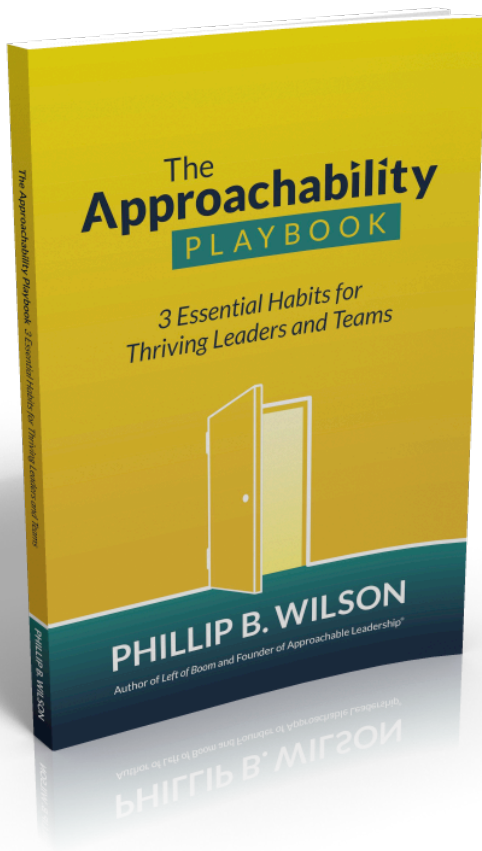# The Approachability
PLAYBOOK

Approachable Leadership®
SURVIVAL TOOLKIT

Enclosed are ready-to-use templates of the 6 tools found in *The Approachability Playbook* plus 4 bonus tools (including our "one-on-one" agenda and our "3 questions" guide). Use the guide on page 2 to decide which tool to use based on your situation.

We hope you enjoy these tools. Please let us how you are using the tools and any success stories or suggestions for improvement.

Thank you!

WHICH TOOL SHOULD I USE?

WHAT CHALLENGE DO I FACE?	Shrinking Power Distance Gaps	Three Questions Tool	One-on-One Agenda	Approachability Window Tool	Right Space Tool	Active Listening Tool	Follow Up / Follow Through Tool	SLC+C Tool	Walk a Mile Tool	Recognize Approachability Tool	Gripes Are Good Tool	Win, Know, Show Progress Tool
"I'm not sure my team trusts me or feels safe coming to me."	✓			✓				✓	✓		✓	
"I could work on my 'curb appeal' as a leader."	✓				✓					✓		
"Sometimes I get busy and things slip through the cracks."			✓				✓					✓
"My communication skills could use a little work."		✓		✓		✓		✓			✓	
"I sometimes have trouble connecting with others."				✓		✓		✓	✓			
"I'm not always sure what to say when I meet with my team."		✓	✓								✓	✓
"I need help growing and motivating my team."		✓	✓				✓					✓

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Shrinking Power Distance Gaps

Power distance gaps cause major problems. Setting the stage and following this four-step process will help you recognize and shrink power distance gaps.

Tool in Brief

- **Set the Stage** subtle changes that impact how you are perceived
- **Notice Gaps** look for signs of the three types of gaps
- **Name the Behavior** discussing it with the person begins to bridge the gap
- **Empathize** share from your experience; makes you more relatable
- **Create Partnership** asking for advice disarms the tension; levels the playing field

TOOL IN PRACTICE

Use the tool to recognize signals of power distance. When you notice one, follow the steps to help shrink the gap. Start by setting the stage.

Step One: Notice for gaps

- Physical Gaps
- Behavioral Gaps
- Verbal Gaps

Step Two : Name the behavior

- Fidgeting?
- Not making eye contact?
- Never offers constructive or negative feedback?

Step Three: Empathize

- An experience with a boss you've had
- An avoidance behavior you've engaged in
- How you felt

Step Four: Create Partnership

- Use a Discussion Starter
- Ask for advice

Set The Stage

- Physical Space
- Face & Hands
- Courtesy
- Availability

Approachable Leadership®

Shrinking Power Distance Gaps

Here are some details to help with setting the stage, identifying gaps and opening up a discussion aimed at shrinking gaps.

DETAILS

Set the stage – pick several to get started, and keep working

- Open and inviting office/work space
- Face the door
- Focus attention during conversations
- Smile (with your eyes!)
- Shake hands, high fives, fist bumps

- Walk around frequently – be available
- Use hello, please, and thank you
- Call teammates by name
- Ask teammates the 3 Questions often
- Open stance (not arms crossed)

Types of gaps to look for

Physical Gaps

- Physical distance, turned toward an "exit"
- Avoiding eye contact, looking at ceiling
- Closed body language (arms crossed)
- Distracted, seems lost in thought
- Holding back or agitated body language

Behavioral Gaps

- Promising one thing, doing another
- No follow through or follow up
- Passive aggressive actions
- Being "too busy" or procrastinating
- "Changing mind" about importance of issue

Verbal Gaps… These are the most recognizable signals of power distance

- Watch for mitigated speech like **hints** ("I wonder if…"); **preference** ("perhaps we should…"); **question** ("do you think ___ would work?"); or **team suggestion** ("why don't we try ___?")
- Look for attempts to "sugarcoat" or downplay bad news
- Being overly polite or deferential
- Quickly deferring, backing down when rejected by someone in power

Discussion Starters… use these (or something similar) to help name the behavior, empathize, and create partnership, leading to asking for advice

"You seem uncomfortable. It's OK – I really want to know what you think."

"I'm not 100% sure what I think about this myself. Tell me what you really think."

"OK, that's what I do [name behavior] when I'm not sure if I should say something. What's up?"

"I need your help. Can you be honest and tell me exactly what you think about this?"

"I may be completely off base here, I don't know. Can you tell me what you really think?"

Approachable Leadership®

The 3 Questions Tool

During the Workshop we learn the 3 Questions of Approachable Leaders. Those are a starting point. This tool helps you adapt the 3 Questions to <u>your</u> workplace.

CHECKING IN

The Three Questions (and their assumptions)

Do you have what you need? — *Nobody wakes up hoping to do a crappy job.*

What would make work better? — *My job as a leader is to reduce friction.*

Where are you going? — *People want to make progress.*

TOOL IN PRACTICE

Do you have what you need?
Other ways to ask:
- ❑ Anything I can do for you?
- ❑ You need anything?
- ❑ Everything good?
- ❑ You're crushing it today!
- ❑ How am I doing?

This is the resource question. Can you ask it in a way that is suitable to your workplace?
How else can <u>you</u> ask?

_____

_____

_____

What would make work better?
Other ways to ask:
- ❑ Anything in your way?
- ❑ What's your best new idea?
- ❑ Can you think of a better way?
- ❑ What would you change?
- ❑ Anything new?

This is the innovation question. Can you ask it in a way that is suitable to your workplace?
How else can <u>you</u> ask?

_____

_____

_____

Where are you going?
Other ways to ask:
- ❑ You learning anything new?
- ❑ What's your next move?
- ❑ Applying for a promotion?
- ❑ What are you proud of?
- ❑ Any new "highlight reel" work?

This is the progress question. Can you ask it in a way that is suitable to your workplace?
How else can <u>you</u> ask?

_____

_____

_____

Approachable Leadership®

One on One Guide

One on One Agenda

Name: _____

Today's Date: _____

Period: _____

CHECKING IN

How are you doing?

I'm great! Doing good Could be better Not good

How are you doing since we last talked?

What went well?

_____

_____

Any challenges?

_____

_____

WHERE ARE WE GOING?

Your Needs

What do you need?

_____

_____

What would make work better?

_____

_____

Where are you going?

_____

_____

How Can I Help?

What do you need from me?

_____

_____

How can I make work better?

_____

_____

How can I help you get where you're going?

_____

_____

What do you want to work on over the next 30 days?

_____

_____

Approachable Leadership®

Approachability Window Tool

Many are slow to trust people in power. This creates a "power distance gap." Approachable leaders use the *Approachability Window Tool* to shrink the gap.

Tool in Brief
Approachability Window

The goal of this tool is to improve relationships by revealing more about yourself and seeking feedback. When you don't seek feedback you create blind spots. When you don't share with others, you close them out. This may cause them to withdraw.

Approachability Window

Ask for feedback ▶

Blind

Share with others ▼

Hidden
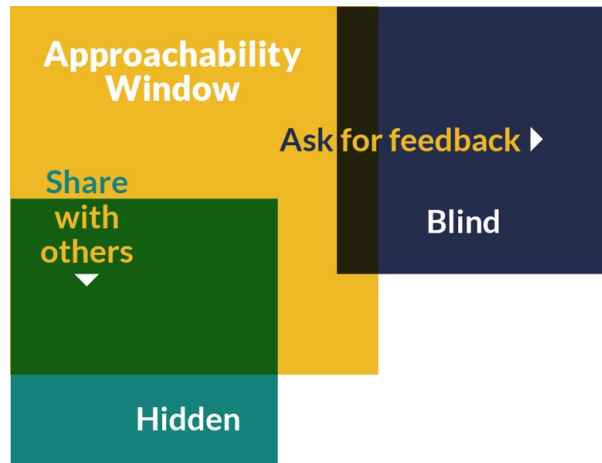
TOOL IN PRACTICE

Tips to Encourage Feedback

1. **Encourage feedback**. Sincerely ask for input.
2. **Stop/Start**. What should I start doing? What should I stop doing?
3. **Stress the value of the feedback.** Why is it important? Why is this person uniquely able to provide it?
4. **LISTEN!** Use our *Active Listening Tool* to make sure you do a good job of listening. This by itself encourages feedback.
5. **Don't be defensive!** Accept the feedback, be open-minded and reflect on it. <u>Thank them – it's a gift!</u>

Tips to Grow Relationships

1. **Take your time** – sharing too much too soon can be worse than not sharing. Go slow.
2. **Ask questions**. Don't interrogate but show interest and learn as much as you can.
3. When you share with someone **mention the relationship** – "I don't tell everyone this, but we are close so I'll tell you…"
4. **Be empathetic** (don't one-up, offer unsolicited advice, etc.) Use our *Empathy Toolkit.*
5. **Don't share secrets**.
6. **Acknowledge and appreciate** if they reveal something new.

Approachable Leadership®

Right Space Tool

The first cornerstone of Approachable Leadership® is to be welcoming and create the right space. This tool provides practical tips on how to be available, warm and present.

CHECKING IN

Right Space is created by:
- Physical Space
- Availability
- Warmth
- Presence

The Connection Model

low connection

Be Open right space

Understand right feeling

Support right action

HIGH CONNECTION
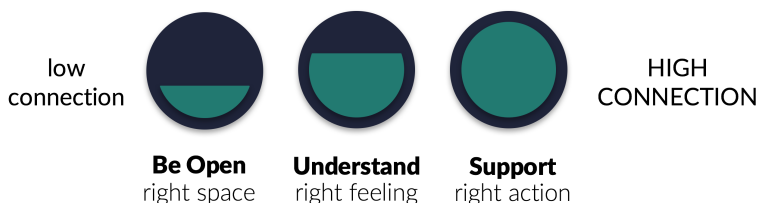
TOOL IN PRACTICE

Use the tool to identify opportunities to improve your physical space, your behavior, your availability and your presence.

Physical Space
- •Is the physical space inviting and warm?
- •Comfortable place to sit?
- •No obstacles between (same side of desk)?
- •Personal objects or discussion starters?
- •Is it quiet? Can it be private?
- •Is there a reason to visit? Food works great - so do games.

Availability
- •Available to meet when needed?
- •Do you block scheduled "drop in" time?
- •Convenient way to schedule time on your calendar?
- •Do you allow interruptions for emergency situations?
- •Do you "advertise" ways to meet with you?

Warmth
- •Are you welcoming and neighborly?
- •Are you smiling? Remember you smile with your eyes.
- •Have you asked open-ended questions?
- •Are you doing more than half the talking? Shut up.
- •How are they feeling? Are they comfortable?
- •What do they need?

Presence
- •Full stop. Give full attention.
- •Put away your phone, close your laptop. No distractions.
- •Close your door or signal to others that you are in a meeting.
- •Listen actively. Don't try to think of what you'll say next.
- •Summarize what you've heard and confirm understanding.
- •No problem solving till asked.

Approachable Leadership®
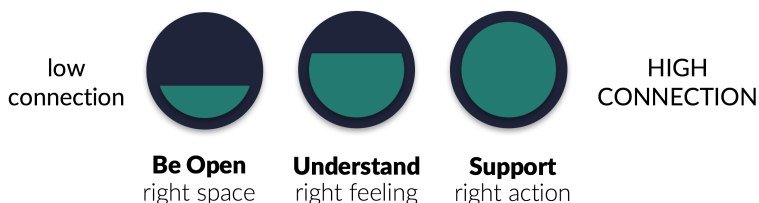
Active Listening Tool

A cornerstone habit of Approachable Leadership® is active listening. Without this skill there is no way to achieve understanding. This tool provides practical tips on how to improve your active listening skills.

Active Listening:
- Pay Attention
- Listening Behavior
- Feedback
- No Judgment
- Respond

The Connection Model

low connection

Be Open
right space

Understand
right feeling

Support
right action

HIGH CONNECTION

TOOL IN PRACTICE

Use the tool to identify opportunities to improve your active listening skills.

Pay Attention

(eye contact, not thinking about your response)

Show the speaker you are listening

(nonverbal, encourage, build, clarify, validate)

Active Listening Phrases

Can you tell me more?
What does that look like?
I thought I heard you say… right?
You seem [emotion] about this…
What I hear you saying is…
Have you considered…
When you talk about this I noticed [behavior]…
You've obviously put a lot of effort into this…
Let me make sure I understand you….
Please tell me more about that…
That sounds like a great story, tell me more…
Is there anything else?

Respond appropriately

(restate, validate, reflect)

Provide feedback

(restate, reflect, summarize)

Don't judge

(encourage, validate)

Approachable Leadership®

Empathy SLC+C Tool

Empathy is hard. Leaders often feel like they need to have all the answers or they'll be seen as weak. Use this tool to help build your empathy skills and grow relationships.

Tool in Brief Empathy is the opposite of sympathy. Here is how to express it:

Stop → **Listen** → **Confirm** → **+Collaborate**

Use the tool to use the Stop, Listen, Confirm, + Collaborate model.

Stop. Give your attention, full stop.
- Put away your phone, close your laptop
- Remove any distractions
- If you can't pay attention reschedule
- Block uninterrupted time to meet
- Close your door – ask for privacy

Listen. Use active listening skills.
- Show speaker you are listening
- Provide feedback (summarize, reflect)
- No judgment, encourage more
- Respond appropriately (validate, restate)
- Focus on them – not what you will say next

Confirm. Make sure you understand the situation and the feeling.
- "You feel _____ because of _____. Do I have that right?"
- Give them space to correct your interpretation
- Remain in Gestalt mindset – don't give answers or advice
- Sit with that feeling you just described, think about a time you felt the same way
- Make sure you have confirmed understanding before moving to the next step

Collaborate. If you are asked, use solution-focused questions to find an answer.

Avoid problem-focused questions.
1. What's wrong?
2. Why do you have this problem?
3. Whose fault is it?
4. How long has this been going on?
5. What is this costing you?
6. Why haven't you overcome this problem?

Ask solution-focused ones instead.
1. What result do we really want?
2. When can we start?
3. What do we need to get started?
4. What resources are available?
5. Who can help?
6. What can we start now?

Approachable Leadership®

Follow-Up Follow-Through Tool

The essential habit of support happens with good follow up and follow through. Lack of follow through destroys trust and credibility. Here are some practical tips to improve your follow up and follow through.

Follow-Up and Follow-Through:
Rules
Tools
Habits
Environment

The Connection Model

low connection

Be Open
right space

Understand
right feeling

Support
right action

HIGH CONNECTION

These are the 6 Key Areas for Follow Up and Follow Through.

- Supportive Environment, Tools
- Accountability Partner
- Make It Routine, Identity
- **Follow Up Follow Through**
- Start, Build Momentum
- Schedule It
- Simple, Concrete Rules

Learn numerous other follow-up and follow-through ideas in *The Approachability Playbook* (ALplaybook.com)

Follow-Up Rules to Experiment with:

- Clean up your workspace each day before you leave.
- List your top three to-do items before you leave.
- Empty your in-boxes (physical and virtual) each day and add follow-up items to your to-do list.
- Limit your in-boxes (one physical and one virtual in-box).
- Don't turn on your computer or tablet until you have taken a walk through the work area.
- Only check email at certain times each day.
- Arrive 30 minutes before your team to prepare for day.
- Make follow-up an agenda item for all meetings.
- Follow through on one to-do item before you wake up your computer each time you sit at your desk.
- Add follow-up to your morning or evening routine.

Supportive Environment Tools to Experiment with:

- Use an obvious, physical in-box where people know they can put items they want you to see.
- Use an "Always Around" in-box where you can capture follow-up items (a notebook, notecards, or a phone app are the most common).
- Use a "dictation" app so to-do items can be captured by voice (Siri® can add items to your reminders list or a document by just speaking them into your phone).
- Consider using a "location-aware" to-do app, that can remind you to take an action when you are in a certain location (like picking up a form when you are at the corporate office).
- Use a whiteboard to put your key to-do items, follow-up items, or issue-tracking system.
- Share an Excel® spreadsheet with your team so they can see progress on open items and when items close.

Approachable Leadership®

"Walk a Mile" Tool

People often behave differently than we expect. Our unconscious biases attempt to explain behavior we don't understand in our own terms, and we must fight this tendency.

CHECKING IN

Tool in Brief
- **Report** what you observed – FACTS ONLY
- **Walk a Mile** consider different perspectives; "Nobody thinks they are the villain."
- **Confirm** discuss and validate your interpretation with the other person; assume positive intent; "You feel _____ because of _____. Do I have that right?"

TOOL IN PRACTICE

Use the Report/Walk a Mile/Confirm prompts below and complete with as much detail as you can. Use the back side if needed.

Report the Facts: Describe FACTS not motive or feelings; remain neutral and exact

Key Questions
What happened first, second, third?

Who was involved?

Exactly what did you observe?

How did each person behave?

Did anyone else observe what happened?

Walk a Mile: Consider other perspectives; attribute positive motive to those involved.

Key Questions
What different ways explain the behavior?

What assumptions am I making?

What is the best possible reason it happened?

How would I feel if I was in their shoes?

What if this was your wife, child, or parent?

Confirm understanding: Validate feelings; reconcile perspectives; assume positive intent
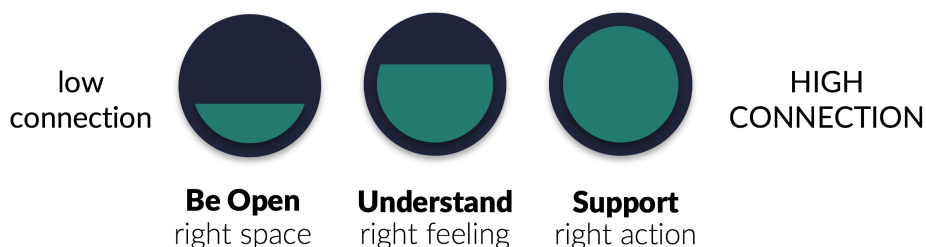
Key Questions
How do I think they are feeling?

Why do I think they feel that way?

Is this the best possible explanation?

Have I confirmed their feelings?

Have I missed anything?

Approachable Leadership®

Recognize Approachability Tool

During the Workshop we practice acting "Just Right" and learn to recognize approachable (and unapproachable) behavior. This tool continues building this skill.

The Connection Model

low connection

Be Open right space   **Understand** right feeling   **Support** right action

HIGH CONNECTION

TOOL IN PRACTICE

Right Space

- ☐ <u>Physical space:</u> Welcoming? Inviting? Open door? Comfortable place to sit?

- ☐ <u>Warmth:</u> Genuinely glad? Appropriate touch? Eye contact? Body language?

- ☐ <u>Availability:</u> Make time to meet? Walk around to others' space? Keep appointments?

- ☐ <u>Present:</u> Limit distractions? Single tasking? Sole focus on the individual?

Right Feeling

- ☐ <u>Stop:</u> Full stop. Eliminate distractions. Reschedule if not able to give complete attention.

- ☐ <u>Listen:</u> Use *Active Listening* Tool. Show you are listening, provide nonjudgmental feedback.

- ☐ <u>Confirm understanding:</u> You feel [emotion] because of [reason]. Do I have that right?

- ☐ <u>Gestalt mindset:</u> Empathy. No advice. Share experience of similar emotion (don't "one-up").

Right Action

- ☐ <u>Solution-focused questions:</u> How do we solve? Who can help? What's our goal?

- ☐ <u>Follow up tool:</u> Use *Right Action* Tool. Inbox always with you. Routinely empty. Schedule.

- ☐ <u>Follow up rule:</u> Touch only once. Do it now. Return calls and emails on schedule.

- ☐ <u>Get help:</u> Accountability partner. Reminder if not back when promised.

Approachable Leadership®

Gripes Are Good Tool

When a complaint surfaces, this is a golden opportunity to reduce frustration for your team. Use the tool to secure advice and buy-in from your team member, and track actions.

What would make work better?

What is your advice?

What small wins can we identify?

What can I do?

Approachable Leadership®

The Win, Know, Show Progress Worksheet

Name: _____ Date:_____

What's Next? What to improve? Why important or meaningful?

Win What's your <u>next small win</u>?

Know What's your "right way/wrong way" <u>yardstick</u>?

Show <u>What</u> will you show, and to <u>whom</u>, <u>when</u> you're ready?

FOLLOWING UP

☐ Copy of completed worksheet given to teammate.

Date of follow-up discussion: _____

Take Action

What's The Next Step On Your Approachable Leadership Journey?

Does your company struggle with change, engagement or turnover?

Approachable Leadership can help.

Here are some useful next steps you can take *today* to help increase "grit" and enthusiasm, improve cooperation and reduce turnover in your company:

Pick up *The Approachability Playbook* for your leaders. *The Approachability Playbook* is a simple, easy-to-read (just over 100 pages) and practical book on the one simple behavior that is transforming leaders around the country. Pick up a copy for each leader on your team today.

Learn more about our Learning System. Like the Survival Kit? We offer a number of ways to introduce Approachable Leadership® to organizations. You can provide a year's worth of powerful leader training at an investment that will make your finance team smile.
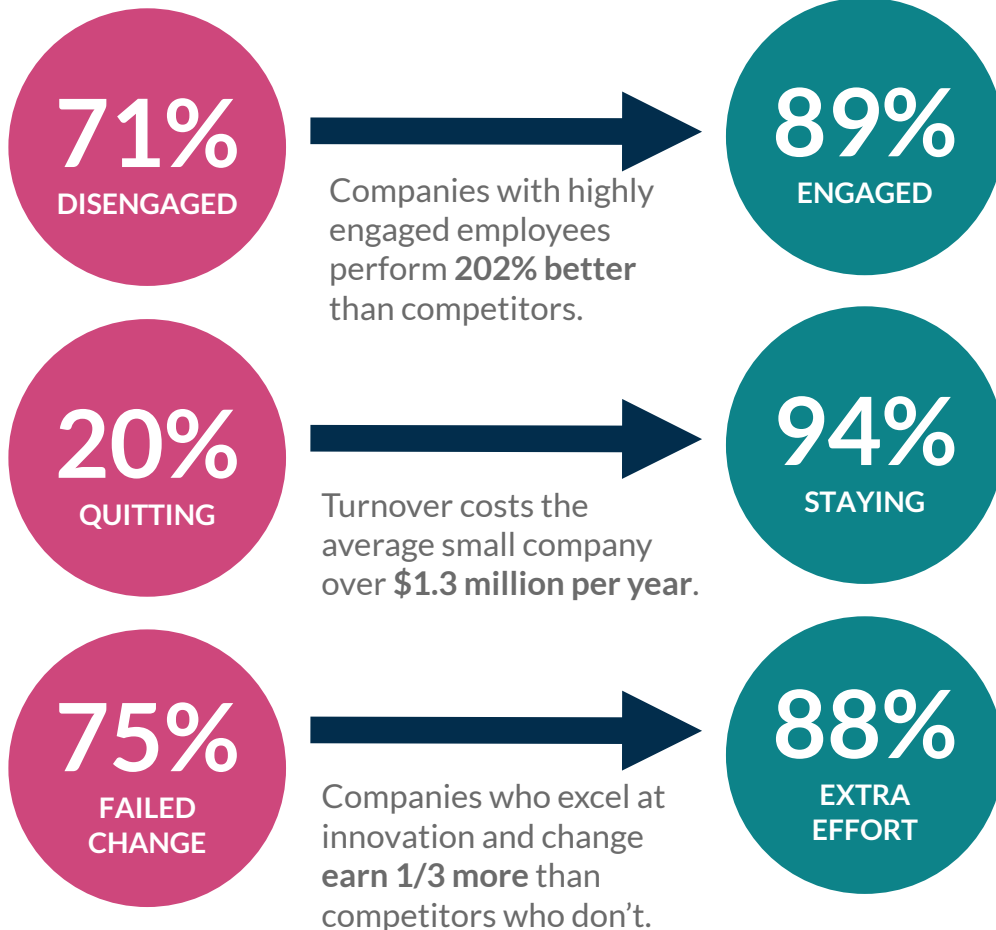
How can Approachable Leadership help your company? Learn more about the design and delivery of Approachable Leadership Workshops and *Learn & Lead Huddles.* Plus get any of your questions answered. A high-value use of time.

Call 800-888-9115 to schedule your FREE Executive Briefing today.

Summing Up Return on Investment

71% DISENGAGED → Companies with highly engaged employees perform **202% better** than competitors. → **89% ENGAGED**

20% QUITTING → Turnover costs the average small company over **$1.3 million per year**. → **94% STAYING**

75% FAILED CHANGE → Companies who excel at innovation and change **earn 1/3 more** than competitors who don't. → **88% EXTRA EFFORT**

The average company loses **_over $7 million per year_** due to the "silent killers." What are they costing _you_?

A small investment in improving first-level leaders offers huge return—and a _much_ better place to work.