effects at once: the customer feels the weight of it, you hear the market unfiltered, your organization sees what you prioritize, and your team sees you doing the work.
- **Loss reviews where you are not in the room**. Have someone else run them and bring you the raw notes.

STORY

What Dana Learned in a Parking Lot

Dana Whitfield ran a clean operation. Her churn dashboard had been flagging the same reason code for two quarters — "Price / Budget" — on 38% of mid-market non-renewals. She had built a business case for a discount envelope and taken it to her VP. It was well-argued and it was going to get funded.

Two weeks before the decision, she rode along with a CSM to three accounts. She had not done a ride-along in fourteen months.

At the second account, the customer's ops lead said something offhand while walking them out: "Honestly, if the reporting piece had worked the way we thought it would in month two, we wouldn't be having this conversation. The price was never the issue. We just couldn't justify paying for something half the team stopped opening."

In the parking lot afterward, Dana asked the CSM how often she heard that. The CSM said, "Basically always."

Dana asked why the reason code said Price. The CSM was quiet for a second, then said: "Because 'Price' is a clean close-out. If I put 'Product adoption' I get a ticket, a root-cause meeting, and two weeks of follow-ups, and the account is already gone. Price closes the record."

Dana's dashboard had been telling her the truth about her own process, not about her customers. She had nearly spent a seven-figure discount envelope solving a problem she did not have.

Debrief questions:

- The CSM's behavior is entirely rational. What in the system made it rational?
- How long had this data been wrong, and how many decisions were built on it?
- What is the equivalent field in your business — the one everybody fills in the easy way?
- Dana found this by accident. What would it take to find it on purpose, every quarter?

CORE CONCEPT: THE HERO TRAP

The second distortion is more flattering and therefore harder to see. Some leaders are genuinely magnetic — they can walk into a stalled deal and unstick it, and everyone in the room feels it. It looks like leadership. It caps the organization for four reasons:

- 1 **It sets expectations nobody else can meet.** Internally and with customers, the standard becomes what the hero can do, not what the team can do.
- 2 **It creates dependency.** People sit in neutral, waiting. Why would you push, when the boss is going to come in and push better?
- 3 **It hollows out the layer below.** If the vision, the decision, or the recognition doesn't come from the hero, it doesn't count. Managers under a hero become schedulers.
- 4 **It requires an unbroken run of magic.** Every save raises the bar on the next one. Eventually there is a deal the hero cannot save, or the hero takes another job — and the organization discovers it has no muscle of its own.

The tell is simple: **when the leader is out for three weeks, what happens?** Marcus Deel's team told him the answer.

GROUP DISCUSSION (20 MINUTES)

- 1 Name a leader you have worked for who was the hero. What happened when they left?
- 2 What is your own version of the rescue? What do you swoop in and fix, and why does it feel good?
- 3 If you disappeared for a month starting tomorrow, what specifically breaks? List three things. Which of those three is a design flaw rather than a genuine dependency?
- 4 What information reaches you last? Who has it now?

EXERCISE — BUILD YOUR LISTENING POST (15 MINUTES)

Individually, each participant designs one concrete mechanism to get unfiltered front-line information, and commits to a date. It must be specific enough to put on a calendar. Examples to offer if the room stalls: two call shadows a month with no debrief; a standing skip-level with one question; running one loss review per month personally; sitting in the support queue for two hours a quarter.

Capture on **Worksheet 3 — Listening Post Design**.

Module 1.4 — Focus: Where Your Leadership Pays (2:30–3:45)

LEARNING OBJECTIVES

Participants will be able to:

- Distinguish activity from results in their own calendar
- Identify the small number of activities where their leadership creates disproportionate value
- Name what they will stop doing, specifically

CORE CONCEPT

A leader's core scarcity is not budget, headcount, or product. It is attention. And leadership attention is unusual in that its value is wildly unevenly distributed — a small number of activities produce most of the result, and the rest are activity that feels like work.

Two things make GTM leaders especially vulnerable:

Everything is urgent and legible. A slipping deal, an escalation, a pricing exception, a Slack thread — each arrives with built-in urgency and a clear completion signal. Coaching a mid-performer toward being a top performer has neither. The urgent crowds out the important, permanently, unless it is defended on a calendar.

Reactivity feels like leadership. Firefighting is visible, appreciated, and produces the sensation of a full day. It is also, structurally, the traditional manager's mode: responding to what happened rather than creating what's next.

The exercise is to name your **high-return activities** — the handful of things where *your* involvement, specifically, changes an outcome that would otherwise be different. For most GTM leaders these cluster in four places: coaching conversations with individuals, deal strategy at genuine inflection points, removing cross-functional obstacles the team cannot remove themselves, and developing the next layer of leaders.

Everything else is either delegable, automatable, or should stop.

The hard half of this exercise is the stop list. Most leaders will happily add high-return activities to an already-full calendar and change nothing. Push for subtraction. "What comes off?" is the only question that makes this real.

STORY

Sixty-One Things

Tomás Reyes tracked his time for three weeks — every activity, in fifteen-minute blocks. He expected it to be mildly interesting. It was worse than that.

He counted 61 distinct activity types. His week averaged 54 hours. When he sorted by hours spent, the top five were: internal meetings he did not run (9.5 hrs), pipeline inspection and CRM hygiene (7 hrs), deal desk and approvals (6 hrs), Slack and email (11 hrs), and forecast preparation for his own manager (4 hrs).

Then he did the harder sort. He went through the same list and marked only the activities where *his personal involvement* had changed an outcome. There were four: two coaching conversations with reps who were stuck, one intervention with Legal that unblocked a contract nobody else had the relationships to unblock, and one hour spent helping a rep restructure a deal that later closed at 2.3x its original size.

Four activities. Roughly six hours out of 54.

The uncomfortable part was not that 48 hours were wasted — a lot of it was genuinely necessary. It was that the six hours that mattered had all happened in gaps, opportunistically, whenever something slowed down enough to let them happen. None of them were scheduled. None were protected. In a busier week, all four would have been the first things to go.

Tomás's change was small and specific: four hours a week, blocked, non-negotiable, for coaching conversations. He gave up the two internal meetings he attended but did not run, and he stopped doing CRM hygiene for his reps — which he had been doing because it was faster than making them do it.

Nine months later his team's ramp time for new reps had dropped from seven months to four. He attributes essentially all of it to the four hours.

Debrief questions:

- Tomás gave something up. What did it cost him politically to stop attending those meetings, and how would you handle that here?
- He stopped doing CRM hygiene for his reps. What was he actually protecting by doing it, and what did stopping force?
- What are you doing because it is faster than making someone else do it?

EXERCISE — THE CALENDAR AUDIT (35 MINUTES)

Participants use the four weeks of calendar they brought in pre-work.

Step 1 (10 min, individual). Categorize every block into one of four buckets: *Coaching and development* · *Deal or account strategy* · *Obstacle removal* · *Everything else*. Total the hours.

Step 2 (5 min, individual). In the "Everything else" bucket, circle anything where their personal involvement changed the outcome. Be strict.

Step 3 (10 min, pairs). Partner challenges each item they kept. The challenge question is: *"What would have happened if you hadn't been there?"* If the honest answer is "roughly the same thing," it comes off.

Step 4 (10 min, individual). Complete **Worksheet 4 — High-Return Activities and the Stop List**. Three to five high-return activities, and a matching stop list of equal or greater volume. The stop list must be non-empty.

GROUP DISCUSSION (10 MINUTES)

- 1 What was your ratio of high-return hours to total hours? Say the number out loud.
- 2 What is on your stop list, and who do you need to tell?
- 3 What will make you abandon this within three weeks? Name the specific pressure.

Day 1 Commitments and Close (3:45–4:30)

FLOW

Silent writing (10 minutes). Each participant writes on their commitment card:

- One behavior I am changing, stated as an observable action
- The person on my team who will notice first
- The specific day next week it happens

Pairs (10 minutes). Read your commitment to a partner. The partner's only job is to ask: *"How will I know you did it?"* Refine until the answer is concrete.

Full room (15 minutes). Six to eight volunteers read their commitment aloud. Do not comment on each one. Say thank you and move to the next. The public statement is the mechanism; your feedback would dilute it.

Close (10 minutes). Return to the opening question — *when your team hits their number, how much of that is you?* Do not ask for hands again. Say: "Tomorrow we stop working on you and start working on what you're building for other people to work inside."

FACILITATOR NOTE

Collect commitment cards, photograph them, and return them. You will need them on Thursday afternoon for the charter exercise, and participants reliably lose them.

DAY 2

Build the Environment

Day objective. By the end of Day 2, participants can describe the conditions that produce high performance in a GTM team, audit the gap between what they think they expect and what their people think they expect, name the cost of a mismatch they have been avoiding, and position a change so that it lands.

Day arc. Day 1 worked on the leader. Day 2 works on what the leader builds. The through-line: performance is not primarily a function of individual talent, it is a function of the conditions talent operates inside — and those conditions are a leadership output, not an accident.

TIME	MODULE
8:30	Open and Day 1 debrief
9:00	2.1 What People Actually Want
10:15	Break
10:30	2.2 Shared Expectations
12:00	Lunch
1:00	2.3 The Mismatch You Haven't Named
2:15	Break
2:30	2.4 Change: Growth or Grief
3:45	Commitments and close
4:30	End

Open and Day 1 Debrief (8:30–9:00)

Do not recap Day 1. Ask instead:

Who did something differently yesterday evening or this morning because of yesterday?

Take three or four answers. If nobody has, say so without judgment — "That's normal, and it's also the whole problem. Ideas don't transfer. Actions do." Then ask what would have to be true for someone to act by tomorrow morning.

Preview Day 2 in one line: "Yesterday was about you. Today is about the room you build for other people to work in."

Module 2.1 — What People Actually Want (9:00–10:15)

LEARNING OBJECTIVES

Participants will be able to:

- Name the three things people most consistently want from a leader and explain why compensation is not the primary lever
- Audit their own team's environment against what their people would actually say
- Identify two low-cost, high-impact changes to their team's working conditions

CORE CONCEPT

Ask a room of managers what their people want more of and most will say money. Money matters — it has to be fair, and unfairness is corrosive — but past a threshold it is a weak motivator of discretionary effort, and it is the answer people give when they have not been asked a better question.

What people consistently say they want from a leader clusters into three things:

Inclusion, not exclusion. Being asked before the decision, not told after it. Having their read sought on things that affect them. The opposite of inclusion is not hostility; it is being informed.

Appreciation, not being taken for granted. Specific, timely recognition of something actually done. The opposite of appreciation is not criticism; it is silence.

Accountability — theirs, and their colleagues'. This one surprises people. High performers want to be held to a standard, and they want their peers held to the same one. Nothing demoralizes a strong team faster than watching someone underperform without consequence. Under-accountability reads as *nobody cares* — and if nobody cares, why should I?

Then say the thing that makes this uncomfortable: **the only version of a high-performance environment that matters is your team's, not yours.** A leader who implements what worked at their last company, or what they personally would have wanted as a rep, is guessing. The people who know what conditions would let them do their best work are the people doing the work. There is exactly one way to find out, and it is not a survey with a Likert scale.

Note the cost profile: almost nothing on this list is expensive. Clear priorities, honest information, being asked, being thanked, being held to something — these cost attention, not budget. Which is why they are so often absent. Attention is the scarce thing.

STORY

What Renewal Team 3 Asked For

Priya Raghunathan inherited a mid-market renewals team with the worst attrition in the org — four departures in eleven months on a team of nine. The exit interviews all said some version of "compensation."

Priya had a comp case ready to take upstairs. Before she took it, she did something her predecessor had not: she got the team in a room, took the whiteboard marker, and asked one question. *"What would have to be true here for this to be the best job you've had?"* Then she shut up. The first ninety seconds were painful. She let them be painful.

The list they built over forty minutes had nineteen items on it. Compensation was on the list. It was ninth.

Above it: Stop finding out about product changes from the customer. Tell us the renewal target for the quarter before the quarter starts, not in week three. Somebody deal with Reggie — a CSM who had not hit a number in five quarters and whose accounts kept landing on everyone else's plate. Let us say no to the escalation queue after 6pm. Give us thirty minutes with the PM team once a month.

Priya could fix six of the top eight inside two weeks, at a cost of roughly zero dollars. The seventh — Reggie — took her four months and was the hardest thing she did that year. The eighth required a standing meeting she had to argue for.

Attrition over the following twelve months: one departure, an internal promotion. She never did submit the comp case.

The line she uses when she tells this story: "They didn't want more money. They wanted to stop being embarrassed in front of their customers."

Debrief questions:

- Why did the exit interviews say compensation? What does that tell you about exit interviews?
- Six of the top eight items cost nothing. Why hadn't anyone done them?
- "Somebody deal with Reggie" was on a list about the *environment*. Why does an unaddressed underperformer belong there?
- What would be on your team's list, and how confident are you? Rate it 0–10.

EXERCISE — THE ENVIRONMENT AUDIT (25 MINUTES)

Step 1 (8 min, individual). On **Worksheet 5 — Environment Audit**, participants write the ten things they believe their team would put on Priya's list, in the order the team would rank them.

Step 2 (12 min, table groups). Each person reads their top three. Table members ask: *"How do you know?"* The only acceptable answers are that someone told them directly or that they observed it. Inference does not count. Most participants will discover that most of their list is inference.

Step 3 (5 min, individual). Each person schedules the actual conversation. A date, an attendee list, and the single question they will open with. Written down.

GROUP DISCUSSION (10 MINUTES)

- 1 How much of your list was inference rather than evidence?
- 2 What stops you from just asking? Name the real reason, not the calendar one.
- 3 What are you afraid they will say? What would you do if they said it?

FACILITATOR NOTE

Someone will object that asking the team what they want creates expectations you cannot meet. This is a serious objection and deserves a real answer, not a dismissal. The answer: you are not committing to deliver everything, you are committing to *respond* to everything — which means telling them plainly what you will do, what you won't, and why. The environment is degraded by unanswered requests, not by declined ones. Say this clearly; it is the difference between inclusion and theater.

Module 2.2 — Shared Expectations (10:30–12:00)

LEARNING OBJECTIVES

Participants will be able to:

- Explain why unstated expectations are the most common cause of performance friction
- Run a structured expectations conversation in both directions
- Identify the largest gap between what they expect and what their people believe they expect

CORE CONCEPT

A large share of what gets diagnosed as a performance problem, an attitude problem, or a "not a culture fit" problem is something much more boring: two people operating on different, unstated, sincerely-held assumptions about what was expected.

The failure is rarely dramatic. It is a manager who assumes that "own the account" includes proactive executive outreach, and a CSM who assumes it means responding well when the executive reaches out. Both are behaving correctly according to their own understanding. Six months later there is a churn event and a difficult conversation, and both people are genuinely bewildered.

Shared expectations is a three-step process, and all three steps are required:

- 1 State it.** Face to face, out loud, specifically. "Here is what I expect of you."
- 2 Clarify it.** What does that actually mean in practice? What does good look like? What does failing look like? This step is where the vagueness gets removed — and vague expectations are worse than none, because both parties believe they have an agreement.
- 3 Confirm and commit.** Both people say it back and agree. Explicitly.

Two things to emphasize:

It runs both ways. The conversation is incomplete if the leader has stated expectations and not asked for them. "What do you need from me? What do you expect of me that you're not getting?" A leader who has never been told what their team expects of them is leading blind, and is almost certainly failing someone in a way they could fix in an afternoon.

It is not the annual review. Formalizing this into a twice-a-year event sends the message that this is the only time the conversation is permitted. The annual review is a compliance artifact; the ongoing, informal, specific version is where the work actually happens. If your expectations conversations happen on a schedule set by HR, they are happening too rarely and too late.

STORY

The Two Lists

At the request of a VP, a facilitator ran a simple exercise with a director and one of her senior AEs whose relationship had degraded to the point of being raised as a retention risk. Separately, each was asked to write two lists: *what I expect of the other person*, and *what I think the other person expects of me*. Neither saw the other's answers until both were finished.

The AE's list of what he thought his director expected of him had eleven items. Seven were about activity metrics — call volume, meetings booked, CRM hygiene, pipeline coverage ratio. He had been optimizing hard against all seven for a year, and resented every one of them.

The director's actual list had five items. None of the seven activity metrics appeared. Her top item was: *bring me the deals that are going sideways early enough that I can help*. Her second was: *mentor the two juniors on the team; they'll follow you and they won't follow me*.

The AE had never been told either of those things. He had inferred his expectations from what was inspected on the Monday call, which is what everybody does. And the director, when asked why she had never said the two things that actually mattered to her, said something that is worth quoting to the room: *"I assumed it was obvious."*

Neither person was performing badly. They had never once compared notes.

Debrief questions:

- Where did the AE's list of eleven come from? What does that say about the relationship between what you inspect and what people believe you value?
- The director's answer was "I assumed it was obvious." What are you currently assuming is obvious?
- What would this conversation have cost in time, and what did *not* having it cost?

EXERCISE — THE FOUR QUESTIONS (35 MINUTES)

This is the core exercise of the module. Participants complete **Worksheet 6 — Shared Expectations Grid** for one specific person on their team.

The four questions:

- 1 What do I expect of this person? (Be specific. "Ownership" is not an expectation; it is a word.)
- 2 What do I think they believe I expect of them?
- 3 What do I expect of my own manager?
- 4 What do I think my manager believes I expect of them?

Step 1 (12 min, individual, silent). Complete all four quadrants.

Step 2 (8 min, individual). Compare quadrants 1 and 2. Circle every item that appears in one and not the other. That set is the gap, and it is where your friction is coming from.

Step 3 (10 min, triads). Each person presents their largest gap and answers one question from the group: *"What has that gap already cost you?"*

Step 4 (5 min). Reference the sealed pre-work sentence — *if my team were asked what I expect of them, what would they say?* Participants open it and compare it to quadrant 2. Ask for a show of hands: whose pre-work answer now looks optimistic?

GROUP DISCUSSION (10 MINUTES)

- 1 Which quadrant was hardest to fill in? Almost everyone says 2 or 4. Why is that significant?
- 2 What is the cost of the gap you found — in time, in performance, in the relationship?
- 3 When will you have this conversation? With whom, first?

TRANSITION TO LUNCH

"You now have a specific conversation to have with a specific person. After lunch we're going to talk about the conversation you've been avoiding for longer."

Module 2.3 — The Mismatch You Haven't Named (1:00–2:15)

LEARNING OBJECTIVES

Participants will be able to:

- Articulate the full cost of an unaddressed role mismatch, including the costs that do not appear in any report
- Distinguish a coachable performance gap from a genuine mismatch
- Commit to a specific next action on a situation they have been avoiding

CORE CONCEPT

Every leader in the room has someone in mind. This module is about that person.

Start with the distinction, because it is the one that matters. Not every struggling person is a mismatch. Most are not. A performance gap that responds to coaching, clearer expectations, or a change in conditions is a *coaching situation*, and Day 4 is entirely about those. A mismatch is different: it is a genuine misfit between a person and a role, where the gap persists after the expectations have been made clear and real coaching has been applied. Leaders make errors in both directions — writing people off who needed clarity, and coaching for years past the point where coaching was the answer.

Say plainly: **the most common error in this room is not being too quick to act. It is waiting far too long.** In hiring, you can only ever do your best — the interviews, the references, the panel — and you will still be wrong sometimes. What separates strong teams is not selection accuracy. It is what happens in month three when you realize it isn't working.

What usually happens is nothing. And the reasons are entirely human: it feels cruel, it is administratively painful, we tell ourselves the next quarter will be different, and we would rather absorb a known cost than create an acute one.

The costs of not acting, which nobody adds up:

- The work quietly redistributes to your strongest people, who notice
- Your standard becomes visibly negotiable, which affects everyone
- Peers who *are* delivering conclude that delivery is optional
- Your own attention is consumed disproportionately by one person
- And the person themselves loses years in a role where they cannot succeed

That last one deserves weight. It is frequently the case that the person knows before the leader does. Leaders who finally have the conversation are often startled by the relief on the other side of the table — and it is not unusual to hear from someone a year later that it was the push they needed.

Two guardrails, stated explicitly to the room: first, everything here is downstream of having done the work — clear expectations, real coaching, honest feedback delivered in time to be useful. Acting fast on someone who was never told what was expected is not decisiveness, it is negligence. Second, at UKG this is never a solo decision; it runs through your HRBP and the established performance process. What this module asks of you is not to act unilaterally. It is to stop pretending you do not know.

STORY

Three Years of Ellis

Ellis was hired into a solutions consulting role by a director who thought he was a strong candidate with a gap in one area that could be closed.

By month three the director knew. Ellis was technically capable but could not read a room — he answered the question that was asked instead of the question behind it, and in discovery calls he would go deep on architecture while the economic buyer waited. Two AEs had quietly requested a different SC.

The director's plan was to coach it. That was the right instinct, and for a while he executed it: he did ride-alongs, gave feedback, built a development plan. Around month seven the coaching had stopped being coaching and had become the absence of a decision. By month nine, the director had stopped putting Ellis on competitive deals. By month fourteen, Ellis was staffed almost entirely on renewals and technical documentation — work that needed doing, work Ellis was fine at, and work that had nothing to do with the job he was hired for or reviewed against.

Nobody ever told Ellis this had happened. His reviews said "meets expectations," because writing anything else would have required a conversation.

Three years in, the director left. His replacement looked at the team, talked to the AEs, and had the conversation in her fourth week. Ellis's response, almost verbatim: *"I've known for two years. I kept waiting for someone to say something. I thought if I brought it up I'd be admitting I couldn't do it."*

Ellis moved to a technical enablement role at another company and by all accounts is thriving. He was thirty-one when he was hired, thirty-four when the conversation finally happened.

The three-year cost: two AEs who worked around the problem and drew conclusions about what the org tolerated, a director whose credibility on standards was quietly spent, a team that learned that "meets expectations" meant nothing — and three years of a capable person's career spent in the wrong seat.

Debrief questions:

- Month seven is the hinge — coaching became avoidance. What would have distinguished the two at the time? What is the test?
- The director wrote "meets expectations" for three years. What was he protecting?
- Ellis knew for two years and said nothing. What made it impossible for him to raise it, and what would have made it possible?
- Who is your Ellis? You do not have to say the name.

EXERCISE — THE COST LEDGER (25 MINUTES)

Step 1 (10 min, individual). Using **Worksheet 7 — The Cost Ledger**, participants take the situation they have been avoiding and total the cost across six columns: their own time, the redistributed work, the effect on peers, the effect on customers, the effect on the person themselves, and the elapsed time to date.

Step 2 (10 min, pairs). Present the ledger. The partner asks three questions only:

- What are you actually protecting by not acting?
- What have you already tried, specifically, and how long ago?
- What is the smallest honest next step?

Step 3 (5 min, individual). Write the next step, with a date. For most people the next step is *not* a termination — it is an honest conversation that has never been had, or a call to their HRBP.

GROUP DISCUSSION (10 MINUTES)

- 1 What did the elapsed-time column say? Read the number out.
- 2 What is the difference between the coaching you have done and the coaching you have described yourself as doing?
- 3 What would you tell a peer sitting on the situation you're sitting on?

FACILITATOR NOTE

This module lands hard, particularly on newer leaders who may be carrying real guilt. Keep the frame on *clarity as a kindness* rather than on toughness. The message is not "act faster." It is "stop letting the absence of a decision function as a decision — because it is one, and the person is living inside it."

Watch the room. If someone goes quiet and stays quiet, find them at the break.

Module 2.4 — Change: Growth or Grief (2:30–3:45)

LEARNING OBJECTIVES

Participants will be able to:

- Explain why people resist being changed rather than change itself
- Assess whether they have the trust balance required to ask for a change
- Position a specific upcoming change from the perspective of each person it affects

CORE CONCEPT

GTM organizations run on continuous change: territories, comp plans, segmentation, tooling, process, leadership. A GTM leader is, structurally, a change agent whether or not they signed up for it. And most changes are implemented badly — not because the change was wrong, but because the implementation ignored how humans process it.

Three ideas do most of the work here.

First: people don't resist change nearly as much as they resist being changed. The resistance is rarely about the substance. It is about exclusion from the decision. A person included in shaping a change will defend it; the same person, handed the same change as a finished decision, will find every flaw in it. This is not irrationality — it is a reasonable response to having something done *to* you.

Second: every person evaluates a change through one question first. *How does this affect me?* Not "is this good for the business." That question comes second, if at all, and it comes faster for people who have already had the first one answered. A leader who announces a territory change and leads with market logic has answered the wrong question, and will spend the next three weeks re-litigating it in one-on-ones.

Third: change draws down a trust balance you have to have built already. Think of trust as an account. Every kept commitment, every straight answer, every time you took the hit for the team is a deposit. Every surprise, every reversal, every time someone found out from someone else is a withdrawal. A change is a large withdrawal. Attempt it with an empty account and it fails — not on the merits, but because there is nothing to draw against. This is why the same reorg succeeds under one leader and fails under another.

Timing is a real variable. The right change at the wrong time produces the same result as the wrong change. Before announcing, ask honestly: is now the time? What else is this team absorbing right now?

Lead by example, and understand that you are being watched more closely than you think. A leader who announces a change and is visibly ambivalent about it has authorized ambivalence. If you cannot get behind it, that is a conversation to have upward, before the announcement, not a signal to leak downward after it.

STORY

Two Territory Cuts

Same company, same fiscal year, two divisions, structurally near-identical territory realignments. Both moved roughly 20% of named accounts. Both were, on the merits, correct.

Colin's division. The announcement came in a 45-minute all-hands on a Tuesday. The deck was excellent — market data, coverage analysis, a clean rationale. Colin took questions for the last ten minutes. Two people asked questions, both procedural. He read the room as aligned.

What actually happened: every rep in that room spent the presentation doing one calculation, and it was not about coverage models. It was *which of my accounts am I losing and what does that do to my number*. Nobody had answered it, so nobody heard anything else. Over the following three weeks Colin had fourteen unscheduled one-on-ones, each of which relitigated the whole design. Two reps resigned, one of whom had not actually lost anything material but had concluded the org was unstable. The change took five months to settle.

Nadia's division. Nadia started six weeks earlier, and not with an announcement. She took the draft to four reps individually — deliberately including the two most vocal skeptics — and asked one question: *"Where does this break?"* Three of the four found genuine problems. She changed the model twice as a result, once significantly.

By the time of the all-hands, four reps in the room had already shaped it, and two of them said so unprompted. Nadia opened not with market data but with the sentence: *"Before I explain why, I'm going to show you exactly what changes for each of you, and then we'll talk about how we protect your number."* She had a per-person sheet for every rep, prepared in advance, showing accounts in, accounts out, and the quota adjustment.

Market rationale came second, and took four minutes.

The change settled in about three weeks. No regretted attrition. One of the skeptics she had consulted early became the person who explained the model to new hires.

Debrief questions:

- Colin's deck was better than Nadia's. Why did his fail?
- Nadia gave up something real by consulting first — she lost control of the design and had to change it twice. Was that a cost or a benefit?
- Nadia deliberately included the skeptics. Why not the supporters?
- What in the last year did you roll out like Colin? What would the per-person sheet have been?

EXERCISE — THE CHANGE POSITIONING CANVAS (30 MINUTES)

Each participant takes one real change they are about to make or are in the middle of.

Step 1 (12 min, individual). On **Worksheet 8 — Change Positioning Canvas**, list every person materially affected. For each, write the honest answer to *how does this affect them* — from their seat, in their words, including the parts that are bad for them.

Step 2 (5 min, individual). For each person, rate the trust balance 0–10. Note anyone under 5; those people need a conversation before the announcement, not after.

Step 3 (8 min, pairs). Partner stress-tests: "*Where does this break?*" — the Nadia question. Partner plays the most skeptical person on the list.

Step 4 (5 min, individual). Write the sequencing plan: who hears it first, individually, and when. Who helps shape it before it is final.

GROUP DISCUSSION (10 MINUTES)

- 1 Who on your list has a trust balance under 5? What did you do to spend it down?
- 2 What did your partner find that you had missed?
- 3 What is the honest answer to "is now the right time"?

Day 2 Commitments and Close (3:45–4:30)

Silent writing (10 min). Three commitments, each with a name and a date:

- The environment conversation I will run with my team
- The expectations conversation I will have, and with whom
- The avoided situation I will move on, and the specific next step

Triads (15 min). Each person reads all three. The group's only job is to make each one more specific. Vague commitments are returned for revision.

Full room (10 min). Ask only for the avoided-situation commitments. Six or seven volunteers. No commentary.

Close (5 min). "Days 1 and 2 have handed you a stack of conversations to go have. Tomorrow is about how to actually have them — which turns out to be mostly about not talking."

DAY 3

Lead with your Ears

Day objective. By the end of Day 3, participants can name their own listening failure modes and interrupt them, adapt their communication to a person whose style differs from their own, use five specific language practices that change the quality of team conversation, and articulate a vision for their team that connects a person's daily work to something worth doing.

Day arc. Listening first, because it is the foundation and because it is the skill leaders most reliably overrate in themselves. Then style versatility. Then the language practices that shape team culture. Then vision — which is the one thing on Day 3 that requires the leader to talk.

TIME	MODULE
8:30	Open
9:00	3.1 The Listening Problem
10:15	Break
10:30	3.2 Versatility
12:00	Lunch
1:00	3.3 The Language of Success
2:15	Break
2:30	3.4 Shared Vision
3:45	Commitments and close
4:30	End

Open (8:30–9:00)

Open with a live demonstration rather than a frame.

The exercise. Pairs. Person A talks for two minutes about something genuinely unresolved at work — not a war story, something they have not figured out. Person B may not speak at all. No sounds, no "mm-hm," nothing. Two full minutes.

Then switch. Then debrief with three questions:

- Talkers: what happened around the ninety-second mark? (Most will report that they got past their prepared version and into something they had not articulated before.)
- Listeners: how uncomfortable was that, and what were you doing internally?
- Listeners: how many of you were constructing your response instead of listening?

Land it: "Almost every one of you found two minutes of silence physically difficult. That's the subject of the morning."

Module 3.1 — The Listening Problem (9:00–10:15)

LEARNING OBJECTIVES

Participants will be able to:

- Identify the four common failure modes in their own listening
- Apply two specific techniques that measurably change conversation quality
- Explain why the listener, not the talker, controls a conversation

CORE CONCEPT

Leaders spend the overwhelming majority of their working communication either listening or being listened to — far more than reading and writing combined. It is the highest-volume skill in the job and essentially the only one nobody was ever trained in.

There is also a straightforward argument for why it matters that has nothing to do with being nice: **when you are talking, you are repeating something you already know. When you are listening, you might learn something you don't.** A leader's core problem is that they are making decisions on incomplete information. Talking cannot fix that. Only listening can.

And it does a second job simultaneously. Being genuinely heard is one of the strongest signals of inclusion and appreciation a person can receive — the two things Day 2 established that people most want. Listening is not a communication technique that happens to be polite. It is the delivery mechanism for the environment you decided yesterday to build.

Four failure modes. Name each one, get a show of hands for who recognizes it in themselves, then give the countermeasure.

1. The compulsion to talk. The pressure to speak before you are ready to listen. It spikes predictably under five conditions: when you are being challenged and want to defend yourself; when you are annoyed; when you are enthusiastic about your own idea; when you hear a question you know the answer to; and when there is silence. Enthusiasm is the sneaky one — it feels like engagement and it is the same behavior.

Countermeasure: recognize the trigger and stop. If recognition alone is not enough, use a physical interrupt. Several leaders report that biting their tongue — literally — is the only thing that reliably works. Say this; the room will laugh, and several will try it.

2. Lock-on / lock-out. The mind holds one primary thought at a time. Someone says something that grabs you — you lock onto it, and lock out everything they say afterward. You are now waiting for their lips to stop moving. The tells in others: fidgeting, shifting posture, breaking eye contact, throat-clearing. People clear their throat immediately before they speak.

Countermeasure: write the thought down. One or two words on a pad. It parks the thought so you can return to it and frees your attention. And when you see the tells in someone else, stop talking — they stopped listening a while ago.

3. Answering too fast. In ordinary business conversation, the elapsed time between one person asking a question and the other either answering it themselves or asking a different one is often under a second. Nobody is thinking in that gap. The question was ceremonial.

Countermeasure: deliberate silence at two points — after you ask a question, and after the other person finishes answering. Three or four seconds each. It feels endless and it is invisible to the other person. The first pause improves the quality of what you get; the second improves your understanding of it, and reliably produces a second, better answer that the person would not otherwise have given.

4. Listening to respond rather than to understand. The most common and most consequential. Seek first to understand, then to be understood — and go one further: listen not to respond, but to actually understand. Most business listening is a queue-management exercise where you hold your response and wait for an opening.

Countermeasure: before responding, be able to state their position well enough that they would agree with your summary.

The control point. Many leaders resist all of this because not talking feels like losing control of the conversation. This confuses *dominating* with *controlling*. The person doing the most talking is dominating. The person listening — choosing what to ask, deciding where the conversation goes next, holding the information — is in control. You control a conversation by listening to it.

The three conversations. In every exchange there are three conversations running: the spoken one, the one running in the other person's head, and the one running in yours. The one with the most value to you is the one you cannot hear. Short of telepathy, there is exactly one way to access it — ask, then be quiet. The questions that work are broad and low-pressure: *"Tell me what you're thinking."* *"How does that land for you?"* *"What am I missing?"*

A working rule: never talk for more than two minutes without giving the other person a way in.

STORY

The Renewal Nobody Heard

A CSM named Devi flagged an account in her one-on-one. The way she put it: "Something feels off at Brightpath. I can't point to anything specific."

Her manager, reasonably, went to the data. Usage was flat but healthy. NPS from the last survey was a 9. The exec sponsor had joined a webinar three weeks earlier. Support tickets were normal. He walked her through all four data points, told her the signals were good, and suggested she was overthinking it. The whole exchange took about ninety seconds. He was being helpful.

Brightpath churned four months later.

In the post-mortem, Devi said she had noticed three things she had not been able to assemble into an argument: her main champion had stopped copying a particular VP on threads; two people had left the customer's team without backfills being mentioned; and the champion had used the phrase "if we're still using this next year" in a passing joke on a call.

None of that was in a dashboard. All of it was in Devi's head, in the second conversation, and it needed about six minutes and one question — *"Tell me more about 'off'"* — to get out.

Her manager's ninety-second answer was faster, more efficient, and cost a seven-figure renewal.

Debrief questions:

- The manager did nothing wrong by conventional standards. What exactly was the error?
- Devi said "I can't point to anything specific." How should a leader treat that sentence?
- What would the six-minute version of that conversation have sounded like? Write the first three questions.
- What have you been told this month that you answered instead of explored?

EXERCISE — THE SIX-MINUTE VERSION (25 MINUTES)

Triads. Rotating roles: speaker, listener, observer.

Speaker brings a real, genuinely unresolved situation from their team.

Listener has three constraints: pause three seconds after asking anything, pause three seconds after the speaker finishes, and may not offer a single suggestion. Questions only.

Observer tracks on **Worksheet 9 — Listening Observation Sheet**: number of questions asked, number of suggestions offered, longest stretch of listener silence, and the moment the speaker said something they had clearly not articulated before.

Six minutes per round, two minutes of feedback, three rounds.

Debrief (7 minutes):

- Speakers: what did you say that you had not said before? At what point?
- Listeners: what was the hardest constraint?
- Observers: what did you see the listener miss?

GROUP DISCUSSION (10 MINUTES)

- 1 Which of the four failure modes is most yours? What triggers it?
- 2 Where would three seconds of silence have changed an outcome for you in the last month?
- 3 What would your team notice if you asked twice as many questions next week?

Module 3.2 — Versatility (10:30–12:00)

LEARNING OBJECTIVES

Participants will be able to:

- Identify their own communication style and its effect on others
- Read another person's style from observable behavior
- Adapt their approach to keep the other person receptive

CORE CONCEPT

Leading everyone in the style that is natural to you means you are effective with the portion of your team that happens to share your wiring, and are working against yourself with the rest.

Two observable dimensions produce a useful working model.

Responsiveness — how much emotion a person shows. High: relaxed, warm, informal, personal. Low: formal, contained, precise, guarded.

Assertiveness — how much a person pushes. High: fast, direct, time-pressured, decisive. Low: measured, patient, accommodating, deliberate.

Crossing them gives four rough patterns:

Higher responsiveness	Amiable — relationship first, avoids risk, needs to feel safe, values being appreciated, decides slowly, dislikes being rushed	Expressive — big picture, fast, enthusiastic, dislikes detail, needs recognition, decides on instinct
Lower responsiveness	Analytical — detail, evidence, process, needs to be right, minimizes risk, decides slowly and thoroughly	Driver — results, speed, control, wants options not recommendations, decides immediately, low patience for context

Three things to say clearly:

There is no best style, and no leadership style. Every one of these produces excellent leaders. This is not a personality test and it is not a verdict.

The point is versatility, not accuracy. The goal is not to correctly classify people; it is to notice when someone is uncomfortable and adjust so they stay receptive. Nobody evaluates an idea on its merits while they are uncomfortable — and if they find something wrong with you, they will find something wrong with your message.

Watch the diagonal. The style diagonal from yours wants the opposite of what you want, and that relationship is where your unexplained friction lives. A Driver manager and an Amiable rep will each experience the other as the problem. Have participants find their diagonal and name the person.

Stress reveals style. Under pressure, the patterns sharpen: Expressives tend to attack, Amiables tend to go along, Analyticals tend to avoid, Drivers tend to become autocratic. If you are unsure of someone's style, remember the last time you saw them under real pressure.

Practical adjustments:

- **With an Analytical:** slow down, bring the data, be thorough, reduce their risk, stay businesslike. Do not open with enthusiasm; it reads as unserious.
- **With a Driver:** get to it, lead with the outcome, offer options rather than a recommendation, respect their time, do not narrate your reasoning unless asked.
- **With an Amiable:** allow time, be personal before transactional, provide reassurance, do not force an immediate decision, follow through visibly on small things.
- **With an Expressive:** move fast, stay on the big picture, be energetic, give recognition, and put the details in writing afterward because they will not retain them.

STORY

The Same Message, Four Times

A director named Sam had to tell four reps that their patch was being reduced by roughly the same amount. Sam is a Driver: fast, direct, outcome-first. He sent essentially the same message to all four, back to back, on a Thursday afternoon.

Rep 1 (Driver) replied in four minutes: "Understood. What's the new number?" Handled.

Rep 2 (Analytical) replied in two days with a fourteen-point document questioning the methodology. Sam read it as resistance. It was not resistance — it was an Analytical trying to establish whether the decision was sound, which is the precondition for their commitment. Sam's terse reply confirmed the worst reading, and it took six weeks to recover.

Rep 3 (Amiable) replied "Sounds good, thanks Sam" within the hour, and said nothing else for five weeks. Then resigned. In her exit conversation she said she had assumed the account reduction was the first step in being managed out, and that she had not felt able to ask.

Rep 4 (Expressive) called Sam immediately, talked for twenty minutes, seemed energized by the end of it, and then behaved for a month as though the conversation had not happened — because for an Expressive the conversation was the processing, and none of the specifics had landed. Nothing was in writing.

One message. One sender. Four completely different outcomes, and three of them were expensive.

The version that would have worked: the same decision, delivered four ways. Two sentences and a number for Rep 1. A pre-read with the methodology for Rep 2, plus an offer to walk through it. A live conversation for Rep 3 that opened with "this is not about your performance, and I want to say that first." A call for Rep 4, followed by a written summary the same day.

Same decision. Maybe forty extra minutes of Sam's time.

Debrief questions:

- Sam treated all four identically, which feels fair. Why was it not?
- Rep 3 resigned over something that was never said. Whose responsibility is that?
- Which of the four are you? Which of the four is your hardest report?
- What message have you sent recently that landed in four different ways?

EXERCISE — STYLE READ AND REWRITE (30 MINUTES)

Step 1 (8 min, individual). On **Worksheet 10 — Versatility Plan**, participants place themselves on the grid, then place each of their direct reports, using observed behavior as evidence. Each placement requires one piece of evidence.

Step 2 (7 min, individual). Identify the report on the diagonal from them. Write down the last time there was friction with that person and what the friction was about on the surface.

Step 3 (15 min, pairs). Each participant takes a real message they need to deliver in the next two weeks and writes it twice — once as they naturally would, once adapted for the diagonal person. The partner reads both and says which one they would rather receive, and why.

GROUP DISCUSSION (10 MINUTES)

- 1 What did you learn about your diagonal relationship?
- 2 Where has a style mismatch been mistaken for a performance or attitude problem on your team?
- 3 What is the smallest adaptation that would make the biggest difference with one person?

FACILITATOR NOTE

Someone will call this reductive, and they are partly right — four boxes cannot hold a person. Agree with them, and reframe: the model's value is not classification, it is the habit of asking “*how does this land for them?*” before sending. Anyone who leaves with that habit and no memory of the four labels has got the point.

Module 3.3 — The Language of Success (1:00–2:15)

LEARNING OBJECTIVES

Participants will be able to:

- Apply five specific language practices that change how a team thinks and works
- Identify which practice would most change their own team's conversations
- Recognize the unspoken conversations that are constraining their team

CORE CONCEPT

Culture is not made of values statements. It is made of repeated conversational practices. What is habitually said, asked, and left unsaid becomes how a team thinks — and a leader has more control over that than over almost anything else.

Five practices. Teach each one, then run the application exercise.

1. Move background conversations to the foreground.

Under the surface of most teams sit unspoken disagreements and interpersonal issues — a strong view about direction that never gets voiced, a resentment between two people that everyone works around, a belief that a decision was wrong that gets expressed only in the parking lot. These are enormously expensive precisely because they are never addressed. They cannot be resolved while they are invisible.

The leader's job is to surface them: *"What's the conversation we're not having?" "What would you say about this if I weren't in the room?"* Then be able to hear the answer without punishing it — because you get exactly one chance at this. Punish the first honest answer and you will never get another.

2. Shift from discussion to dialogue.

Discussion is the default mode of business, and it is competitive: I am attempting to bring you to my position. Dialogue is different — it is genuine openness to the possibility that the other view is better, or that a third option exists that neither of us brought.

Discussion asks *which of these is right?* Dialogue asks *what's actually true here, and what are we each assuming?* Most meetings that feel stuck are discussions that needed to be dialogues. Name the mode explicitly: "I want to be in dialogue on this for ten minutes before we decide anything."

3. Get alignment before agreement.

Alignment is *what* we are doing. Agreement is *how* we are doing it. Control-oriented leaders routinely jump to the how before securing commitment to the what — and then are surprised when deadlines slip and execution is soft.

If your team is not genuinely bought into *what* you are doing, their commitment to *how* is theater. Slipped deadlines are usually a symptom of an alignment failure that was papered over with an agreement.

4. Ask "what's missing?" rather than "who's wrong?"

Who or what is wrong points at the past, produces blame, and creates a culture where the safest move is to be uninvolved. *What's missing* points at the future, produces contribution, and gets you a better answer to the same underlying question.

Deal loss reviews are the clearest GTM example. "Why did we lose this?" gets you a defensive narrative. "What was missing that would have won it?" gets you something usable — and gets it from a person who is still willing to talk to you next quarter.

5. Replace *either/or* with *and/also*.

Leaders are trained to see trade-offs, and many trade-offs are real. But a great deal of *either/or* thinking is a habit rather than a constraint: grow the base or hunt new logos, move fast or be thorough, hold people accountable or support them, hit this quarter or build for next year.

Some tensions do not need to be resolved. They need to be managed, held simultaneously, both true at once. The most effective leaders operate comfortably in *and/also*, and the least effective spend enormous energy trying to collapse a paradox that was never going to collapse.

Useful test: when you catch yourself framing something as a choice between two things, ask whether the real answer is "both, in different proportions, at different times."

STORY

The Meeting Where Nobody Said the Thing

A GTM leadership team met every Monday for ninety minutes to review a stalled product-led growth motion. They met for eleven weeks. Every meeting produced actions. The motion did not improve.

In week twelve a facilitator sat in, and afterward asked each of the seven attendees privately what they actually thought.

Six of the seven said, unprompted and in almost identical language, that the motion was aimed at a segment that did not have the problem the product solved, and that no amount of execution would fix it. Six out of seven.

Not one had said it in the room. When asked why, the answers were: the VP had championed it publicly and it would look like an attack; there had been a decision and reopening it would seem like relitigating; and — the most common — *"I assumed I was the only one who thought that."*

Eleven weeks. Seven senior people. Roughly seventy-five hours of leadership time, plus a quarter of execution against a strategy that six of the seven believed was wrong before it started.

The unlock, in week thirteen, was one question from the VP: *"Before we go through actions — is there anyone here who thinks this motion is fundamentally wrong? I'm asking seriously, and there's no cost to saying yes."*

Then he waited. Nobody spoke for maybe fifteen seconds. Then one person said yes, and within two minutes all six were talking.

Debrief questions:

- Six people independently reached the same conclusion and none said it. What made silence the rational choice?
- The VP had to wait fifteen seconds. What would have happened if he had filled that silence?
- What is your team's version of this right now?
- What have you personally not said in a room in the last month?

EXERCISE — PRACTICE APPLICATION (25 MINUTES)

Step 1 (5 min, individual). On **Worksheet 11 — Language Practices**, participants rate their team 0–10 on each of the five practices and pick the one with the most upside.

Step 2 (10 min, table groups). Each person describes a specific recurring meeting or conversation and how the chosen practice would change it. The table gives them the exact opening sentence to use.

Step 3 (10 min, individual). Write the specific meeting, date, and opening line. Then answer: *what is the honest answer I am most afraid of hearing, and what will I do if I hear it?*

GROUP DISCUSSION (10 MINUTES)

- 1 Which practice did most of you pick? Why that one?
- 2 What is your team's background conversation? You do not have to give specifics — just say whether you know what it is.
- 3 Where are you stuck in an either/or that is actually an and/also?

Module 3.4 — Shared Vision (2:30–3:45)

LEARNING OBJECTIVES

Participants will be able to:

- Explain why a shared vision is a performance mechanism, not a communications exercise
- Articulate a vision for their team that connects individual work to something worth doing
- Convert a vision into goals with dates

CORE CONCEPT

This is the one module of Day 3 where the leader talks.

A vision does one thing that nothing else does: it tells people what their work is *for*. Two teams doing identical work — same tools, same accounts, same comp plan — will produce visibly different results depending on whether they understand what they are building. That difference is a leadership output.

Three properties of a vision that works:

It is about the future, and only the leader is reliably looking there. Everyone else is legitimately consumed by this quarter. If the leader is not looking eighteen months out, nobody is, and the team's future becomes wherever events happen to take it.

It is shared, not announced. A vision held by the leader alone is a private opinion. It becomes a force only when the team has helped shape it and can articulate it without the leader present. The test is simple: ask three people on the team separately and see whether you get the same answer.

It connects to the individual. A vision that does not answer *what does this mean for what I do on Tuesday* is decoration.

Then convert it. A vision without goals is a mood; goals without dates are dreams. Meaningful, achievable, exciting, dated.

STORY

Three Implementation Consultants

A prospective customer touring a professional services floor asked three consultants, at three different desks, the same question: *"What are you working on?"*

The first said: "Configuring pay rules. There are about four hundred of them and they all have exceptions. It's a slog, but somebody has to do it."

The second said: "I'm on the Meridian implementation — I've got the pay rules workstream, and we're about two weeks from the parallel run. There are six of us on it."

The third said: "Meridian has eleven thousand hourly employees, and about a third of them are getting paid wrong right now — mostly shift differentials, mostly people earning under twenty dollars an hour. When we go live in March, those people get paid correctly for the first time in years. I'm doing the pay rules, which is where most of that actually gets fixed."

Same work. Same four hundred pay rules. Same deadline.

The first consultant has a task. The second has a project. The third has a reason.

Ask the room which one is still there in two years. Then ask the harder question: which one of them was given something by their leader, and which two were left to find it on their own?

Debrief questions:

- Which consultant is yours? Be honest about the distribution across your team.
- Whose job is it to give the third consultant that framing?
- Can you state, in one sentence, what your team's work is for? Try it out loud right now.

EXERCISE — VISION DRAFT (35 MINUTES)

Step 1 (10 min, individual). On **Worksheet 12 — Vision to Reality**, draft a vision for the team, constrained to three sentences. It must answer: what will be true in eighteen months that is not true now; why that matters to a customer; and why it matters to the person doing the work.

Step 2 (10 min, triads). Read it aloud. The group asks two questions: *"Would a rep on your team repeat this without laughing?"* and *"What does this change about someone's Tuesday?"* Revise.

Step 3 (10 min, individual). Convert to three goals, each with a date and a named owner.

Step 4 (5 min, individual). Write the plan for building it *with* the team rather than presenting it: who helps shape it, when, and the question to open with.

GROUP DISCUSSION (10 MINUTES)

- 1 How many of you had a vision before today that your team could actually state? Hands.
- 2 What was hardest — the eighteen-month view, the customer connection, or the individual connection?
- 3 Who on your team should help shape this before it is final?

Day 3 Commitments and Close (3:45–4:30)

Silent writing (10 min).

- The listening behavior I am changing, and the specific conversation where I will use it
- The person I will adapt my style for, and how
- The language practice I am introducing, the meeting, and the opening line
- The three people who will help shape my team's vision

Pairs (10 min). Read and refine. Partner asks: *"What will you actually say?"* Push until they have said the sentence out loud.

Full room (15 min). Ask for opening lines only — the exact first sentence people will use. Six or seven volunteers. Hearing peers say the sentence aloud makes it repeatable.

Close (5 min). "Tomorrow we put all of it into one repeatable conversation — the single highest-leverage thing you do as a leader, and the thing most of you have never been trained to do or had done for you."

DAY 4

Coach for Commitment

Day objective. By the end of Day 4, participants can distinguish compliance from commitment and explain why the difference determines their ceiling, run a structured coaching conversation using a repeatable model, and leave with a written 90-day plan and a scheduled first conversation.

Day arc. Everything converges here. Day 1's orientation, Day 2's expectations and environment, Day 3's listening and language all become one repeatable practice. The morning teaches the model. The afternoon is practice — and practice is the point. Protect it.

TIME	MODULE
8:30	Open
9:00	4.1 Compliance and Commitment
10:00	4.2 The Coaching Conversation
10:45	Break
11:00	4.3 The CUS Model
12:00	Lunch
1:00	4.4 Practice Lab
2:30	Break
2:45	4.5 Credibility and the Discovery Mindset
3:30	4.6 Your 90-Day Charter
4:15	Close
4:30	End

Open (8:30–9:00)

Ask two questions and let the room sit with the answers.

How many times in your career has someone actually coached you? Not a review, not feedback in passing — a real conversation about your performance where the other person mostly listened.

Take a count. In most rooms it is very low, and a meaningful number of people say never. Let that number land.

And how many of you were ever taught how to do it for someone else?

Usually fewer.

Say it plainly: "Coaching is probably the single most underdeveloped skill available to leaders. Not because it's hard to understand — because almost nobody has been shown how, including most of the people who taught you what management looks like. That's what today fixes."

Module 4.1 — Compliance and Commitment (9:00–10:00)

LEARNING OBJECTIVES

Participants will be able to:

- Describe the mechanism by which authority-based management produces mediocre results
- Distinguish the levels of engagement between resistance and commitment
- Explain why discretionary effort is the only source of superior performance

CORE CONCEPT

Draw the traditional model on the flipchart, left to right:

people → power, authority, control → conformity and compliance → resentment
→ poor attitudes → struggling or mediocre results

Walk it. A manager governs from positional authority. People comply, because they have to. Underneath the compliance, resentment accumulates — at the job, the manager, and often at themselves for tolerating it. Resentment eventually surfaces as attitude. And the results are, at best, adequate and short-term.

The model is not evil. It works, in the narrow sense that it produces compliance. **The problem is its ceiling.** Authority reaches a person's hands and their calendar. It does not reach their judgment, their creativity, or their willingness to do the thing nobody asked for. In GTM, those are exactly the things that produce outlier results — the extra discovery call, the relationship built with no near-term deal, the honest forecast when an optimistic one would be more comfortable.

Now draw the alternative:

People → coaching → commitment → superior results

Note the capital P. The first model treats people as interchangeable capacity. The second treats them as the source of the result. And note what sits at the center of coaching: conversation. That is the whole tool.

The engagement ladder. Put it on the board bottom to top:

LEVEL	WHAT IT LOOKS LIKE
Resistant	Actively works against it
Compliant	Does what is required, nothing more
Cooperative	Helps when asked
Engaged	Brings energy and initiative
Committed	Owens the outcome; will make personal sacrifices for it

Then ask the room to place each of their team members privately. Most will find the bulk sitting at compliant or cooperative.

Two observable markers of a committed person:

- 1 **They are focused.** They know their priorities and can state them without looking anything up. Where people are unclear on priorities, commitment is structurally impossible — you cannot commit to something undefined. Which loops back to Day 2: fuzzy expectations produce uncommitted people, and it looks like an attitude problem.
- 2 **They will make personal sacrifices** for the team's outcome. And nobody does that in the absence of inclusion, appreciation, and accountability. Commitment is earned with the same currency Day 2 established.

The bridge to the rest of the day: if compliance is produced by authority, commitment is produced by conversation — specifically, by a leader sitting down with a person, one to one, regularly, and doing it well.

STORY**The Team That Complied**

A sales manager named Rich ran a team that never missed. Eight quarters, eight hits, occasionally by a hair but always green. He ran a famously tight operation: mandatory activity minimums, CRM hygiene inspected weekly, a strict deal review checklist, and a Monday call where every rep walked their commit. His director described him as the most reliable manager in the region.

Two things happened in the same quarter.

First, a competitor introduced a materially different packaging model that changed how deals needed to be structured. It took Rich's team about five months to adapt. Two other teams in the region adapted in six weeks. When Rich looked into why, he found that three of his reps had seen the shift early — one had flagged it in a Monday call in week two. The Monday call had thirty-one accounts to walk. There was no time, and the rep never raised it again.

Second, Rich's two strongest reps resigned within a month of each other. Neither went to a competitor for more money; both went to smaller companies for roles with more latitude. One of them, in her exit conversation, said something Rich repeated for years afterward: *"I always knew exactly what you wanted from me. I never once knew what you thought I was capable of."*

Rich's team was fully compliant and had been for two years. Compliance had been enough to hit the number in a stable market. It was not enough to adapt, and it was not enough to keep the two people whose commitment would have made adaptation possible.

Debrief questions:

- Eight quarters green. What should have been the warning sign, and would you have seen it?
- The rep flagged the shift in week two and never again. What in Rich's system taught her not to?
- "I never knew what you thought I was capable of." What is that sentence actually asking for?
- Where are you Rich? Which of your systems is producing compliance and calling it performance?

EXERCISE (15 MINUTES)

Individually, participants place every direct report on the engagement ladder, then answer for each: *what would move this person up one level?* Not two — one. Table discussion follows on what the answers have in common. The common answer, in most rooms, is a conversation nobody has had.

Module 4.2 — The Coaching Conversation (10:00–10:45)

LEARNING OBJECTIVES

Participants will be able to:

- Name the seven characteristics of an effective coaching conversation
- Distinguish coaching from feedback, performance management, and a check-in
- Prepare a specific conversation

CORE CONCEPT

First, clear the ground. Coaching is not:

- **A performance review.** Reviews are periodic, documented, and backward-looking. Coaching is frequent, informal, and forward-looking.
- **Feedback.** Feedback is something you deliver. Coaching is something you do *with* someone, and they talk more than you do.
- **A check-in.** "How's it going" is not coaching. It is a greeting.
- **Telling someone what to do.** This is the hardest one for GTM leaders, who are usually good at the job and can see the answer in ninety seconds. Giving the answer produces compliance with your answer. Helping someone reach it produces commitment to their own — and people are best convinced by reasons they discover themselves.

Seven characteristics of an effective coaching conversation:

- 1 **One to one.** Team coaching has a place; individual performance change happens privately.
- 2 **Performance related.** Anchored to something observable — a specific behavior or result, not a personality trait.
- 3 **Timely.** As close to the event as possible. If emotions are hot, wait — but wait hours, not months. A coaching conversation held at the annual review about something from March is not coaching; it is an ambush.
- 4 **Specific.** The most common failure. "You're always late to forecast calls" is unfalsifiable and invites the person to remember the one time they weren't, which they will. "You joined Monday's 9:00 call at 9:14, and six people waited" is unarguable and coachable.
- 5 **Managed.** You plan it and you steer it. Managed is not the same as dominated — roughly ninety percent of the time should be the other person talking. You are managing the shape, not filling the space.
- 6 **Relationship preserving.** You should be able to have this conversation and have the person still want to work for you. Note the distinction: a positive *working* relationship, which is required, is not a *friendship*, which is not.
- 7 **Future focused.** The past is evidence. The conversation is about what happens next.

Preparation. Ten minutes before the conversation, answer four questions: what am I trying to achieve; what specifically will I open with; what response might I get; and what does a good outcome look like for this person, not just for me.

EXERCISE (20 MINUTES)

Participants complete **Worksheet 13 — Coaching Conversation Planner** for a real person and a real issue. This is prep for the afternoon lab — they will use their own situation.

Pairs check each other's work against two tests: is the opening statement specific enough to be unarguable, and is it about the future rather than the failure?

Module 4.3 — The CUS Model (11:00–12:00)

LEARNING OBJECTIVES

Participants will be able to:

- Describe the three steps of the CUS model and the purpose of each
- Recognize the most common failure at each step
- Run the model in a low-stakes setting

CORE CONCEPT

A three-step structure for a coaching conversation: **Confront, Understand, Strategize.**

The name is deliberately ironic — this is the opposite of what "cussing someone out" looks like. It also makes it stick.

STEP 1 — CONFRONT (roughly 10% of the conversation)

Purpose: put the issue on the table cleanly enough that the person knows exactly what you are talking about, without triggering defensiveness.

Three rules:

- **Be specific.** One clear, concise statement of the issue. Observable facts.
- **One issue only.** The single most common failure. A leader who has been avoiding a conversation arrives with a backlog and unloads six things. The person cannot act on six, hears an indictment rather than an issue, and defends rather than engages. One.
- **Point forward, not backward.** Express what needs to change. Do not demand an explanation for the failure — "why did you..." puts the person into justification mode, and justification is not coaching.

Sounds like: "I want to talk about Monday's call with Halvorsen. You moved to the demo about four minutes in, before we knew what their close process looked like. I want to talk about how we handle that next time."

Not: "We need to talk about your discovery. And honestly your CRM notes have been thin too, and I noticed you were quiet in the team meeting."

STEP 2 — UNDERSTAND (roughly 70%)

Purpose: genuinely understand what is going on. This is the step people skip, and skipping it is why most coaching fails.

- **Drop your agenda.** You arrived with a theory. Your theory is frequently wrong, and it is always incomplete.
- **Focus on their concerns, not yours.** What do they see? What is in their way?
- **Seek first to understand, then to be understood.** This is where all of Day 3 gets used: the three-second pauses, the broad questions, the tolerance for silence, listening for the second conversation.
- **Agree on the issue and its causes** before going anywhere near a solution. If you skip to solutions without a shared diagnosis, you get compliance with your solution and nothing else.

Questions that work: "Walk me through how you saw that call." "What were you working with that I might not know about?" "What made the demo feel like the right move?" "What's getting in the way here?"

The single most common failure in the entire model happens here: the leader spends ninety seconds on Understand and then jumps to advice. Watch for it in the lab; it will happen in nearly every first round.

STEP 3 — STRATEGIZE (roughly 20%)

Purpose: they own the solution, and you both know what happens next.

- **They generate the solution.** Ask what they think should happen. Wait. Then wait more. If you supply it, they will comply with it; if they supply it, they will commit to it. The gap between those two is the entire reason this model exists.
- **Agree on follow-up.** Specific, dated. Without this the conversation was a chat.
- **Close positively and honestly.** Name the impact of the change and your genuine belief that they can make it. Not flattery — a real statement about their potential.

Five rules for running it:

- 1 **Coaching is helping people reach their own realizations.** People are best convinced by reasons they discover themselves.
- 2 **Coaching is letting go, not controlling.** Jumping in and fixing it is faster today and costs you every subsequent time.
- 3 **If you are talking more than 20% of the time, something has gone wrong.** Control comes from asking and listening, not from talking.
- 4 **Patience.** Give them a moment to think before you demand a response. If your style is shutting them down, you will get nothing usable.
- 5 **This runs on Day 3.** The pauses, the questions, the versatility. Without those, CUS is just a three-part lecture.

DEMONSTRATION — FACILITATOR FISHBOWL (20 MINUTES)

Do this live. Do not describe it.

Recruit a participant to play a rep. Brief them privately: *You are a solid AE. On a recent call you skipped discovery and went to demo. The real reason — which you will only disclose if genuinely asked and given room — is that the champion told you a competitor was demoing the following week and you panicked about being second.*

Run the full conversation in front of the room. Take about eight minutes. Deliberately model:

- A clean, specific, single-issue Confront
- A long Understand, including at least one silence you visibly have to sit through
- Letting the participant produce the solution even if it takes an uncomfortable pause

Then debrief (12 min):

- Ask the "rep": at what point did you decide to tell me the real reason? What made that possible?
- Ask the room: count how many times I asked versus told. What would have happened if I had given the answer at minute two?
- Ask the room: where was the silence, and what did it do?

Optional and effective if you have the nerve: run the same scenario badly first — jump to advice at ninety seconds, add a second issue, fill the silence. Then run it properly. The contrast teaches more than any explanation. Warn the room that the first version is deliberate.

Module 4.4 — Practice Lab (1:00–2:30)

This is the most important 90 minutes of the week. Do not let it compress.

STRUCTURE

Triads. Three rounds. Roles rotate: **Coach · Coachee · Observer.**

Each round: 12 minutes of conversation, 6 minutes of feedback, 2 minutes to reset. Three rounds = 60 minutes, plus setup and full-room debrief.

ROUNDS

Round 1 — Scenario cards. Use Appendix B. Low personal stakes, which lets people focus on the mechanics. Coachee plays the character on the card, including the hidden context.

Round 2 — Scenario cards, harder set. Appendix B, cards 5–8. These include a defensive coachee and one where the real issue is not the presenting issue.

Round 3 — Real situations. Each coach uses their own Worksheet 13 — a real person, a real issue. The coachee plays that person as accurately as they can from the coach's 60-second brief. This round is the one that transfers.

OBSERVER ROLE

Observers use **Worksheet 14 — CUS Observation Sheet** and track:

- Time spent in each of the three steps (actual minutes)
- Ratio of coach talking to coachee talking
- Number of questions asked vs. statements or suggestions made
- Longest silence the coach allowed
- Whether more than one issue was raised
- The exact moment the coachee said something the coach did not expect

FEEDBACK PROTOCOL

Strict order, no deviation:

- 1 Coachee first:** "What did it feel like to be on the receiving end?"
- 2 Observer second:** data only, no opinions. Read the numbers.
- 3 Coach last:** "What would you do differently?"
- 4 One thing.** The group names the single change for next round. Not three.

FACILITATOR FLOOR MANAGEMENT

Circulate constantly. You are looking for four things, and you will see all of them:

- **Advice at ninety seconds.** The most common. Interrupt gently: "Pause — are you in Understand yet?"
- **The stacked confront.** Two or three issues in the opening. Stop them and make them pick one.
- **Filled silence.** Coach asks a good question and answers it three seconds later. Name it in the moment; it is the most fixable error in the room.
- **The interrogation.** Questions with a predetermined destination — the coach knows the answer and is walking the person to it. Harder to spot and worth naming: "You asked six questions and you knew the answer to all of them. What would you have asked if you were actually curious?"

FULL-ROOM DEBRIEF (15 MINUTES)

- 1 What was hardest — Confront, Understand, or Strategize? (Understand wins in nearly every room.)
- 2 Coachees: what did the best coach in your triad do that the others didn't?
- 3 Observers: what was the average talk ratio? Compare to the 20% target.
- 4 What surprised you about being coached?

Close the lab with: "Nobody is good at this on day one. The leaders who are good at it are the ones who did it badly forty times and kept going."

Module 4.5 — Credibility and the Discovery Mindset (2:45–3:30)

LEARNING OBJECTIVES

Participants will be able to:

- Name the four characteristics people most consistently require of leaders they will follow
- Assess their own credibility honestly
- Distinguish a safety orientation from a discovery orientation and explain why the latter is required now

CORE CONCEPT: CREDIBILITY

Large-scale research into what people require of leaders they will willingly follow returns four characteristics with striking consistency across cultures and decades. People follow leaders who are:

Honest · Forward-looking · Inspiring · Competent

The underlying law is blunt: **if people do not believe the messenger, they will not believe the message.** Everything else in this program — the vision, the coaching, the change positioning — is downstream of credibility. Without it, the same words produce nothing.

Note that three of the four map directly onto how credibility is assessed in any domain: trustworthiness (honest), dynamism (inspiring), and expertise (competent). The fourth, forward-looking, is the specifically leadership one — people expect a leader to know where this is going.

Say the uncomfortable part: credibility is not built by declaration. It is built by a long series of small kept commitments, and it is spent quickly. Most leaders lose it not through a dramatic betrayal but through accumulated small breaches — the follow-up that never came, the answer that was technically true, the decision announced as though it had just been made when everyone knew it was made weeks ago.

STORY

The VP Who Kept One Promise

A VP inherited an org with badly damaged trust. Her predecessor had made a long series of commitments — a comp fix, a headcount plan, a tooling investment — and delivered on almost none of them, always with a reasonable explanation.

Her first all-hands, she was expected to lay out a plan. Instead she said roughly this: "I'm not going to make you a list of promises. You've had lists. I'm going to make one commitment, and you can judge me entirely on whether I keep it."

The commitment was small and specific: every Friday, she would publish a short written note stating what had changed that week, what she had decided, and what she had been unable to move. Including the things that had gone badly.

She did it for sixty-one consecutive weeks.

By about week twelve, people were reading it. By month six, other orgs had started asking for it. By the end of the year, when she asked the organization to absorb a genuinely painful segmentation change, it landed in about three weeks — because she had spent a year making deposits and had the balance to draw against.

The interesting detail: she was not a naturally inspiring speaker. Her all-hands were fine, not memorable. What she had was a demonstrated record of saying true things on a predictable schedule, which turned out to be worth more.

Debrief questions:

- Why one commitment instead of a plan?
- Which of the four characteristics was she building? Which was she not?
- What is your one commitment — the thing you could do every week without fail?
- Where have you spent credibility without noticing?

CORE CONCEPT: THE DISCOVERY MINDSET

Two orientations toward a changing environment.

The **safety mindset** says: *life is basically stable and predictable, and largely something I can control*. It seeks order, clings to what worked, and derives security from things going as expected. In a stable market this is workable. In a market that reprices, re-tools, and re-segments continuously, it is a slow failure — and worse, order and stability become anchors that hold you in a past your competitors have already left.

The **discovery mindset** says: *this is complex and constantly changing, and I find out what works in each situation*. It derives security from learning rather than from control, and it is comfortable saying *I don't know yet*.

SAFETY MINDSET	DISCOVERY MINDSET
Fights change	Uses change
Holds onto what worked	Reaches for what's next
Controls others	Trusts others and learns from them
Either / or	And / also
Independent	Interdependent
Plays not to lose	Plays to win

Note the last row, and land it for a GTM audience: playing not to lose is driven by avoiding the pain of being wrong. It is safe, and it produces the sandbagged forecast, the deal not pursued, the conversation not had, the territory not attacked. Every shot not taken has a 0% conversion rate.

Note also that the right-hand column is the entire week: interdependence from Day 1, trust from Day 2, and/also from Day 3, coaching from today.

EXERCISE (15 MINUTES)

Worksheet 15 — Credibility and Mindset. Participants score themselves 0–10 on each of the four credibility characteristics *as their team would score them*, then identify the lowest and write two specific actions. Then they mark themselves on the safety/discovery table row by row and name the row where the gap costs them most.

Pairs: "What is the one weekly commitment you could keep for a year?"

Module 4.6 — Your 90-Day Charter (3:30–4:15)

LEARNING OBJECTIVES

Participants will leave with a written, specific, dated plan and a first conversation on the calendar.

FLOW

Step 1 (5 min). Return the Day 1 commitment cards. Ask everyone to reread what they wrote on Monday and notice what has changed.

Step 2 (20 min, individual, silent). Complete **Worksheet 16 — 90-Day Leadership Charter**. Phones away; this is quiet writing time and you should protect it aggressively.

The charter has six fields:

- 1 The one sentence.** What kind of leader am I choosing to be? Not aspirational language — a sentence someone on my team would recognize as true if I lived it.
- 2 Three behaviors I am changing,** each stated observably, each with the person who will notice first.
- 3 My stop list.** What comes off the calendar to make room. Must be non-empty.
- 4 My first coaching conversation.** Name, issue, date within ten days.
- 5 My weekly commitment.** The one thing I will do every week without fail for 90 days.
- 6 My accountability.** Who I am sending this to, and when.

Step 3 (10 min, pairs). Read the charter aloud to a partner. The partner has one job: find the vaguest item and make them rewrite it. "Communicate better" gets sent back. "Ask one open question in every one-on-one before offering any opinion" survives.

Step 4 (10 min). Everyone opens their calendar and books, in the room, right now:

- Their first coaching conversation (within ten days)
- A 30-day, 60-day, and 90-day self-review block
- A conversation with their own manager to share the charter, within two weeks

Do not let anyone leave this step with an unbooked calendar. This is the single highest-yield five minutes of the week; the difference between programs that transfer and programs that don't is almost entirely whether the first conversation was on a calendar before people walked out.

Step 5. Partners exchange contact details and schedule a 30-day check-in with each other.

Close (4:15–4:30)

Return to the question from Monday morning.

When your team hits their number, how much of that is you?

Ask for hands again on the same scale. Say very little about the result.

Then close with something like this, in your own words:

"Four days ago the answer for a lot of you was 'a lot of it,' and it was said with some pride. If that's changed, it's not because you matter less. It's because the job changed underneath you at some point and nobody told you.

Nothing this week was complicated. Ask before you tell. Say what you expect. Deal with what you've been avoiding. Listen longer than is comfortable. Coach instead of fixing. None of it is hard to understand and almost none of it is common practice, which is the whole opportunity.

The difference between the leaders who do this and the ones who don't isn't knowledge. It's courage to start and the commitment to keep going when the quarter gets ugly and the old habits are right there.

Your title was appointed. Everything after that is earned."

Final action. Each participant reads only field one of their charter aloud — the one sentence. Fast, around the room, no commentary. End on the last person.

After the Program

For the facilitator:

- Send charter photographs back to participants at 30 days with one question: *which of your three behaviors is actually happening?*
- Run a 60-minute virtual cohort reconvene at day 45. Agenda: what worked, what didn't, one coaching conversation that went badly and what you learned.
- Send each participant's manager the reinforcement note (Appendix D2) within five business days. Manager reinforcement is the largest single variable in whether this transfers.

Measurement. Behavior change, not satisfaction. Recommended indicators at 90 days:

- Percentage of participants who held their first coaching conversation within 10 days (self-reported, cohort call)
- Change in coaching conversation frequency, from participants' own calendars
- Team-level engagement or manager-effectiveness scores at the next survey cycle, compared against a non-participant control group
- Voluntary attrition on participants' teams, 6 and 12 months out

Do not measure this program with a smile sheet. Ask the teams, not the participants.

Appendix a — Worksheets

Print as a participant workbook. Each worksheet is used at the point indicated. Leave generous white space when laying out for print — every worksheet in this program is meant to be written on by hand.

Worksheet 1 — The Independence Audit

Day 1, Module 1.1

Score each statement 0 (never) to 5 (almost always). Answer for how you actually behaved in the last 60 days, not how you intend to behave.

#	STATEMENT	SCORE
1	In deal or account reviews, I end up rewriting the strategy rather than improving theirs	
2	Deals above a certain size don't move without me in the room	
3	I do things for my team because it's faster than having them do it	
4	I'm the escalation path for problems my team could resolve	
5	When something is urgent, my instinct is to take it myself	
6	I know the details of my team's accounts better than they'd expect me to	
7	I find it hard to watch someone do something less well than I would	
8	My team checks with me before making decisions I'd be fine with them making	
9	If I were out for three weeks, meaningful things would stall	
10	I measure my own week partly by what I personally produced	

Total: _____ / 50

Below 15 — you have largely made the transition. 15–29 — you are in the middle of it, which is where most leaders live. 30+ — your independence is still doing the work, and it is capping your team.

The two items I scored highest:

What each of those costs my team:

Worksheet 2 — Orientation Audit

Day 1, Module 1.2

For each pair, mark where you sit on the scale. **Score twice:** circle for a normal week, square for your worst week this year.

SUPERIORITY ORIENTATION	1 — 2 — 3 — 4 — 5	SUPPORTIVE ORIENTATION
I tell people what to do		I ask people what they think first
I make the decisions		I push decisions to those closest to the work
I need to know everything happening		I trust people with things I don't see
I look for what's broken		I look for what's possible
I share information when needed		I share context generously, including bad news
I need to be right		I can be wrong out loud
My team waits for my direction		My team acts and tells me after
Delegation feels like risk		Delegation feels like leverage
I'm in most meetings that matter		My team runs meetings without me
I critique performance		I coach performance
I set the standard and enforce it		I set the standard with them and hold it
I know my team's numbers		I know what's in my team's way

Normal-week total: _____ Worst-week total: _____ Delta: _____

The item with the biggest delta:

What triggers that shift:

What my team would score me, honestly:

Worksheet 3 — Listening Post Design

Day 1, Module 1.3

What information reaches me last?

Who has it right now?

My listening post — a specific, recurring mechanism to get unfiltered front-line information:

FIELD	ANSWER
What it is	
How often	
Who is involved	
The one question I will ask	
First date on the calendar	
What I will NOT do with what I hear (e.g. no coaching debrief, no escalation)	

The thing I'm afraid I'll find out:

Worksheet 4 — High-Return Activities and the Stop List

Day 1, Module 1.4

Calendar audit, last four weeks:

CATEGORY	HOURS	% OF TOTAL
Coaching and development		
Deal / account strategy		
Obstacle removal		
Everything else		
Total		

My high-return activities — where my personal involvement changes the outcome. Three to five maximum. For each, the test is: *what would have happened if I hadn't been there?*

#	ACTIVITY	WHAT CHANGES BECAUSE IT'S ME	HOURS/WEEK NEEDED
1			
2			
3			
4			
5			

My stop list — this must be non-empty, and the hours must be greater than or equal to the hours above.

#	WHAT I'M STOPPING	WHO I NEED TO TELL	HOURS FREED
1			
2			
3			
4			

What will make me abandon this within three weeks:

Worksheet 5 — Environment Audit

Day 2, Module 2.1

If I asked my team "what would have to be true here for this to be the best job you've had?" — what would the top ten be, in their order?

#	WHAT THEY'D SAY	HOW DO I KNOW? (TOLD ME / OBSERVED / INFERRED)
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

How many were inferred rather than evidenced? _____ / 10

Confidence that my top three are actually their top three (0–10): _____

The conversation I'm scheduling:

FIELD	ANSWER
Date	
Who's in the room	
My opening question, word for word	
What I'll do with the list within two weeks	

What I'm afraid they'll say — and what I'll do if they say it:

Worksheet 6 — Shared Expectations Grid

Day 2, Module 2.2

Choose one person on your team. Be specific — "ownership" is a word, not an expectation.

Items in box 1 that do not appear in box 2 — this is the gap:

What this gap has already cost:

Compare box 2 to your sealed pre-work sentence. What changed?

The conversation: Who _____ When _____ Opening line _____

Worksheet 7 — The Cost Ledger

Day 2, Module 2.3

The situation I have been avoiding (initials only):

First, the honest diagnostic:

QUESTION	ANSWER
Have I clearly stated what I expect, out loud, specifically?	Y / N
Have I given real, timely, specific feedback?	Y / N
Have I genuinely coached this — not just mentioned it?	Y / N
Has the environment or role changed in a way that explains it?	Y / N
If I answered N to any of the above, that is my next step, not theirs.	

The cost so far:

COST AREA	WHAT IT HAS COST	ESTIMATE
My time		hrs/week
Work redistributed to others		who, how much
Effect on peers / the standard		
Effect on customers		
Effect on this person's career		
Elapsed time since I first knew		months

What am I actually protecting by not acting?

What have I genuinely tried, and when?

The smallest honest next step (for most people this is a conversation or a call to an HRBP — not a termination):

FIELD	ANSWER
Next step	
Date	
Who I need to involve (HRBP, my manager)	

Worksheet 8 — Change Positioning Canvas

Day 2, Module 2.4

The change:

Is now the right time? What else is this team absorbing?

PERSON	HOW THIS AFFECTS THEM, IN THEIR WORDS (INCLUDING THE BAD PARTS)	TRUST BALANCE 0-10	HEARS IT WHEN, AND HOW

Anyone below 5 needs a conversation before the announcement. Who:

Who helps shape this before it's final (include at least one skeptic):

Where does this break? (partner's answer):

My opening sentence at the announcement — what changes for them comes first:

Worksheet 9 — Listening Observation Sheet

Day 3, Module 3.1 — observer use

MEASURE	ROUND 1	ROUND 2	ROUND 3
Questions asked by listener			
Suggestions offered (should be 0)			
Longest silence held (seconds)			
Times listener interrupted			
Approx. talk ratio (listener : speaker)			

The moment the speaker said something they clearly hadn't articulated before — what preceded it?

One thing the listener should change:

Worksheet 10 — Versatility Plan

Day 3, Module 3.2

Where I sit:

Responsiveness: Low 1 — 2 — 3 — 4 — 5 High Assertiveness: Low 1 — 2 — 3 — 4 — 5 High

My pattern: Amiable / Expressive / Analytical / Driver

My team:

NAME	PATTERN	EVIDENCE (AN OBSERVED BEHAVIOR, NOT A FEELING)

My diagonal — the person who wants the opposite of what I want:

The last friction with that person. What it was about on the surface:

What it may actually have been about:

A message I need to deliver in the next two weeks:

VERSION	TEXT
As I would naturally write it	
Adapted for them	

The smallest adaptation that would make the biggest difference:

Worksheet 11 — Language Practices

Day 3, Module 3.3

Rate your team 0–10 on each practice.

PRACTICE	SCORE	WHAT IT LOOKS LIKE WHEN IT'S ABSENT
Background conversations get surfaced		Parking-lot meetings; the real view never said in the room
Dialogue, not just discussion		Everything is a debate to be won
Alignment before agreement		Slipping deadlines; soft execution
"What's missing?" not "who's wrong?"		Defensive loss reviews; blame
And/also, not either/or		Energy spent collapsing a real paradox

The practice with the most upside for my team:

The specific meeting or conversation where I'll introduce it:

FIELD	ANSWER
Meeting	
Date	
My opening line, word for word	

My team's background conversation — do I know what it is? Y / N

The honest answer I'm most afraid of hearing, and what I'll do if I hear it:

Worksheet 12 — Vision to Reality

Day 3, Module 3.4

My team's vision — three sentences maximum.

- 1 What will be true in 18 months that isn't true now:
- 2 Why that matters to a customer:
- 3 Why that matters to the person doing the work:

The two tests:

Would a member of my team repeat this without laughing? Y / N What does this change about someone's Tuesday?

Goals:

#	GOAL	OWNER	DATE
1			
2			
3			

Building it with them, not presenting it to them:

FIELD	ANSWER
Who helps shape it	
When	
The question I open with	

Worksheet 13 — Coaching Conversation Planner

Day 4, Module 4.2 — also used in the Round 3 practice lab

FIELD	ANSWER
Person (initials)	
The single issue — observable, specific	
What I want to achieve	
What a good outcome looks like for them	

My opening statement, word for word. Must be specific, single-issue, and forward-pointing:

Three questions for the Understand step. Broad, genuinely open, no predetermined destination:

1. 2. 3.

What response might I get? What if they get defensive?

What am I assuming about the cause that I might be wrong about?

Follow-up: What _____ When _____

Conversation scheduled for:

Worksheet 14 — CUS Observation Sheet

Day 4, Module 4.4 — observer use, one per round

MEASURE	OBSERVATION
Minutes in CONFRONT	
Minutes in UNDERSTAND	
Minutes in STRATEGIZE	
Coach talk time (approx. %) — target 20%	
Questions asked	
Statements / suggestions made	
Longest silence the coach allowed (sec)	
More than one issue raised?	Y / N
Who produced the solution?	Coach / Coachee

The moment the coachee said something the coach didn't expect:

Did the coach follow it, or return to their agenda?

One thing for the next round:

Worksheet 15 — Credibility and Mindset

Day 4, Module 4.5

Score yourself as your team would score you, 0–10:

CHARACTERISTIC	SCORE	EVIDENCE THEY'D POINT TO
Honest		
Forward-looking		
Inspiring		
Competent		

My lowest. Two specific actions:

1. 2.

Where have I spent credibility without noticing?

Mindset — mark where you actually sit on each row:

SAFETY	1 — 2 — 3 — 4 — 5	DISCOVERY
Fights change		Uses change
Holds onto what worked		Reaches for what's next
Controls others		Trusts and learns from others
Either / or		And / also
Independent		Interdependent
Plays not to lose		Plays to win

The row where the gap costs me most:

The one weekly commitment I could keep for a year:

Worksheet 16 — 90-Day Leadership Charter

Day 4, Module 4.6

Name: _____ Date: _____

1. The one sentence. The kind of leader I am choosing to be — written so that someone on my team would recognize it as true if I lived it.

2. Three behaviors I am changing. Observable. Someone else could tell whether I did it.

#	BEHAVIOR	WHO NOTICES FIRST	STARTING WHEN
1			
2			
3			

3. My stop list. What comes off the calendar to make room.

#	STOPPING	TOLD WHO	BY WHEN
1			
2			

4. My first coaching conversation. Within ten days.

Person _____ Issue _____ Date _____

5. My weekly commitment. One thing, every week, for 90 days, without fail.

6. Accountability.

FIELD	ANSWER
Sending this charter to	
By when	
Sharing with my own manager on	
30-day check-in partner	
30 / 60 / 90 self-review blocks booked	Y / N

Signed: _____

Appendix B — Coaching Scenario Cards

Day 4, Practice Lab. Print one set per triad, cut into cards. The coachee reads their own card only. The coach receives the first paragraph only; the hidden context is never shown to the coach.

Facilitator: swap product names, segments, and titles to match your cohort's business before printing.

CARD 1 — THE DISCOVERY SKIP

For the coach: Jordan is a solid AE, two years in the seat. On last Thursday's first call with a new prospect, Jordan moved to a product demo about four minutes in, before establishing the customer's decision process or success criteria. You listened to the recording.

Hidden context (coachee only): The champion mentioned at the start of the call that a competitor was demoing the following Tuesday. You panicked about being second and went straight to the product. You know it was the wrong call. You have not told anyone because it feels like admitting you got rattled. You will disclose this only if the coach genuinely asks and gives you room — not if they lecture or jump to advice.

CARD 2 — THE LATE FORECAST

For the coach: Sam has submitted the weekly forecast late four of the last six weeks, usually by a day. The forecast rolls up regionally, and your own submission has been late twice as a result.

Hidden context (coachee only): You have been late because you have started actually verifying with customers before committing deals, which takes an extra day and which nobody asked you to do. Your accuracy is now the best on the team, and you assumed someone would notice. Nobody has. You are slightly resentful about it, though you will not say so unprompted.

CARD 3 — THE QUIET CSM

For the coach: Alex is a capable CSM who has become noticeably quiet in team meetings over the last two months — used to contribute regularly, now says almost nothing. Individual account work is unaffected.

Hidden context (coachee only): Two months ago you raised a concern about a renewal process change in a team meeting and the manager responded in a way you experienced as dismissive — not hostile, just fast and slightly impatient, and then moved on. You decided it was not worth it. You do not remember this as a big event and will not raise it unless asked something quite open, like "what changed two months ago?"

CARD 4 — THE OVERCOMMITTED STAR

For the coach: Riley is your top performer and has taken on three side initiatives this quarter — a mentoring program, a competitive-intel workstream, and an onboarding redesign — on top of a full patch. In the last three weeks, two customer follow-ups have slipped.

Hidden context (coachee only): You took the side projects on because you want to move into leadership and nobody has ever told you what the path looks like. You are quietly afraid that if you say no to anything, you will be seen as not leadership material. You will admit this only if the conversation gets to what you actually want.

CARD 5 — THE DEFENSIVE RESPONSE

For the coach: Morgan's deal notes have been thin for two months — close plans missing, next steps vague. Two deals slipped last quarter with no early warning that would have been visible from the notes.

Hidden context (coachee only): You are defensive about this and you will show it in the first two minutes. Your position: you are hitting your number, the CRM is administrative theater, and you have watched managers use notes to second-guess reps. **However** — if the coach stays specific, does not moralize, does not stack a second issue on, and asks what would make the notes actually useful to you, you will soften and engage genuinely by around minute six. If they lecture or pile on, you stay closed for the whole conversation.

CARD 6 — THE PRESENTING ISSUE ISN'T THE ISSUE

For the coach: Casey has missed two of the last three one-on-ones with you, rescheduling at short notice both times.

Hidden context (coachee only): You have been interviewing elsewhere. The real reason is that you were passed over for a segment move six months ago and were never told why. You are not going to volunteer any of this. If the coach spends the conversation on calendar management and rescheduling etiquette, you will apologize, agree to do better, and disclose nothing. If they ask something genuinely open about how things are going for you overall and then actually wait, you will say something like "honestly, I've been thinking about whether this is the right seat for me" — and see what they do with it.

CARD 7 — THE PEER CONFLICT

For the coach: Two of your reps, Devi and Nico, are in escalating conflict over account boundaries in a shared vertical. It has surfaced twice in team meetings. You are coaching Devi.

Hidden context (coachee only): You believe Nico has twice contacted accounts that are yours under the rules. You are right about one of the two. You have not spoken to Nico directly about either, because you assumed the manager would handle it. You want the manager to rule in your favor, and you will push for that. You have not considered talking to Nico yourself.

CARD 8 — THE PLATEAU

For the coach: Taylor has hit exactly 100–104% of quota for six consecutive quarters. Never misses. Never exceeds meaningfully. Capable of more by any assessment.

Hidden context (coachee only): You are deliberately managing to just over quota. Two years ago you had an outlier year at 168% and your territory was cut and your quota raised the following year. You concluded that overperformance is punished. You will not say this directly unless the coach creates real safety — and if they open by celebrating your consistency, you will simply agree and give them nothing.

Appendix C — Facilitator Quick Reference

Materials checklist

ITEM	QUANTITY
Participant workbooks (Worksheets 1–16)	1 per participant
Scenario cards, cut	1 set per triad
Commitment cards, Day 1	2 per participant
Flipcharts	4 minimum
Markers	4 per table
Timer visible to the room	1
Sticky notes	1 pad per table

Models on the flipchart

Draw these live. Do not put them on slides pre-drawn — the drawing is part of the teaching.

- The triangle, point up, then inverted (Day 1)
- The traditional management model, left to right (Day 4)
- The engagement ladder, bottom to top (Day 4)
- CUS, three steps with the 10/70/20 split (Day 4)

Timing recovery

If you are running behind, cut in this order:

- 1 Full-room report-outs — go table-level instead
- 2 Module 3.2 style exercise — teach the model, cut the rewrite
- 3 Module 1.3 Listening Post exercise — make it homework
- 4 Day 3 vision module — compress to 45 minutes

Never cut: the Day 4 practice lab, the charter, or the calendar-booking step. If you have to choose between finishing the content and finishing the charter, finish the charter.

The four things to watch for in the practice lab

- 1 Advice at ninety seconds
- 2 More than one issue in the confront
- 3 The coach filling their own silence
- 4 Interrogation — questions with a predetermined destination

Communications

WHEN	WHAT	TEMPLATE
10 days before Day 1	Pre-work email to participants	Appendix D1
3 days before Day 1	Two-sentence reminder	Appendix D1 notes
Within 5 days of Day 4	Reinforcement note to each participant's manager	Appendix D2
Day 30	Charter photo back to participant, one question	After the Program
Day 45	Virtual cohort reconvene	After the Program

Source note

This program's structure draws on well-established leadership development thinking, including the research of Kouzes and Posner on the practices and characteristics of admired leaders, Covey on seek-first-to-understand, and the broader literature on servant and supportive leadership. All scenarios, stories, characters, exercises, and worksheets in this guide are original and fictional. Any resemblance to actual UKG employees or customers is coincidental.

Appendix D — Communications Templates

Two emails carry most of the transfer weight in this program. The first determines whether participants arrive able to work on their own situations. The second determines whether anything survives contact with their next quarter.

Replace the bracketed fields before sending. Keep both in plain text — no banners, no branded headers, no attachments where a paragraph will do. These read as notes from a person, and they should.

D1 — Pre-Work Email

Send: 10 days before Day 1\

From: the facilitator, not a shared enablement alias\

To: participants\

Subject: Earned — four things to bring, [Month DD]

[First name],

You're confirmed for Earned on [dates] at [location], 8:30 to 4:30 each day. Before you come, there are four things to bring. They should take about 45 minutes total, and the program works in direct proportion to how honestly you do them.

1. Three names. Someone on your team who is thriving. Someone who is stuck. And someone you've been avoiding a hard conversation with. First names or initials only — you will never be asked to say them out loud.

2. Your calendar for the last four weeks. Printed, or on a device you can look at. You'll be analyzing where your time actually went, so don't tidy it up first.

3. One sentence, written before you arrive. Answer this: *If my team were asked what I expect of them, what would they say?* Write it, seal it, and don't revise it. You'll open it on Day 2 and compare it to something.

4. One decision you've been sitting on for more than 30 days.

Nobody collects any of this. It isn't shared with your manager and it isn't assessed. It exists so that you spend four days working on your actual team rather than on hypotheticals.

Two practical notes. This is four full days in the room — no laptops during practice sessions, so please set expectations with your team and get coverage arranged now rather than the night before. And come prepared to talk about things that haven't gone well; the most useful person in the room is usually the one willing to describe what they got wrong.

If anything about the pre-work isn't clear, reply to this and I'll answer directly.

See you on the [day].

[Facilitator name] \ [Title]

FACILITATOR NOTES ON D1

- **Send it from a person.** Pre-work sent from a shared alias gets completion rates roughly half those of pre-work sent from the named facilitator.
- **Do not attach a workbook.** Adding a PDF converts this from four small asks into a homework assignment, and completion drops.
- **Send one reminder**, three days out, no more than two sentences: *"Quick reminder on the four things for Earned next week — particularly the sealed sentence, which is the one people forget and the one we use on Day 2."*
- **If a participant's manager pushes back on four days out of the field**, that conversation is the facilitator's to have, not the participant's. Offer the manager the D2 note early so they can see what they get out of it.

D2 — Manager Reinforcement Note

Send: within five business days of Day 4\

From: the facilitator\

To: each participant's direct manager, individually — not as a group send\

Subject: [Participant first name]'s commitments from Earned — one 20-minute ask

[Manager first name],

[Participant] finished Earned last week. The ask here is small and specific: **have one 20-minute conversation with them in the next two weeks about what they committed to.** Nothing to prepare, nothing to submit. That conversation is the single largest variable in whether any of this survives the quarter, and it matters more than anything we did in the room.

What they worked on. Four days on the shift from producing results personally to producing them through their team — how their leadership orientation shows up under pressure, what conditions their team actually needs, how to listen well enough to learn something, and how to run a structured coaching conversation. The last of those got a full day and ninety minutes of live practice.

What they left with. A written 90-day charter containing six things: one sentence on the kind of leader they're choosing to be, three specific behaviors they're changing, a stop list of what comes off their calendar to make room, a first coaching conversation scheduled within ten days, one commitment they'll keep every week for 90 days, and the name of the person holding them accountable.

They have the charter. I'd suggest asking them to bring it and walk you through it rather than sending it to you in advance — reading it aloud to their manager is most of the value.

Three questions that work better than "how was the training":

- Which of your three behaviors is actually happening, and which one hasn't started?
- What came off your calendar to make room? (The stop list is where these plans usually fail. Almost everyone adds; almost nobody subtracts.)
- Who was your first coaching conversation with, and what surprised you?

Two things that would help more than encouragement. First, if their stop list includes a meeting you run or a report you asked for, consider letting it go — a stop list their manager overrides is a stop list that dies in week two. Second, ask about the first coaching conversation specifically. Most people find their first one awkward and conclude they're bad at it. They're not; everyone's first one is awkward. Knowing you expect a second one is usually enough.

What not to do: don't turn this into a performance conversation, and don't ask to see the charter as a deliverable. Several of the commitments involve people or situations they're being candid about, and candor is the thing that makes the plan real.

I'll follow up with [participant] at 30 days and again at the cohort reconvene on [date]. If you'd like to know what the program actually covered, or you want a version of these questions for your own team, just reply.

[Facilitator name] \ [Title]

FACILITATOR NOTES ON D2

- **Send individually.** A group send to twenty managers reads as a program announcement and gets treated like one. Twenty separate emails with the participant's name in the subject line get opened.
- **Never include content from the participant's charter or worksheets.** Participants were told in the room that nothing they wrote would be shared, and the entire program depends on that being true. The note describes the *structure* of what they committed to, never the substance.
- **The stop-list paragraph is the highest-yield sentence in this email.** Managers who quietly reverse a direct report's stop list are the most common single cause of these plans failing, and almost none of them realize they're doing it.
- **If a manager replies asking to attend a future cohort,** that is the best available signal that the program is working. Track those replies.
- **Optional pre-program variant.** If your cohort's managers haven't seen this program before, send a three-sentence version of D2 a week *before* Day 1: what their leader will be working on, that they'll come back with a 90-day charter, and that a 20-minute conversation will be asked of them afterward. Managers who know the ask is coming honor it at a noticeably higher rate.