2023-2024
PELI Advanced Course
Session 4

March 14 – 16 2024

Thursday, Friday, and Saturday Agenda

Thursday Evening – Sally Ourieff MD

7:30 – 9:00 pm Introduction and Your MBTI Style and Preferences

Friday – Sally Ourieff MD

8:00 – 10:00 am	Emotional Intelligence
10:00 – 10:15 am	Break
10:15 – 12:00 pm	Vertical Development in Leadership
12:00 – 1:30 pm	Lunch
1:30 – 3:30 pm	Difficult Conversations and Communication
3:30 – 3:45 pm	Break
3:45 – 5:30 pm	Immunity to Change

Saturday – Sally Ourieff MD and Coaches

7:30 – 9:30 am	Life Portrait and GELM Feedback Review
9:30 to 9:45 am	Break
9:45 – 11:00 am	Life Portraits and GELM Feedback Review
11:00 am – 11:15 am	Reflections and Take Aways
11:15 am – 11:30 am	Course Assessment

*A Common Language
for Self-Awareness and Relating to Others*

Sally Ourieff MD
March 14, 2024

Leadership is Behavior and How You Think

Leadership Development is both Horizontal AND Vertical
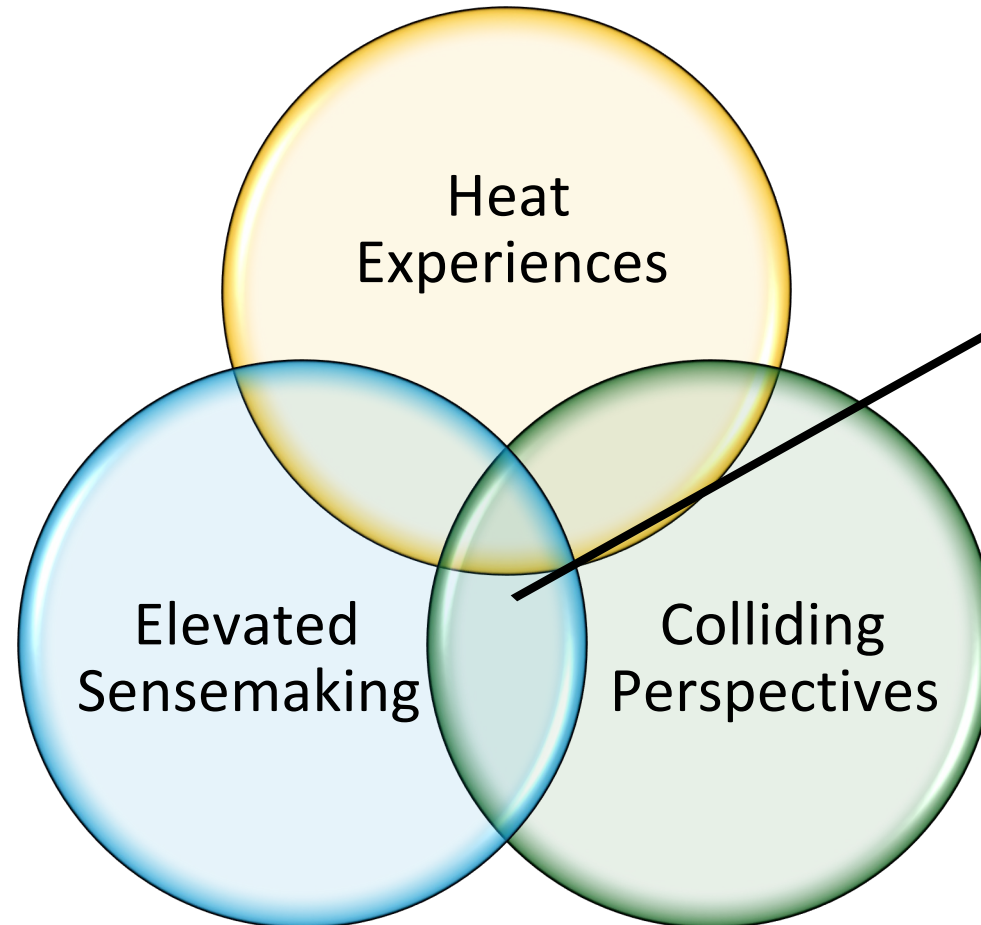
Horizontal Development

- Skills
- Competencies
- Information
- Models
- Frameworks

Vertical Development

- Growing your mindset.
- How you think.
- Integrating more complex, interdependent, systemic mental models.
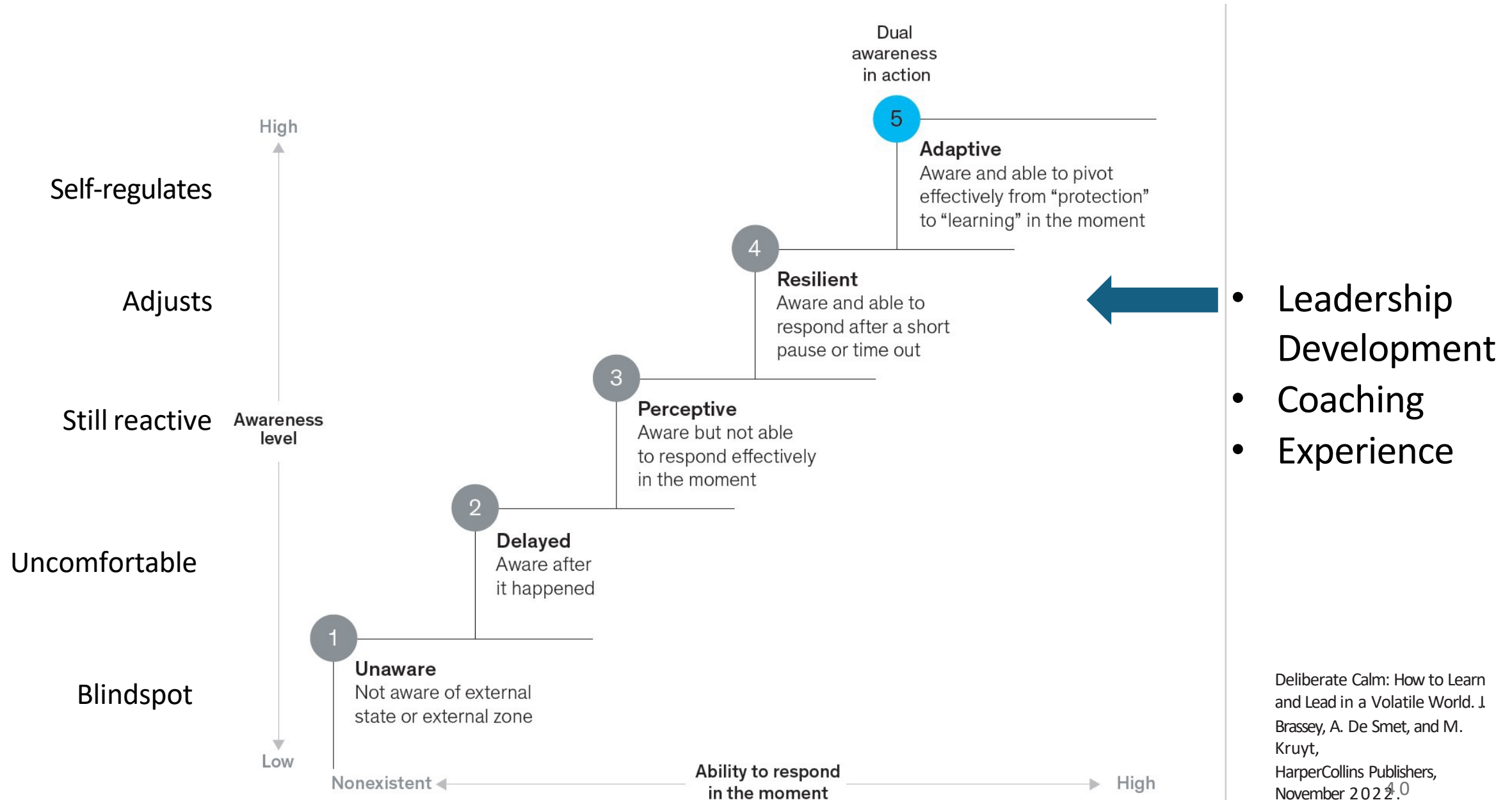- Psychological & emotional growth
- Greater lived experience.

Vertical Leadership Development, N. Petrie. CCL 2013

How Do You Expand Your Mindset?

©Sally Ourieff MD 2024

Leadership Requires Adaptability and Steadiness

Self-regulates

Adjusts

Still reactive

Uncomfortable

Blindspot

Awareness level

High

Low

Dual awareness in action

5

Adaptive
Aware and able to pivot effectively from "protection" to "learning" in the moment

4

Resilient
Aware and able to respond after a short pause or time out

3

Perceptive
Aware but not able to respond effectively in the moment

2

Delayed
Aware after it happened

1

Unaware
Not aware of external state or external zone

Nonexistent ← **Ability to respond in the moment** → High

- Leadership Development
- Coaching
- Experience

What is the MBTI?

Based on:

- – Carl Jung's theory of personality types

- It is an indicator with no right or wrong answers,

- It is the world's most widely used assessment tool.

- It sorts. It does not measure. It can change over time and setting.

- It is not predictive.

- It provides a shared vocabulary to improve communication and influencing skills.

The Preferences

EXTROVERSION Energized by the outer world	**E** | **I**	**INTROVERSION** Energized by the inner world
SENSING Works with known facts	**S** | **N**	**INTUITION** Looks for possibilities & relationships
THINKING Bases decisions on impersonal analysis & logic	**T** | **F**	**FEELING** Bases decisions on personal values
JUDGEMENT Prefer planned, organized, orderly way of life	**J** | **P**	**PERCEPTION** Prefer flexible, spontaneous, adaptable way of life

E/I - How People Get their Energy

E = Extroversion

Active

Outward

Sociable

People

Many

Expressive

Breadth

I = Introversion

Reflective

Inward

Reserved

Privacy

Few Quiet

Depth

Ideas

Thoughtful

S/N - How People Gather Information

S = Sensing	N = Intuiting
What is…	What could be…
Details	Patterns Future
Present oriented	oriented
Practical	Imaginative
Facts	Innovations
Directions	Hunches
Get to the point	Multiple points of view

T/F - How People Make Decisions

T = Thinking	F= Feeling
Like a job well done	Like when people's needs are met
Head	Heart
Objective	Subjective
Cool	Caring
Impersonal	Personal
Critique	Appreciate
Analyze	Empathize
Concise	

J/P - How People Organize their Lives

Judging	Perceiving
Organized	Flexible
Plan	Options
Structure	Freedom
Control	Curious
Decisive	Openness
Start Early	Pressure-prompted
Closure	Adaptable

Extroverts and Introverts

- How do you think the other preference sees you?

- What do you want the other preference to know about you?

Judgers and Perceivers

- What do Js (or Ps) do that you admire?

- What do Js (or Ps) do that annoys you?

The Truth Is…

You know your intentions but cannot see your behaviors.

I can see your behaviors but do not know your intentions.

Understanding characteristics helps individuals make sense of the behaviors and reactions of those around them.

Influencing and Common "Function Pairs"

ST = Sensing Thinking
Straightforward, direct and efficient influencers who gather relevant facts to support a robust rationale.

"Let's Do the Right Thing"

SF = Sensing Feeling
Practical, positive and collaborative influencers who empathize with others to build a 'real' relationship.

"Let's Work Together"

NT = Intuition Thinking
Confident, reasoned and convincing influencers who present an informed and intellectual argument.

"Here's the Way Forward"

NF = Intuition Feeling
Encouraging, inspiring and impactful influencers who engage people and consider overall benefits.

"Here's Another Way"

Styles in Problem-Solving and Decision-Making

Sensing (S)	Intuition (N)
Identify relevant facts Act based on experience Determine realistic constraints Devise and implement incremental solutions Question radical new approaches	Consider many possibilities Brainstorm alternatives Solve multiple problems at the same time Consider the future Identify trends and patterns
Thinking (T)	**Feeling (F)**
Analyze the underlying issue Dissect the problem Debate or argue to surface all opinions Create or apply a model Question fundamental assumptions	Involve all parties Consider effects of decisions on others Use values to evaluate options Get buy-in from stakeholders Work to get harmony on the team

For Tonight -

- Write a brief paragraph that describes your ideal vision of yourself as a leader. You as the best leader you can imagine being. How would you describe yourself?

- Think of the most difficult or complex challenge you have ahead at work.

- Think about one thing you want to change about yourself as a leader.

- Think of a difficult conversation you had, either at work or in your personal life. Write down notes of the basic dialogue that took place. "I said…" "He/she/they said…" "I said" etc.

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Emotional Intelligence and Leadership Agility

Sally Ourieff MD
March 15, 2024

Agenda

- Why EI is important
- Emotional Systems
- Triggers and Getting Hooked
- Recognizing Patterns
- Building Emotional Agility
- EI Models
- EI Put to Use

Memorable Leaders: The Legacies that Matter Most

Best Leader

- What made them great?
- How did they get work done?
- What did they do that brought out in the best in you?
- How did they make you feel?

Worst Leader

- What made them difficult?
- How did they get work done?
- What did you learn from their behavior?
- How did they make you feel?

What Kind of Leader Do You Aspire to Be?

Four Hats of Leadership Help Drive Agility

Architect

Politician

Anthropologist

Psychologist

What is Leadership?

Leadership is the art of getting someone else to do something you want done because he wants to do it.

— Dwight D. Eisenhower —

Leadership is Behavior!

Self-awareness is the ability to not only understand our internal emotions, dialogues, and narratives but also link them to our own **behaviors**.

Awareness of others is the ability to either know others well enough to understand how their internal or situational experience is linked to their **behaviors** or be curious enough to learn more.
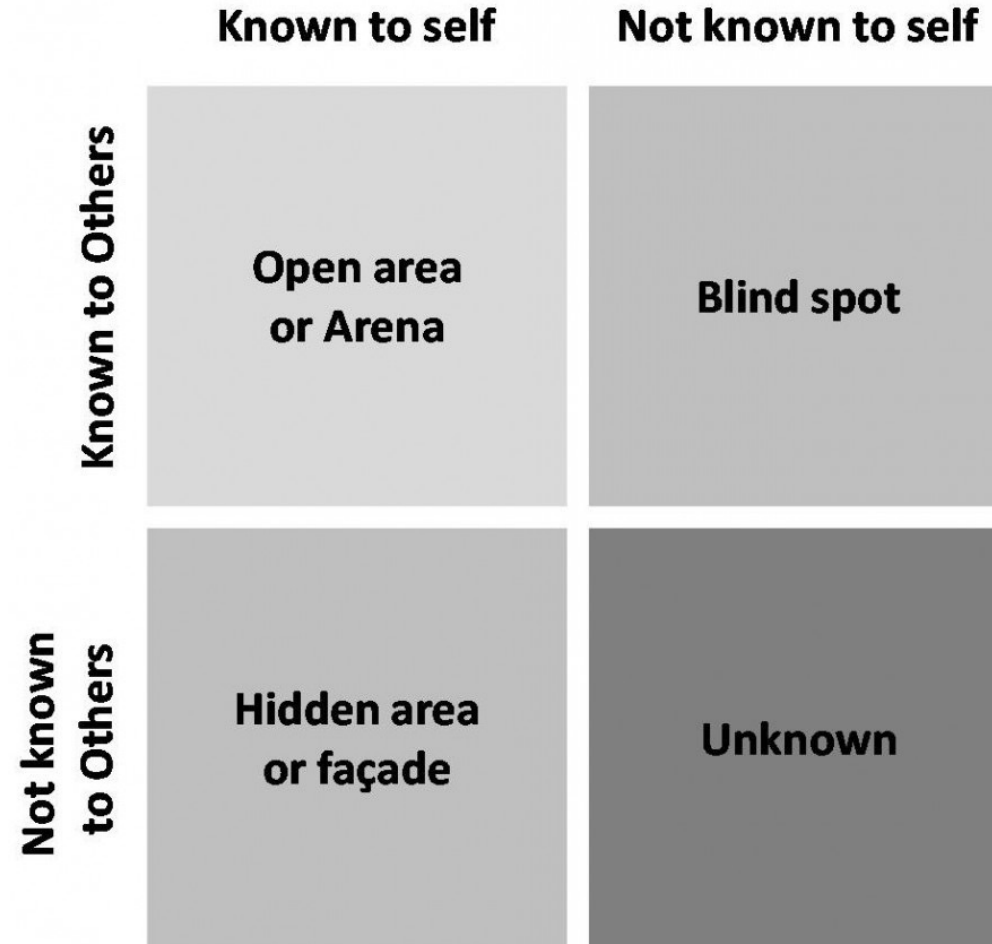
Behavior is driven by the story under the surface.

29

89
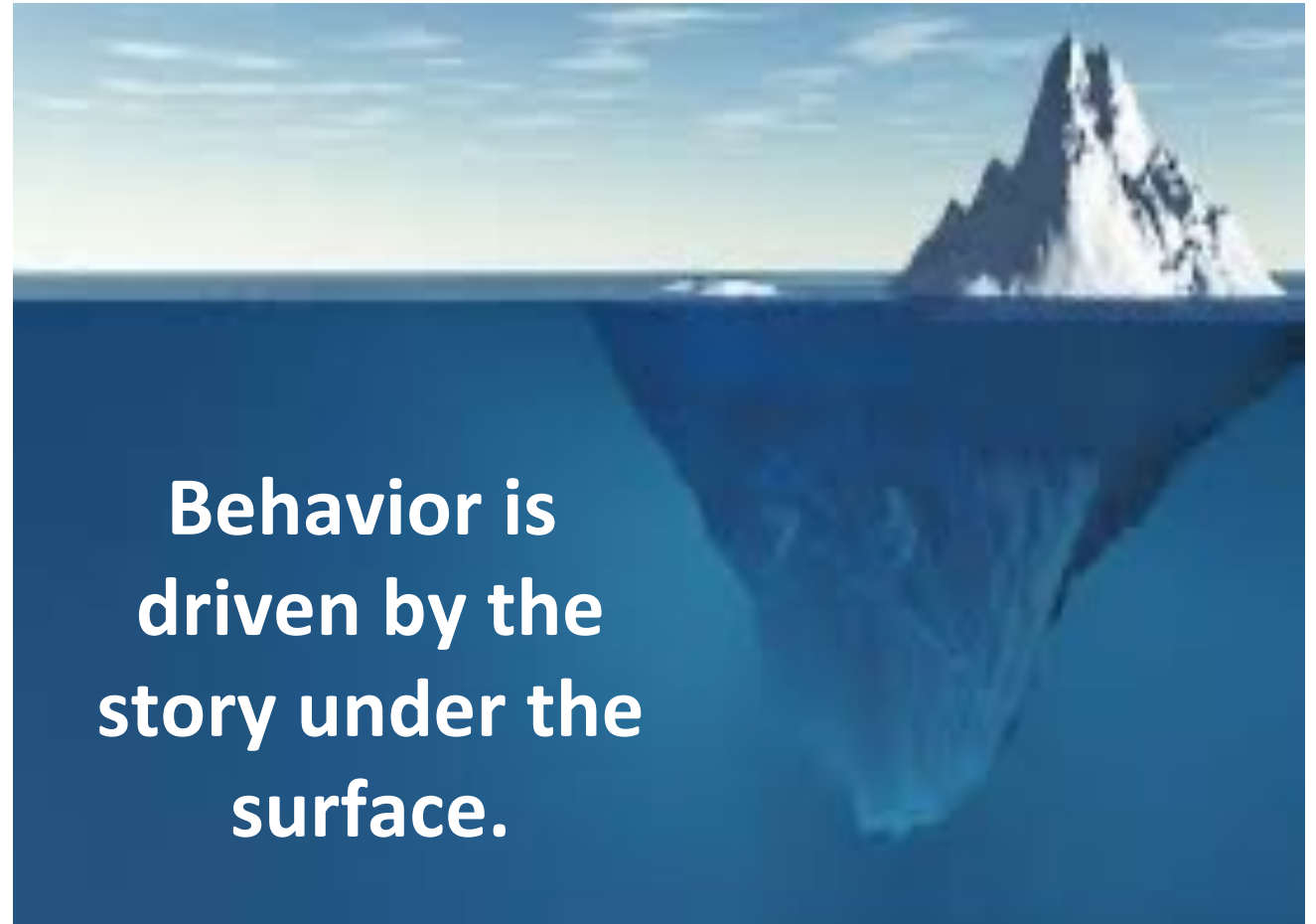
"We can be blind to the obvious, and we are also blind to our blindness."

Daniel Kahneman
Thinking, Fast and Slow

Discovering Our Blind Spots Drives Self-awareness

The Johari Window Model

When Do We Use Emotional Intelligence?
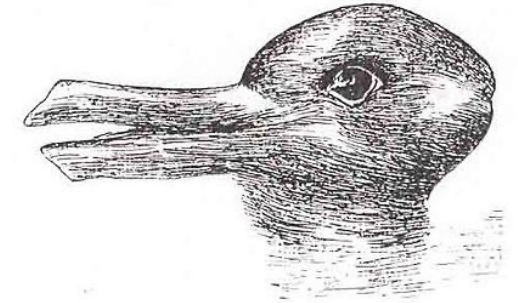
The Health Care Environment is Unstable

Volatile　　　　Uncertain　　　　Complex　　　　Ambiguous

Healthcare is a VUCA World

| **Volatile** | Turbulence in which nature, speed, volume, and magnitude of change has no pattern |
Uncertain	Lack of predictability undermines the use of experience to forecast and make decisions
Complex	Problems with numerous and difficult-to-understand causes and mitigating factors
Ambiguous	The lack of clarity about the meaning of an event

The Work of Leadership is a Duality

Execution

Relationships
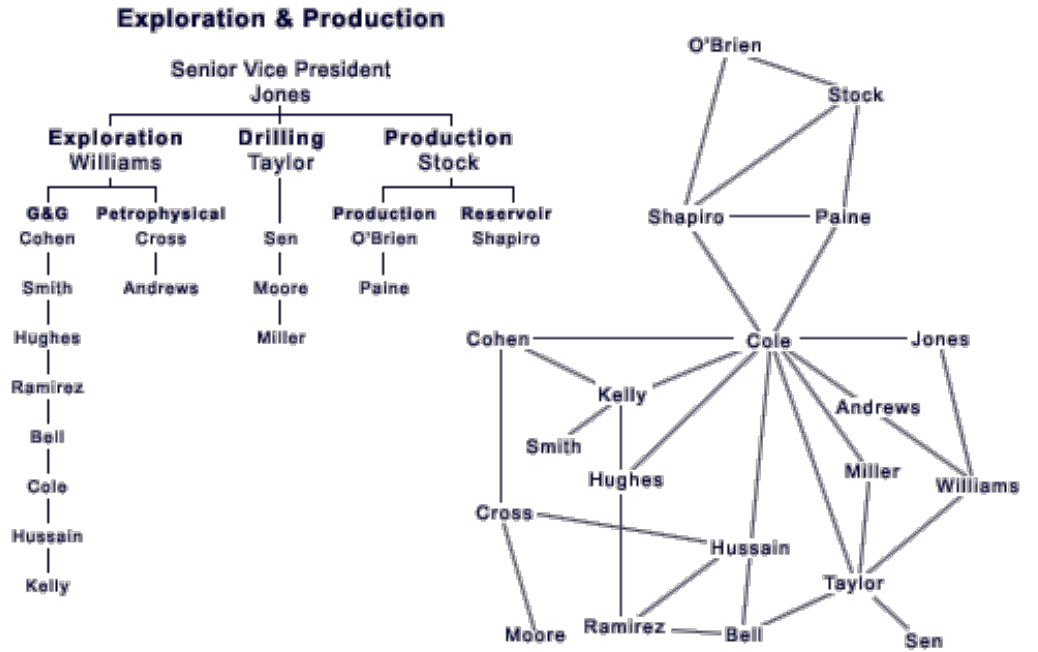
Healthcare Requires Both Executing and Learning

Industrial Age - Manufacturing Age – Information/Knowledge Age - Digital Age --- AI AGE?

Organize and Lead to EXECUTE	Organize and Lead to LEARN
Quality & Efficiency	**Innovation & Problem-Solving**
• Taylorism	• Adaptive complex systems
• Management by some fear	• Management by empowerment
• Best when work needs	• Best when work involves
o Predictability	o Adaptability to change
o Productivity	o Decisions in uncertainty
o Efficiency	o Innovation
o Quality	o Integration & collaboration

Amy Edmondson

Think about the different work you do as a clinician and leader.

- When is the priority about executing and efficiency?
- When is the priority about problem-solving, innovating, and learning?
- When is it both?

Emotional Systems

High Emotions + High Stakes ⟶ Reactivity

Emotional Flooding

+

High Stake Situations

+

Uncertain Outcomes

+

Personal History

+

Lack of Skills

Emotional Systems

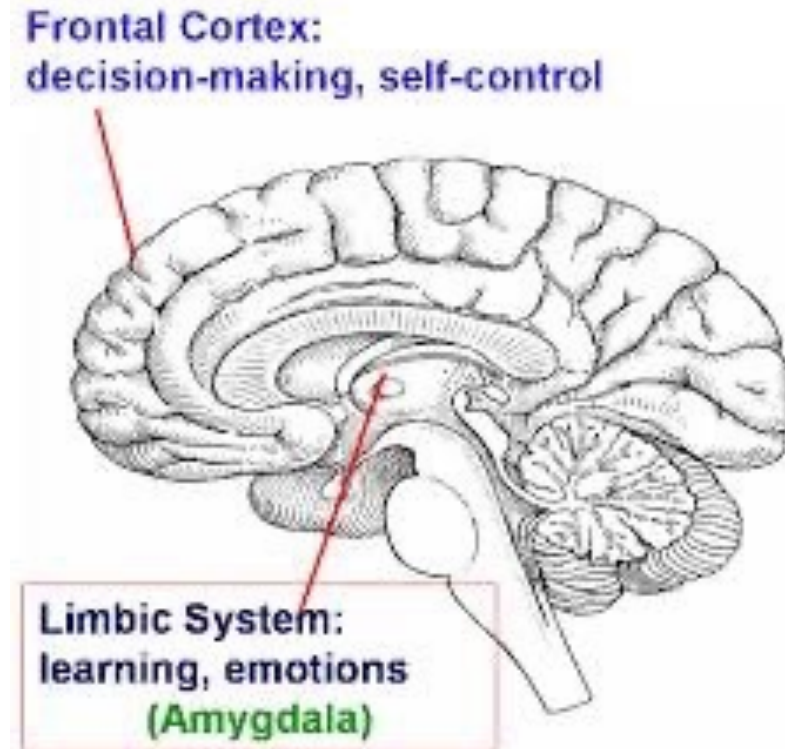Emotional economy with gains and losses through the day

Amygdala
- The train station of emotions.
- Act first – think after.

Prefrontal Cortex
- Executive function.
- Think first – then react.

Frontal Cortex:
decision-making, self-control

Limbic System:
learning, emotions
(Amygdala)

The Low Road/Hot and Cool Systems

HOT SYSTEM

Emotional

Fast/Go

"Felt"

Associative

Simple

Reflexive

Develops early

Accentuated by stress

Controlled by a stimulus

COOL SYSTEM

Cognitive

Slow

"Know"

Complex

Reflective

Develops late

Attenuated by stress

Self-controlled

Smith (2008). Divide or Conquer, Penguin Group

Stress and Threats Drive Negative Reactivity

FLIGHT = Breaking off
Avoiding
Withdrawing
Masking Resentment

FREEZE = Giving in

FIGHT = Striking Back
Controlling
Labeling
Intimidating
Attacking

SILENCE
Feel had
Always starting over
Rewards their bad behavior

HOSTILITY
Win the battle
Lose the war

Patterson K., et. al. Crucial Conversations (2002)

Negative Emotional Attractor

Function	Reaction
Physiological	Fight or flight **Greater sympathetic influence** Release of epi, norepi, cortisol to mobilize defenses Increase pulse, blood pressure, breathing Lower heart rate variability
Neurological	Stimulates Task Positive Network Inhibited neurogenesis
Emotional	**Negative affect**: defensiveness, guilt, shame, fear, anxiety "Ought to" or "Should" identity
Cognitive	Decreased executive functioning Limited field of vision/perception Decreased listening Increases local attention Increases prevention focus Increases performance orientation and problem-solving Increases causal and logical reasoning
Relational	Dissonant (out of sync or distant)

Positive Emotional Attractor

Function	Reaction
Physiological	Greater parasympathetic influence Release of oxytocin and vasopressin Decreased blood pressure Higher heart rate variability
Neurological	Stimulates Default Mode Network to PFC Neurogenesis
Emotional	Positive affect: hope, joy, amusement, optimism, elation, self-awareness, well being
Cognitive	Enhanced working memory Global attention and perceptual openness Promotion focus Learning orientation Better decision-making Creativity
Relational	Resonant (in tune with each other), increased altruism, cooperation, conciliation, social engagement

Do you know what you are feeling?
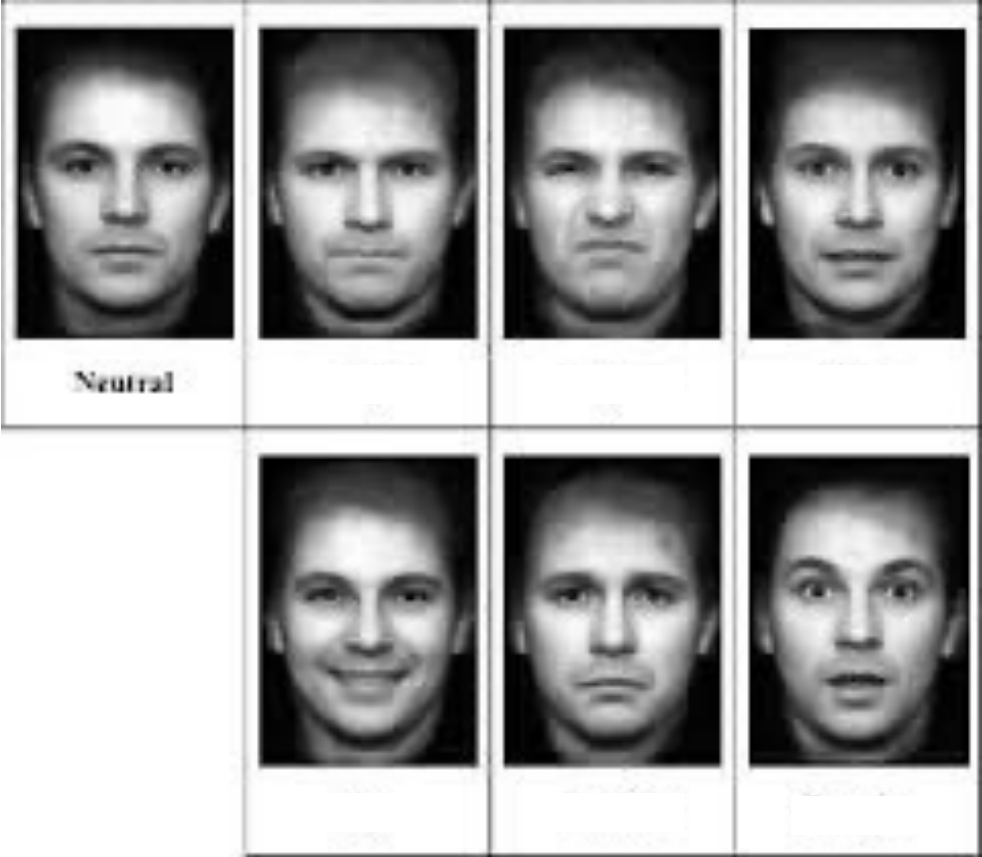
https://greatergood.berkeley.edu/quizzes/ei_quiz/take_quiz

Negative Emotions Take a Greater Toll

2012 Cornell Facebook Experiment
- 689,000 News Feeds were manipulated
- Negative news feeds led to more negative status messages.
- Positive news feeds led to more positive status messages.
- Less emotional News Feeds led to shorter messages.

Negative emotions lead to greater rumination, depression, and anxiety

Negative emotions are more readily recalled and valued more highly.

What are Your Conflict Hot Buttons?

Fill out the Triggers worksheet.

Discuss with your partner:

- What triggers you the most?
- How do you react?
- What is your body language, tone, voice?
- What helps you manage?

We Get Hooked - Bottle or Brood?

**Bottlers – Push emotions to the side and get on with things.**

- Rationalize
- Never get at the root issue
- Can amplify or "build-up" over time
- Trying to gain control
- Emotional leakage

JUST DEAL

Brooders – Ruminate and stew in a spiral of thoughts and feelings.

- Focus continually on what happened
- Can flow into worry about what's going to happen
- Self-focused
- Loss of perspective
- Trying to work through it
- Emotional flooding

CAN'T LET GO

Also Driven by Our Cognitive Distortions

Emotions ⟷ Cognitive Distortions, Biases, Habits
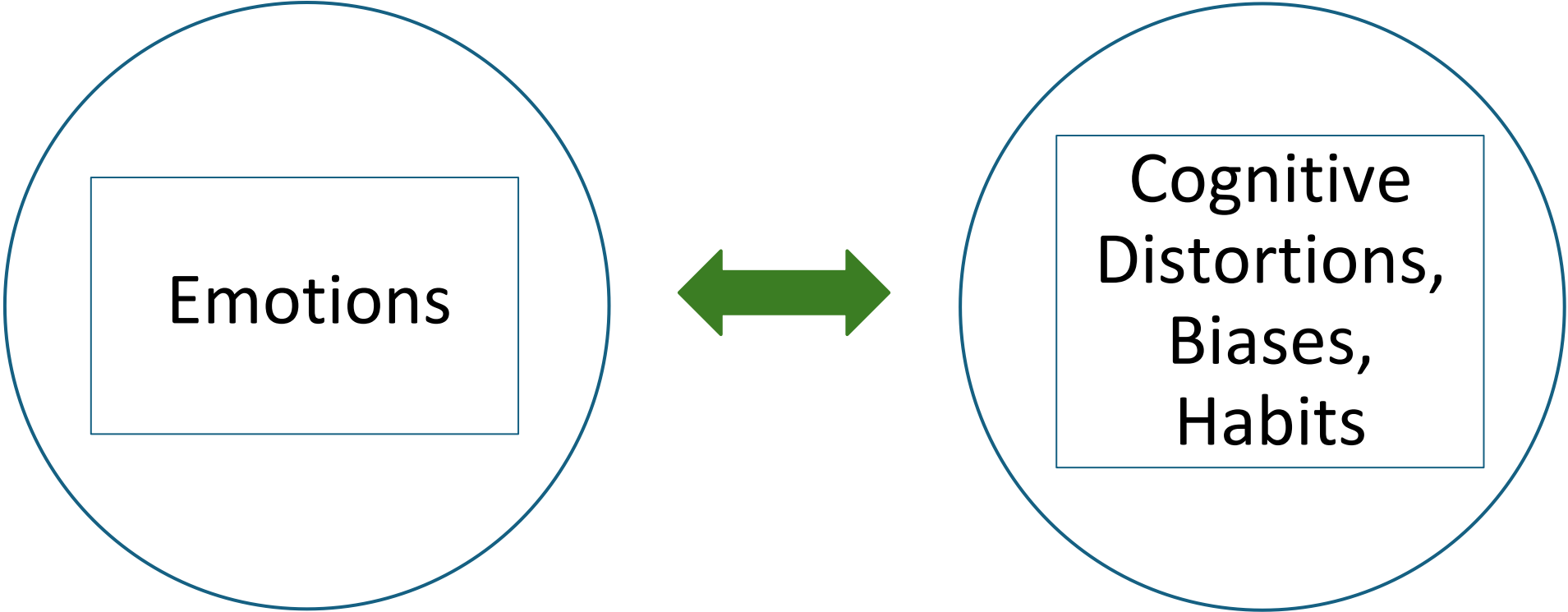
Self-Management Worksheet

- Do you tend to bottle up or brood over difficult feelings?

- What cognitive habits pop up?

The Things We Do When We Can't Manage!

- Manipulate and deny reality
- Scapegoat and blame
- Externalize
- Bully
- Speak first to shut down others
- Toxic Positivity

Emotional Intelligence Models

EI Definition

"The capability of individuals to recognize their own emotions and those of others, discern between different feelings and label them appropriately, use emotional information to guide thinking and behavior, and manage and/or adjust emotions to adapt to environments or achieve one's goal(s)."
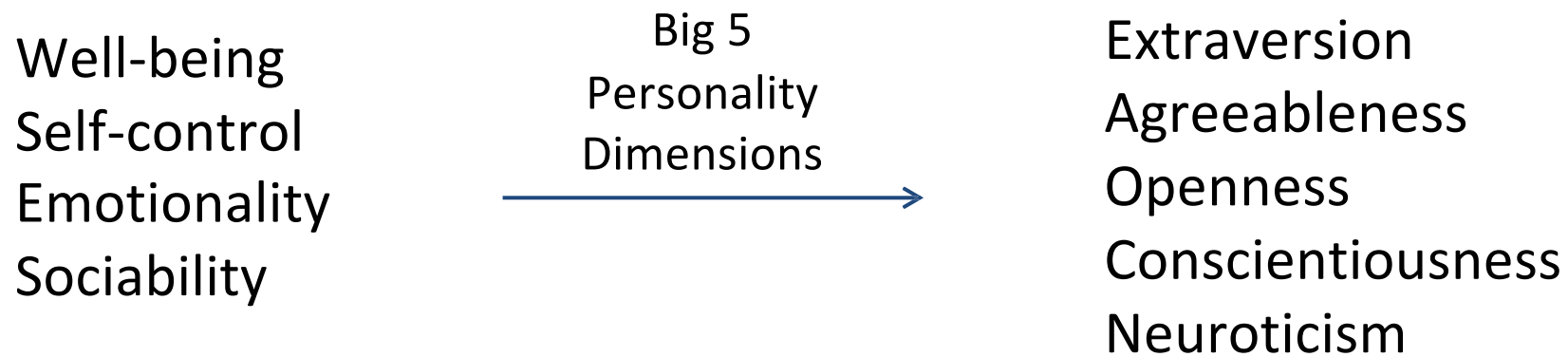
Oxford Dictionary of Psychology

Ability Model

2001 Salovey and Mayer – Mayer Salovey Emotional Intelligence Test (MSCEIT)

- EI is a cognitive ability separate but related to intelligence.
- Emotions help you navigate and perceive changes in your environment.
- Mood drives different perspectives and how you reason.

Salovey, Peter; Mayer, John; Caruso, David (2004), Psychological Inquiry,

Trait Model

2000   K.V. Petrides

- Emotional intelligence is closer to a personality trait.
- EI encompasses behavioral dispositions.
- EI is based on a constellation of emotional self-perceptions.

Well-being
Self-control
Emotionality
Sociability

Big 5
Personality
Dimensions

→

Extraversion
Agreeableness
Openness
Conscientiousness
Neuroticism

Petrides, K. V. (2011). Ability and trait emotional intelligence. In T. Chamorro-Premuzic, S. von Stumm, & A. Furnham (Eds.), The Wiley-Blackwell handbook of individual differences (pp. 656–678). Wiley Blackwell.
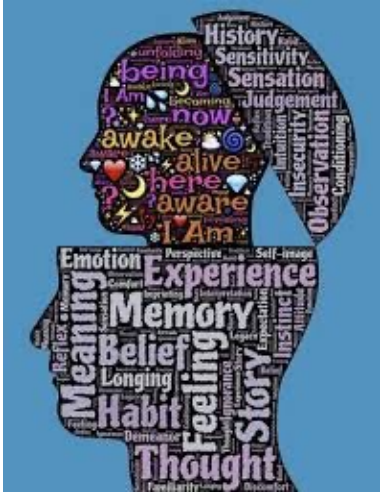
Mixed Model

1998 D. Goleman

- Showed that EI was separate from IQ.
- Both born with EI and you can learn it.
- EI encompasses wide array of emotional and social competencies and skills.
    1. Self-awareness
    2. Self-regulation
    3. Social skill
    4. Empathy
    5. Motivation

4 Domains of Emotional Intelligence

Self-Awareness

Ability to perceive your emotions in the moment and understand your tendencies.

Social Awareness

Ability to sense the emotions in others and understand what is driving them.

Self-Management

Ability to use your awareness to stay flexible and direct your behavior positively.

Relationship Management

Ability to use awareness of emotions to manage interactions successfully.

Bradberry and Greaves, (2009). Emotional Intelligence 2.0, Talent Smart

Emotional Intelligence Domains and Competencies

SELF-AWARENESS	SELF-MANAGEMENT	SOCIAL AWARENESS	RELATIONSHIP MANAGEMENT
Emotional self-awareness	Emotional self-control	Empathy	Influence
	Adaptability		Coach and mentor
	Achievement orientation	Organizational awareness	Conflict management
			Teamwork
	Positive outlook		Inspirational leadership

High EI

Correlates to

- Better social relations for children and adults
- Better family and intimate relationships
- Better relationships at work and in negotiations
- Better psychological well-being and life satisfaction
- Perceived more positively by others
- More self-compassionate

You Build Emotional Intelligence Through…

- Observation
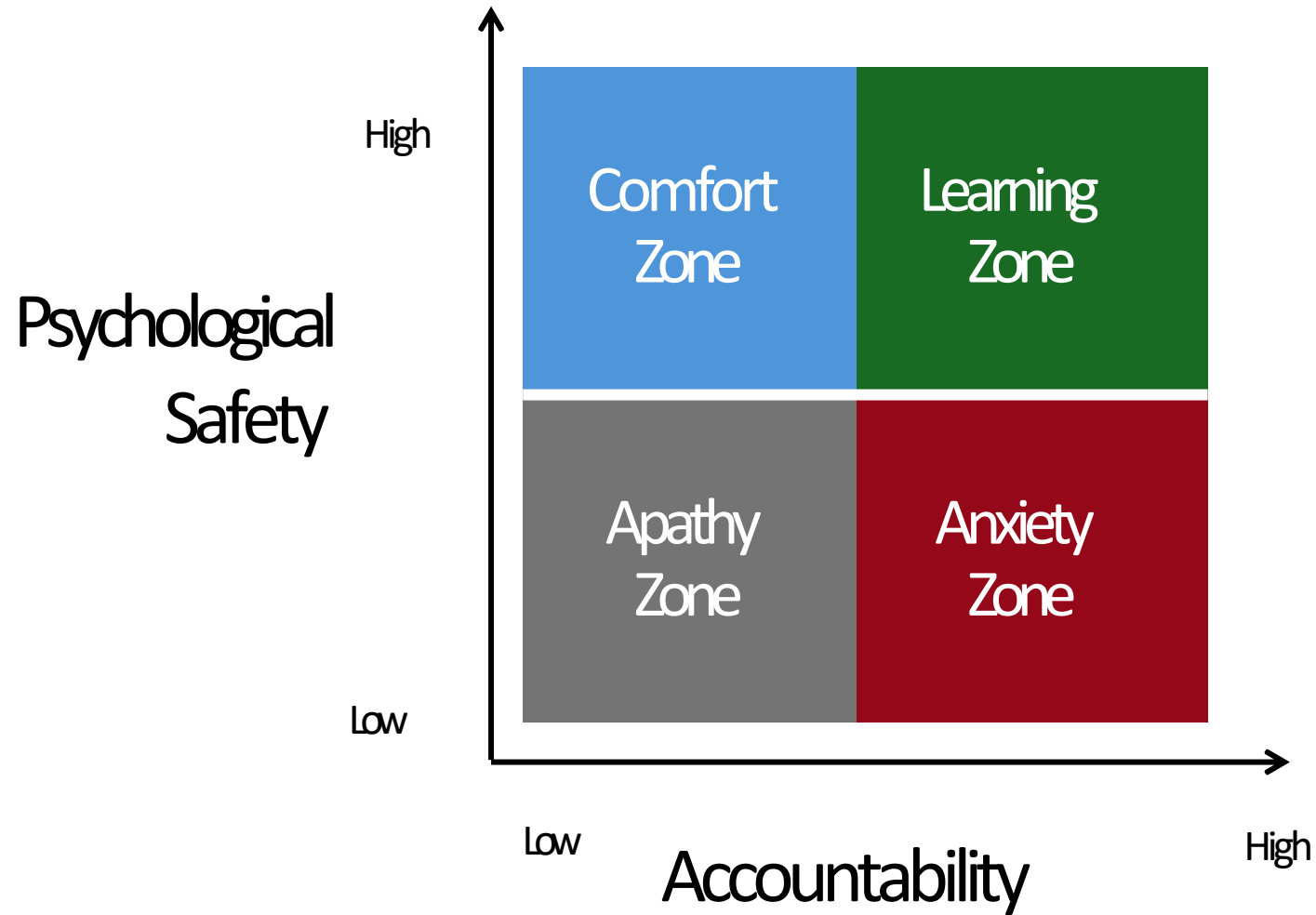- Acceptance
- Separation
- Intention
- Values

Emotional Intelligence in Leadership Strategies

- Creating safety
- Situational leadership
- Influencing

Psychological Safety Builds High Performance

Safety + Accountability

Psychological Safety (vertical axis, High to Low) vs Accountability (horizontal axis, Low to High):
- Comfort Zone (High Safety, Low Accountability)
- Learning Zone (High Safety, High Accountability)
- Apathy Zone (Low Safety, Low Accountability)
- Anxiety Zone (Low Safety, High Accountability)

Amy Edmondson

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It Is Often a Risk Assessment

Is It Safe? Is It Worth It?

HIGH SAFETY LOW IMPACT "I'll speak up, but it won't matter."	**HIGH SAFETY HIGH IMPACT** "I speak up because it's safe and worth it."
LOW SAFETY LOW IMPACT "It's just not worth it."	**LOW SAFETY HIGH IMPACT** "I'm afraid to speak up, but the stakes are too high to remain silent."

Vertical axis (top): SAFETY — (bottom): FEAR
Horizontal axis (left): APATHY — (right): IMPACT

How to Make It Safe for People to Speak Up at Work
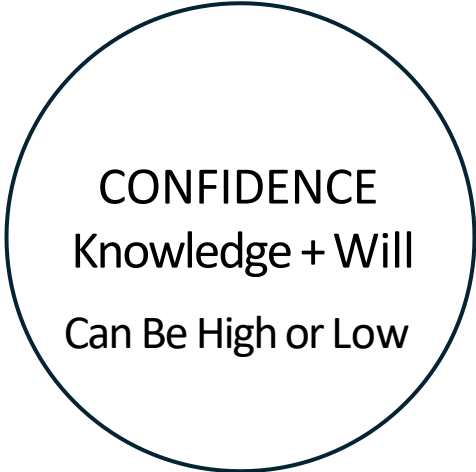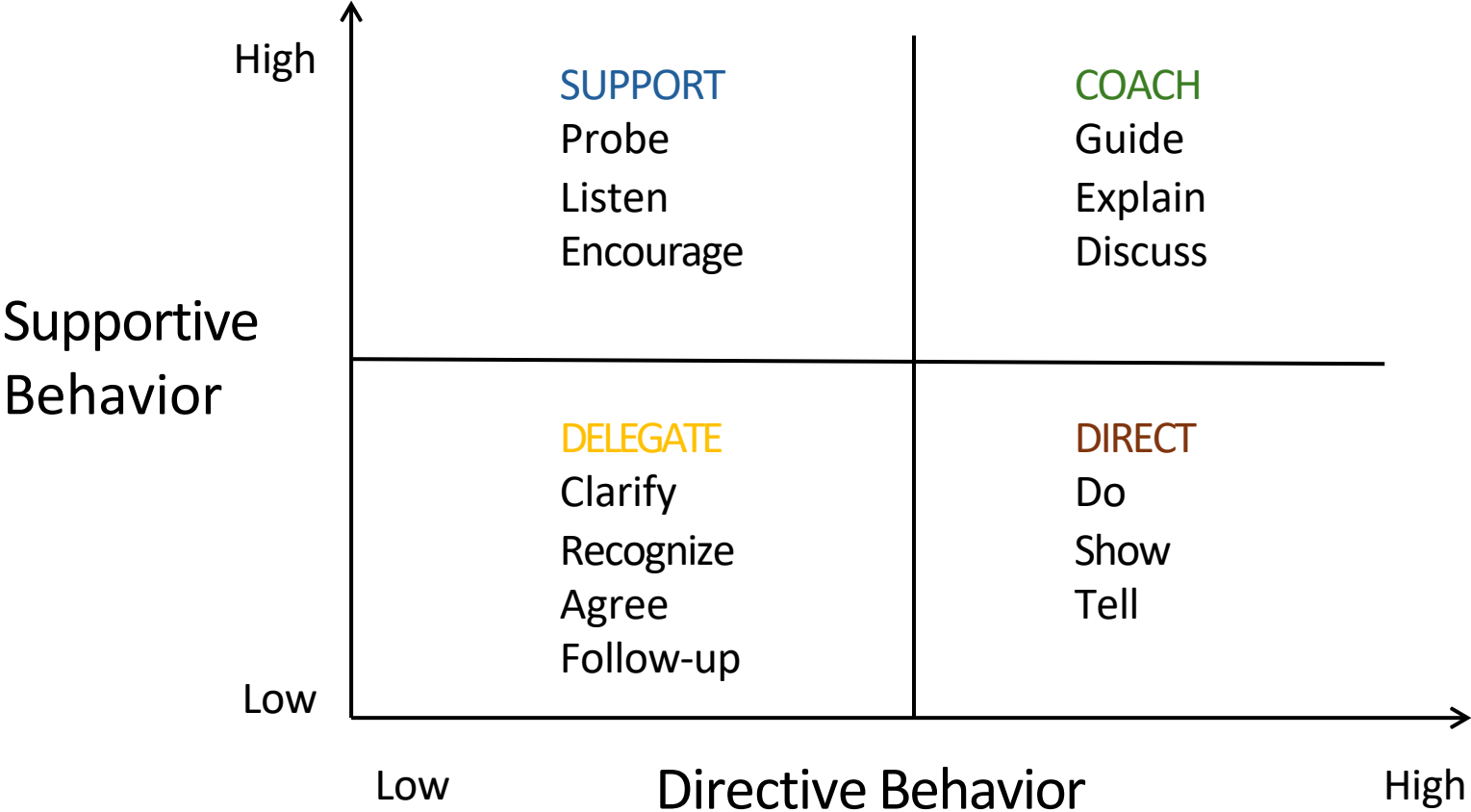S.Shedletsky, Greater Good Magazine, Nov. 11, 2023, Berkeley University

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Think of a difficult meeting or conversation.

Did you feel safe to speak up? Why?

Did you not feel safe to speak up? Why? What might have made a difference?

EI in Situational Leadership

High

SUPPORT
Probe
Listen
Encourage

COACH
Guide
Explain
Discuss

Supportive
Behavior

DELEGATE
Clarify
Recognize
Agree
Follow-up

DIRECT
Do
Show
Tell

Low

Low   Directive Behavior   High

CONFIDENCE
Knowledge + Will

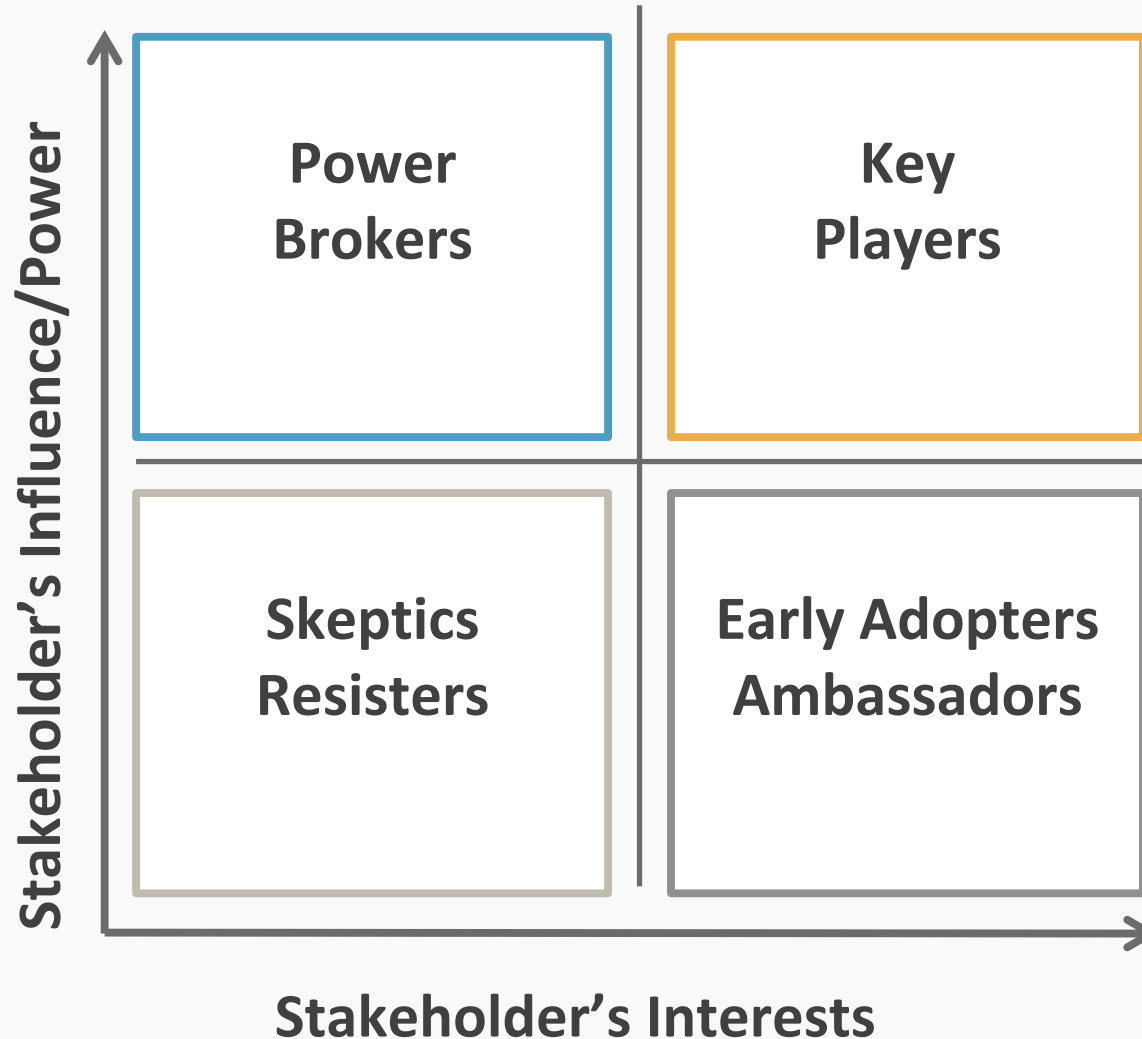Can Be High or Low

67

EI in Influencing
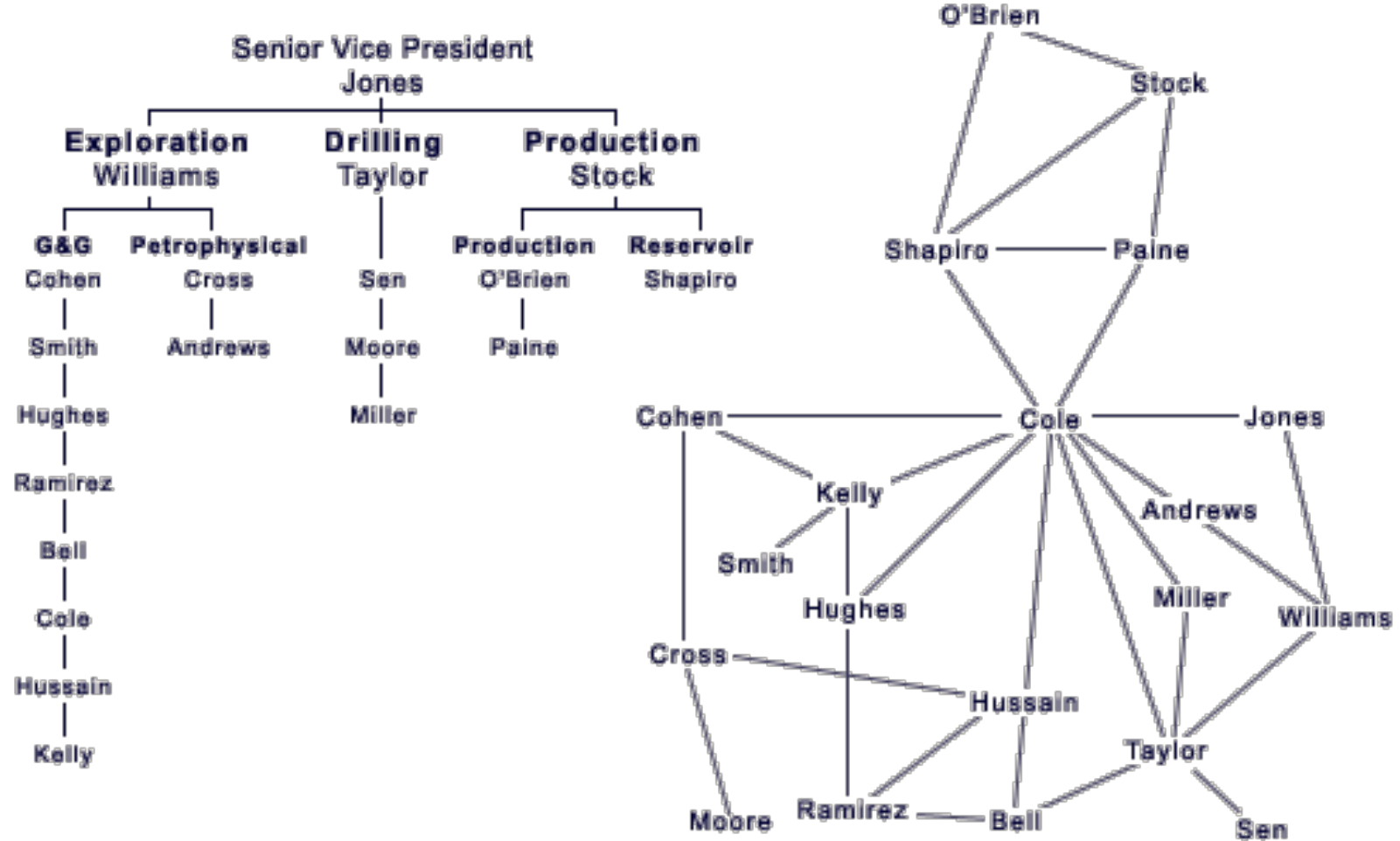
Stakeholder Analysis – Whom Do We Need to Succeed?

Power Brokers
- Have power
- Leverage interests
- Make things happen

Skeptics/Resisters
- Dislike change
- May lose something
- Constructive critics

Key Players
- Take up the mantle
- Do the work
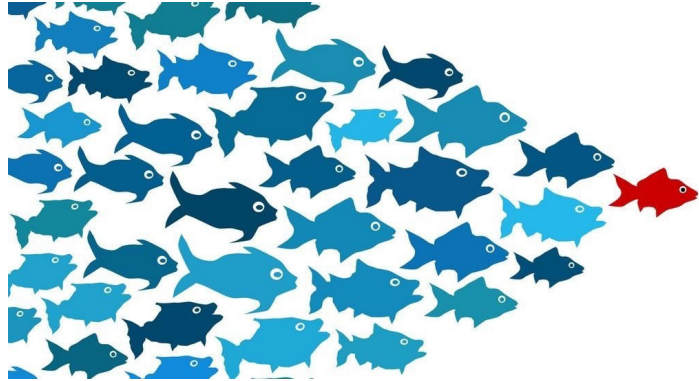- Engaged and
- collaborative

Early Adopters
- Innovative
- See big picture
- Possible influencers

(vertical axis) **Stakeholder's Influence/Power**

(horizontal axis) **Stakeholder's Interests**

Power Brokers	Key Players
Skeptics Resisters	Early Adopters Ambassadors

Influencing Tools

Currencies

Approaches

Who Are You Trying to Influence?

What is valued?

What pressures do they have?

What do they care about?

What are they working on?

What is their history?

What are the expectations of their boss and peers?

Engagement Roadmap **Worksheet**

Stakeholder	Assess Your Relationship	Understand Their World	What Matters	Plan	Reflect & Adapt
Role	Rate the following aspects of your relationship (High, Med, Low)	Politics Priorities Culture	Motivation Needs/Interests	Approach Actions Milestones	Impact Relationship Now Learning
	Rapport Receptiveness Responsiveness				

Vertical Development and Transformational Change

Sally Ourieff MD
March 15, 2024

Agenda

- Development Through the Ages
- Robert Kegan's Stages of Adult Development
- Torbert and Rooke's Seven Ways to Lead
- Expanding Mindsets to Meet Healthcare Challenges

Leadership Development Fills AND Expands the Cup

Horizontal development puts more water in the cup.

Vertical development expands the cup.

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Kegan's Theory of Adult Development

"…coping well with the demands of modern life is not just related to any particular set of skills; it is also related to the way individuals make meaning about the world. These ways of making meaning of the world aren't inborn but are developed over time as we increase our capacity to take perspectives, view authority in new ways, and see shades of grey where we once saw only black and white."

Berger,J.G. EdD, (2006). Using the Subject-Object Interview to Promote and Assess Self-Authorship.
Development and Assessment of Self-Authorship. In M.B. Magolda, E.F. Creamer and P.S. Meszaros (Eds.),
Development and Assessment of Self-Authorship (Chapter 14). Sterling, VA: Stylus Publishing.

Piaget's Cognitive Development

Stage	Age	Development
Sensori-Motor	Birth - 2 years	• Differentiates self from objects • Self as agent • Object permanence
Pre-operational	2 – 7 years	• Learns language and represents things with words and images. • Egocentric – difficult to take other's perspectives. • Classifies by single features.
Concrete operational	7 – 11 years	• Thinks logically about objects and events. • Achieves conservation of number, mass, and weight. • Classifies by multiple features and can order by a single dimension.
Formal operational	11 years up	• Can think logically about abstract propositions. • Can test hypotheses systematically. • Concerned about the hypothetical, the future, and ideological problems.

# Erik Erikson's Psychological Stages of Development

Stage	Age	Crisis	Virtue
1	0-1	Trust vs. Mistrust	Hope
2	2-3	Autonomy vs. Shame & Doubt	Will
3	4-6	Initiative vs. Guilt	Purpose
4	7-12	Industry vs. Inferiority	Competence
5	13-19	Identity vs. Role Confusion	Fidelity
6	20-34	Intimacy vs. Isolation	Love
7	35-65	Generativity vs. Stagnation	Care
8	65+	Integrity vs. Despair	Wisdom

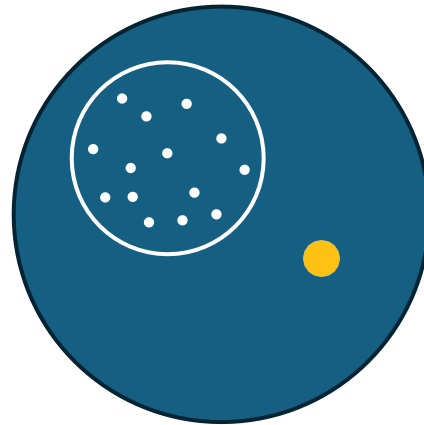# Kegan's Stages of Development

Level 3
Socialized Mind
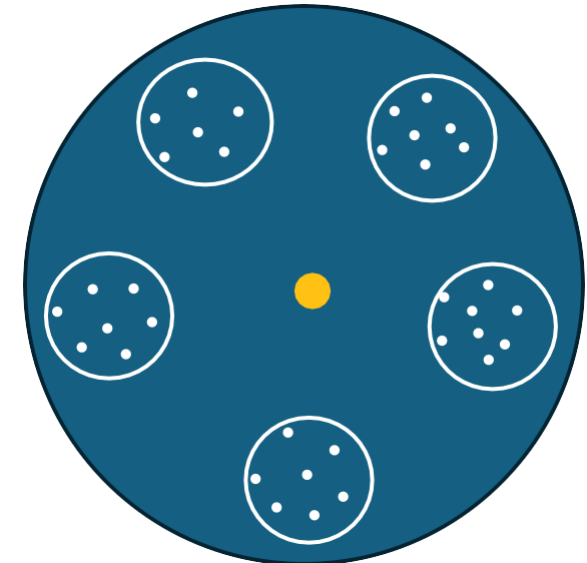Dependent conformer
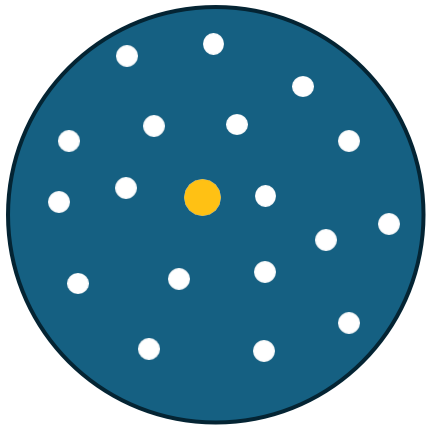
Level 4
Self-authoring Mind
Interdependent collaborator
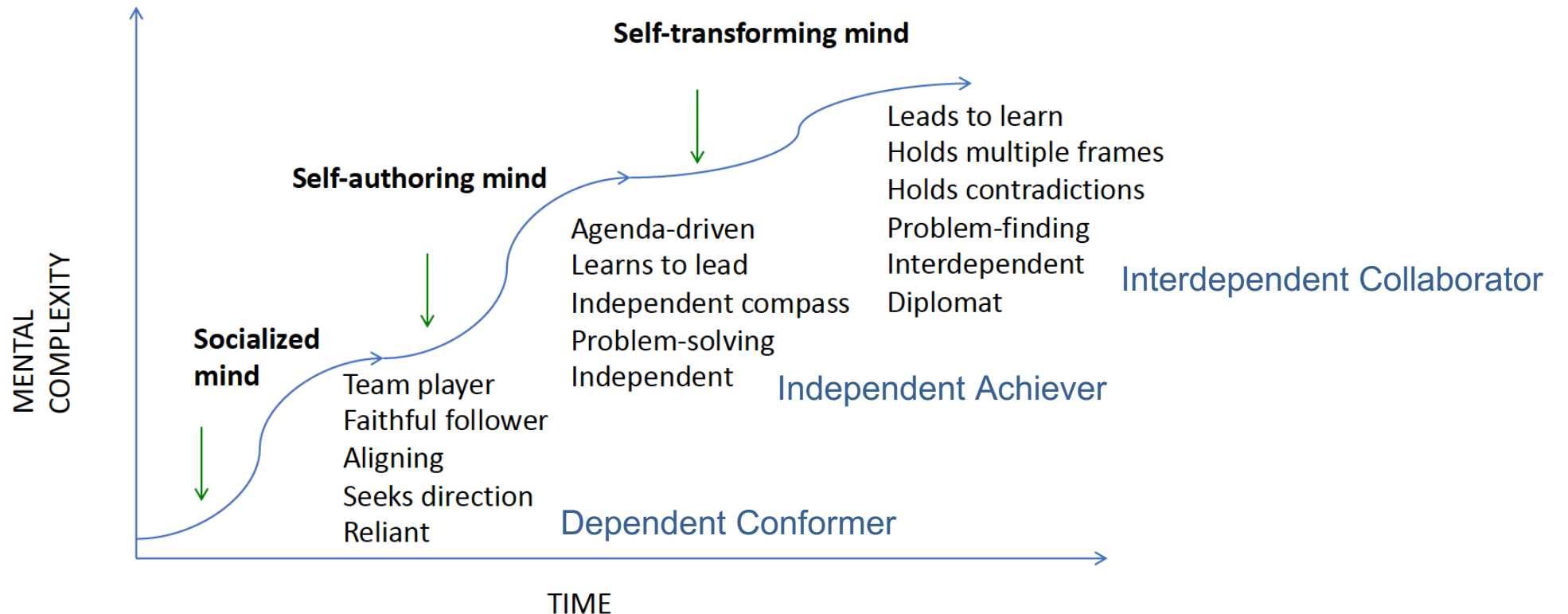
Level 5
Self-transforming mind
Independent Achiever

From Conformer to Achiever to Collaborator

Adult Development

Adapted from Casasola, T.(2016) Business Development and People Development Are the Same Thing.
https://medium.com

Vertical Stages

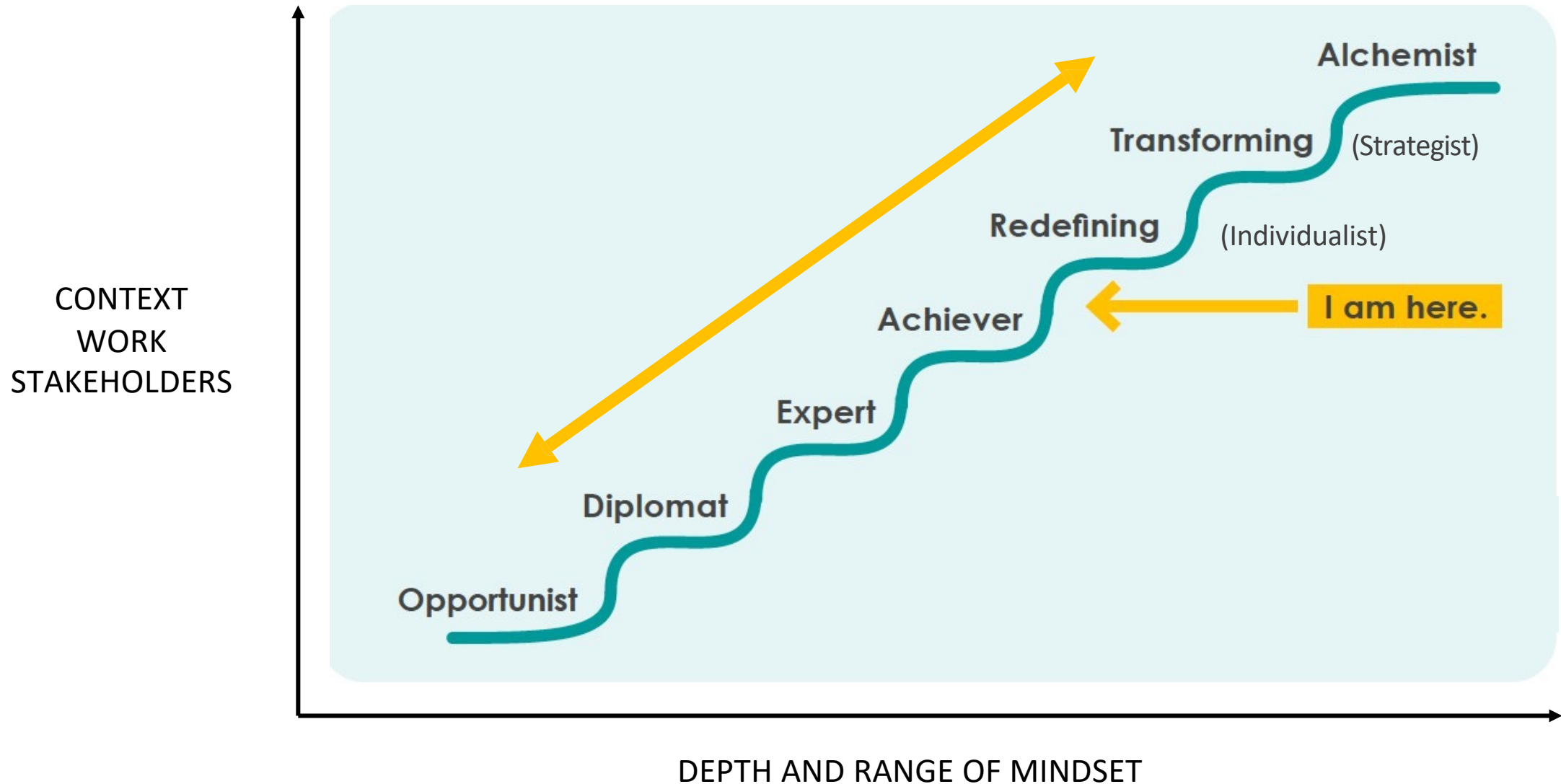| Competencies	Dependent - Conformer	Independent - Achiever	Interdependent - Collaborator
Strategic Thinking	• Short-term view • Tactical tasks • Black and white • Either/or • High need for certainty	• Medium-term view • Sees parts of the system • Sees some patterns and connections	• Long-term view • Sees many shades of gray • Sees many patterns and connections • Accepts uncertainty as the norm
Leading Change	• Expects change to come from above • Needs and trusts authority to give direction • High need for certainty	• Has own views about best change • Sees the mechanics of change needed • Success is achievement of individuals and teams	• Change is a collaborative process • Comfortable with ambiguity • Success means realization of a shared vision
Conflict	• To be avoided • Authority is in charge • Feels torn by conflict	• Worked out behind closed doors • Produces winners and losers	• Healthy way to gather more views • Something to be encouraged • Increases learning and performance
Leading across Boundaries	• Trust allies and people you know • Them versus us • Distrust of outsider	• Able to think from others' perspectives • Horse trades for favors • Focused on success of own silo	• Sees the world through others' perspectives to understand more • Share knowledge across boundaries • Works in partnership with other functions

Vertical Development, Part 2, N.Petrie.
Center for Creative Leadership, 2013

7 Ways of Leading

Alchemist

Transforming (Strategist)

Redefining (Individualist)

← I am here.

Achiever

Expert

Diplomat

Opportunist

Torbert's and Rooke's Seven Ways of Leading

Action Logic	Characteristics	% of Leaders	Effect as Leaders
1. Opportunist	**Wins any way possible.** Self-oriented; manipulative; "might makes right."	5%	Significantly less effective at implementing organizational strategies.
2. Diplomat	**Avoids overt conflict.** Wants to belong; obeys group norms, rarely rocks the boat.	12%	
3. Expert	**Rules by logic and expertise.** Seeks rational efficiency.	38%	
4. Achiever	**Achieves goals through teams and with appreciation for outside forces.** Juggles managerial duties and market demands.	30%	Effective manager. Action- and goal-oriented.
5. Individualist	**Integrates competing personal and organizational goals.** Creates unique structures to resolve gaps in motivation, strategies, and performance.	10%	Consistent capacity to innovate and transform organizations.
6. Strategist	**Generates organizational and personal transformations.** Exercises the power of mutual inquiry, vigilance, and vulnerability for both the short and long.	4%	
7. Alchemist	**Generates social transformations.** Integrates material, spiritual, and societal transformation.	1%	

Exerpt from *Seven Transformations of Leadership* by David Rooke and William R. Torbert, *Harvard Business Review*, April 2005. More information is available at www.harthill.co.uk.

Mindset Needs to be Agile and Situational

CONTEXT
WORK
STAKEHOLDERS

Alchemist

Transforming (Strategist)

Redefining (Individualist)

Achiever

I am here.

Expert

Diplomat

Opportunist

DEPTH AND RANGE OF MINDSET

76

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Where do you currently live in your own development?

Where do you believe your boss lives?

Where does your role generally ask you to live?

How people grow Vertically

There are **three primary conditions** that need to exist in order for vertical growth to happen.

1. Heat Experiences

Leaders grow fastest when they find themselves in situations that create heat. Heat experiences have 5 criteria

i.   First time experience
ii.   Results matter
iii.   Chance of success or failure
iv.   People are watching
v.   It is extremely uncomfortable

2. Colliding Perspectives

a. Surrounding yourself with people who think very differently to you. Your ideas might often clash with theirs in productive ways.

b. Connecting with people outside of your normal network

c. Seeking other people's perspectives about challenges you are facing

3. Reflection on Experiences

a. Getting on the balcony to make sense of the experiences you are having

b. Learning new lessons from novel situations and people

c. Reconfiguring your: values, beliefs, identity

Vertical Development, Part 2, N.Petrie.
Center for Creative Leadership, 2013

Think about your most most complex, difficult challenge at work. Share it with a partner who will serve as your coach.

Discuss -

1. How is this challenge pushing you out of your comfort zone?
2. Who will be there to offer new perspectives?
3. How might this work change your values and beliefs?
4. What mindset(s) are required for you to move forward?

Skills to Push Growth

Positive Psychology – Reinforcing moments of flow, strength, and mastery

Active Listening – Summarizing, paraphrasing, clarifying

Powerful Questions – Open-ended, Reflective, Hypothetical, and More...

Critical Thinking – Exploring root cause understanding, clarifying direction, creating options, analyzing impact

Developing Sensing – Expanding ability to notice and absorb key elements

Perspective Taking – Challenging points of view and assumptions

Reflection – About self and others

Self-management – Moving beyond reactivity
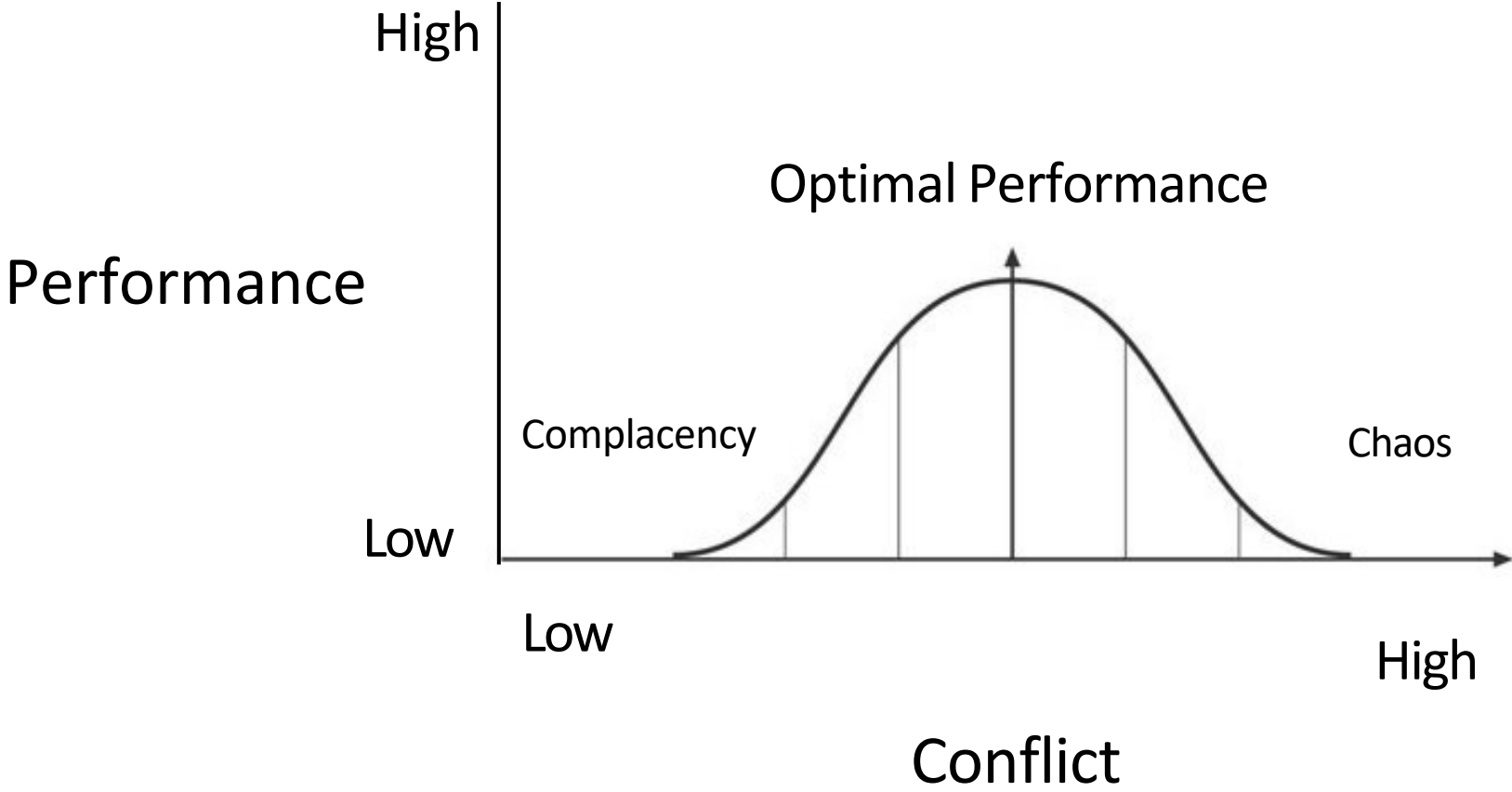
MYSTERY ACTIVITY

Difficult Conversations and Communication

Sally Ourieff MD

March 15, 2024

Agenda

- Conflict Statistics

- Conflict Responses

- Conversation Dynamics

- Practice

Productive Conflict Drives High Performance

Performance (vertical axis, Low to High) vs. Conflict (horizontal axis, Low to High). Bell curve showing "Optimal Performance" at peak, "Complacency" on the low-conflict side, and "Chaos" on the high-conflict side.

Vecchio, Robert P. (2006) Organizational Behavior, Thompson South-Western.

Conflict is Ubiquitous - Frequency and Training

- 85% of all employee's experience conflict.

- 2.1 hours/week spent in conflict.

- 57% witnessed conflict leading to insult or injury.

- 27% witnessed conflict leading to a personal attack.

- 12% caused by gossip/rumors.

- 33% of resignations is because of conflict.

- 75% feel their managers could do better.

- 60% have had no training in conflict resolution.

- 58% have had no training in building trust with colleagues.

- 54 - 72% see it as healthy or a positive outcome from conflict handled well.

https://zipdo.co/statistics/workplace-conflict/

Causes and Impact

- Employees feel 56% projects fail from poor communication

- 60 – 80% caused from strained relationships

- 62% from different values and perspectives

- 40% from workload tensions

- 33% differences in style or strategy

- 10% from lack of transparency

- 65% of performance problems are result of strained relationships not incompetence

- Employees are 12% less effective

- Higher management spends 20% of their time on conflict resolution

- Conflict costs companies $359B/year

- Unresolved conflict can negatively impact company success by 20-30%

Difficult situations

Most People Avoid Addressing Conflict

Informal Survey of 500 executives

|	
Didn't want to create a bad atmosphere	29%
To avoid confrontation	18%
Didn't know what to say	16%
Worried about the reprisals	11%
Thought it might make the situation worse	11%
Didn't want to upset someone	8%
Other reasons - lack of back up, lack of time	7%

Inaction is an Action – There is Always a Cost

"It is not only what we do, but also what we do not do,
for which we are accountable."

~Moliere

Thomas Kilmann Model - Patterns of Conflict Response
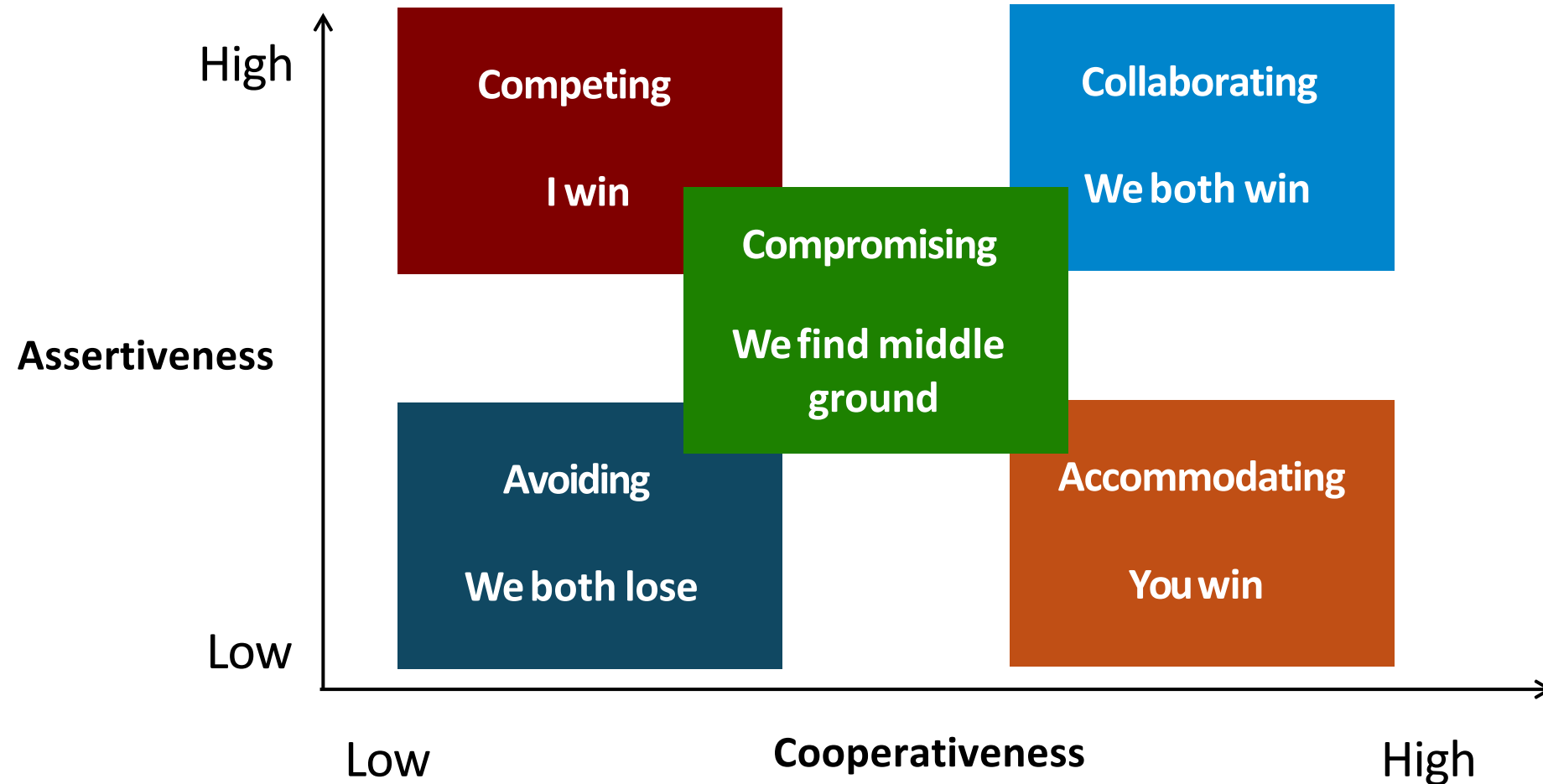
They Can All Be Productive or Problematic

AVOIDING - **"Leave well enough alone"** – Unassertive and uncooperative
- Do not address the issue.

COMPETING - **"Might Makes Right"** - Assertive and power-oriented mode
- Your concerns at the other's expense.

COLLABORATING - **"Two heads are better than one**" - Both assertive and cooperative
- Look for solution that fully satisfies concerns of both.

COMPROMISING - **"Split the difference**" – Intermediate between assertive and cooperative
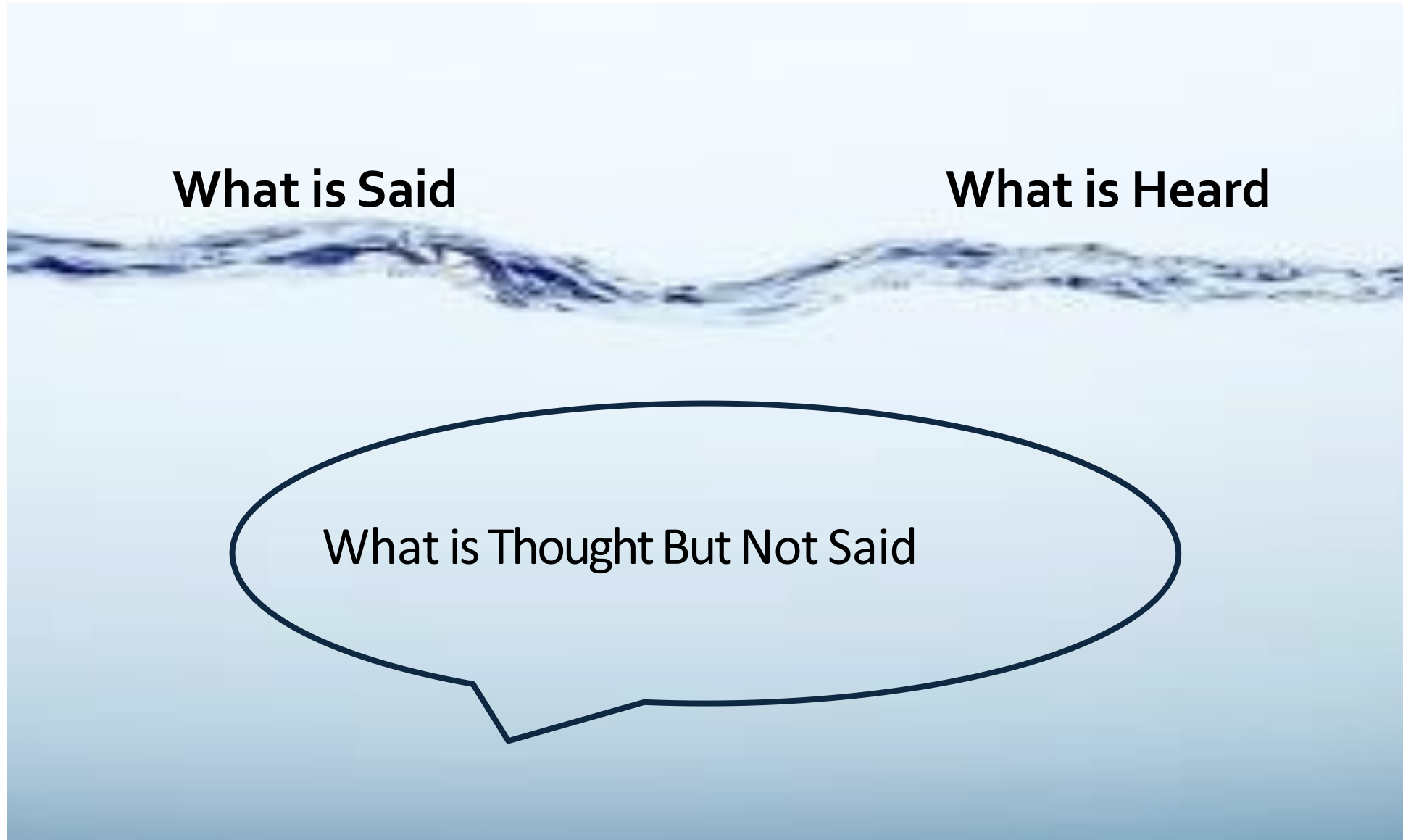- Find a mutually acceptable solution.

ACCOMODATING - **"Charity and selflessness"** – Unassertive and cooperative
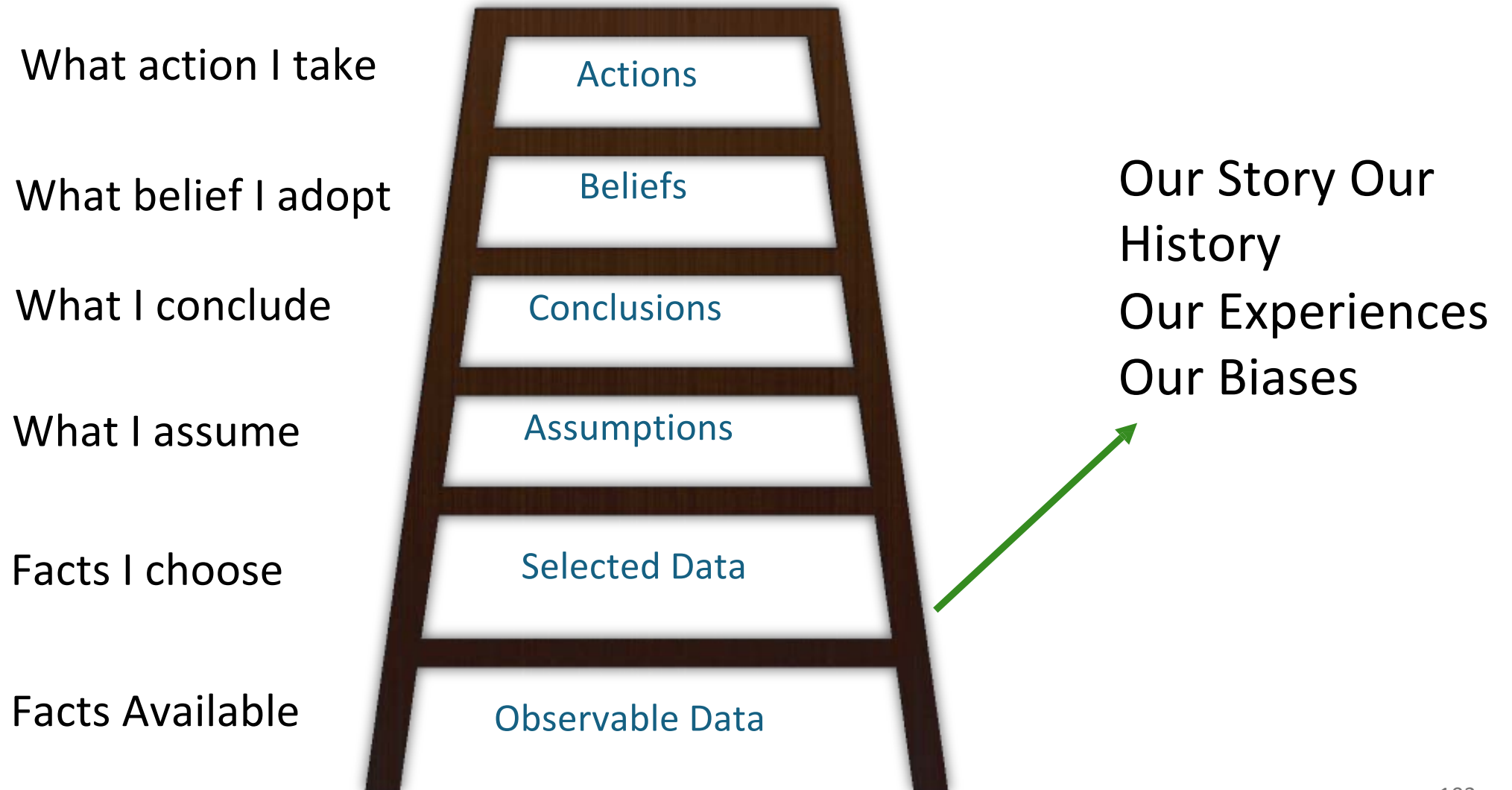- Neglect your own concerns to satisfy those of the other person.

Conversation Dynamics

Thought Bubbles

What is Said   **What is Heard**

What is Thought But Not Said

Chris Argyris' Ladder of Inference

What action I take — Actions

What belief I adopt — Beliefs

What I conclude — Conclusions

What I assume — Assumptions

Facts I choose — Selected Data

Facts Available — Observable Data

Our Story Our History
Our Experiences
Our Biases

Exercise – Thought Bubble

Listen to the dialogue.

Write down what you are thinking as you listen during the conversation.

- What is in your thought bubble?
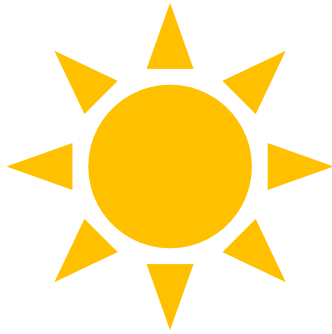- What assumptions are your making?

Your Thought Bubbles

1. Refer to the dialogue you wrote down from a recent difficult conversation.
2. Right down the unspoken thoughts and assumptions you had during the conversation.
3. Right down what you imagine their unspoken thoughts and assumptions were.
4. Discuss the conversation with your partner and reflect on how you might have tested your assumptions or handled the conversation differently.

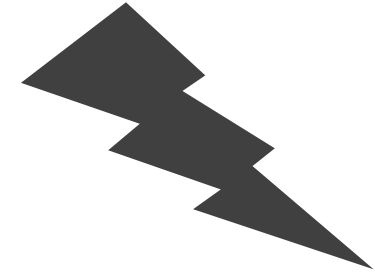| Your Assumptions	Dialogue	Their Assumptions

The SCARF Model of Social Experience

REWARD RESPONSE

THREAT RESPONSE

- Status
- Certainty
- Autonomy
- Relatedness
- Fairness

The neural bases of social pain: Evidence for shared representations with physical pain
N. Eisenberger, Psychosom Med. 2012 Feb; 74(2): 126–135.

"Most people do not listen with the intent to understand; they listen with the intent to reply."

- Stephen R. Covey.

Use Inquiry More Than Advocacy

A 2x2 matrix with Advocacy on the vertical axis (HIGH/LOW) and Inquiry on the horizontal axis (LOW/HIGH):

	Inquiry LOW	Inquiry HIGH
Advocacy HIGH	Explaining / Asserting / Imposing	Mutual Learning / Explains Reasoning / Seeks Other Views
Advocacy LOW	Observing / Withdrawing	Interviewing / Interrogating

Senge (2006. The Fifth Discipline:
The Art and Practice of the Learning Organization.
Doubleday

Be Curious – Ask Questions

Open-ended   ⟶   "Can you clarify?"
"How did that unfold?"
"Can you tell me more?"

Reflective   ⟶   "Let's see if I get this right…"
"I think what I am hearing is…"
"With emotions running so high, are we able to continue right now?

Hypothetical   ⟶   "If we did this, what would happen?"
"Suppose we…"

Simulation Exercise and Debrief
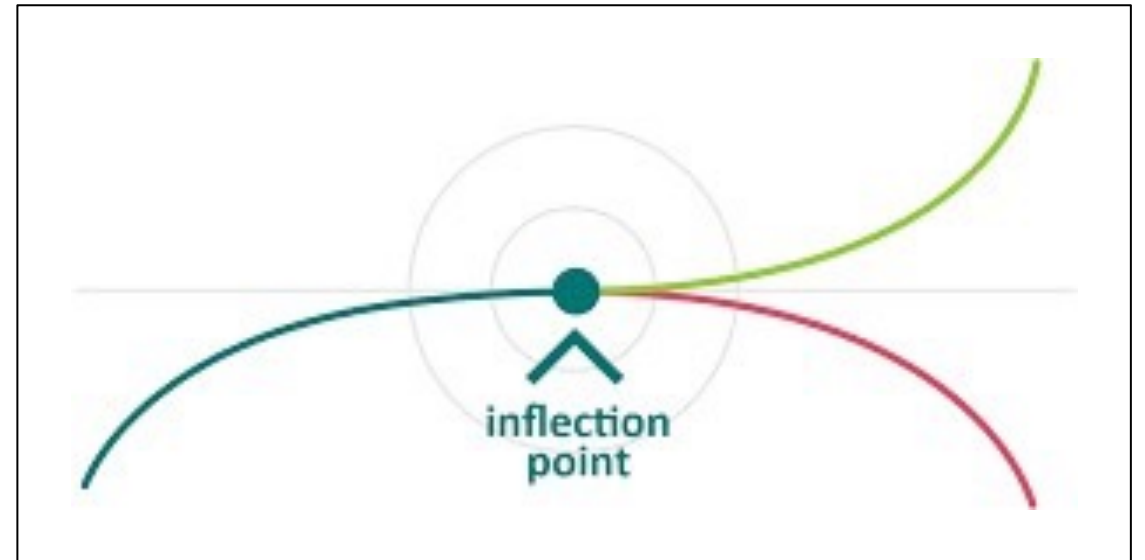
Immunity to Change

Sally Ourieff MD
March 15, 2024

Agenda

- Inflection points
- Immunity to change
- Transforming commitments

Inflection Points Can Become Crucible Moments

Point of a curve at which there is a change of direction.

inflection point

Everyday is an Opportunity to Pivot

"Inflection points change the way we think about things. They present an opportunity that only occurs periodically. And they possess a kind of latent motivational energy, which, when recognized and harnessed, can unleash potential that one wouldn't seize otherwise."

"Very few people see inflection points as the opportunities they often are: catalysts for changing their lives; moments when a person can modify the trajectory he or she is on and redirect it in a more desirable direction," he continued. "Whether it's a new job, a change in a relationship, or something else, an inflection point is one of those periodic windows of opportunity when a person can pause, reflect, and ask: 'Self, do I want to continue on this path or is now the moment to change direction?'"

Howard Stevenson, HBS professor
Eric Sinoway author of Howard's Gift

Moment of Inflection

Think of something you have tried to change in yourself but haven't been able to.

What Gets In the Way of Change?

Immunity to Change

Robert Kegan Ph.D.

Lisa Lahey Ed.D.

Competing or Hidden Commitments

"Resistance to change does not reflect opposition, nor is it merely a result of inertia. Instead, even as they hold a sincere commitment to change, many people are unwittingly applying productive energy toward a hidden competing commitment. The resulting dynamic equilibrium stalls the effort in what looks like resistance but is in fact a kind of personal immunity to change."

Kegan R., Lahey L. The Real Reason People Won't Change,
Harvard Business Review, November, 2011.

We Need to Discover Our Hidden Commitments

Goal → **Behaviors** → **Commitments** → **Assumptions**

IMMUNITY MAP WORKSHEET

What I Want to Change	Behaviors That Go Against My Goal	Hidden Competing Commitments	Big Assumptions
		Worry Box	
What I Need To Do Differently		**Competing Commitments**	

Instructions

1. What would you like to see changed at work, so that you could be more effective or so that work would be more satisfying? Write it down in the Goal box.

2. What are you doing or what do you wish you were doing to meet your goal? Write them down in the Actions to Achieve My Goals.

3. What are doing that is keeping your commitment from being more fully realized? You don't need to explain or understand these current behaviors that are getting in the way just write them down in the Behaviors That Work Against my Goals box.

4. If you imagine doing the things that will help you meet your goal, do you detect any discomfort, worry, or vague fear? Write your worries in the Worry Box.

Instructions continued

5. Look across columns 1, 2, and 3. You will see one foot on the gas and the other on the break. By engaging in this undermining behaviors, what worrisome outcome(s) are you committed to preventing?

These are your Hidden Commitments. Write them in the Competing Commitments box.

Hidden commitments ARE NOT weaknesses but a form of self-protection.

The Process - Underlying Assumptions

6.   What are you protecting yourself from and why? What assumptions are you making that make each hidden commitment feel necessary? "If I did not honor my hidden commitment, then X (my assumption) will come true."

"Assumptions are…the beliefs and internalized truths we hold about how the world works, how we work, and how people respond to us."

Lahey

Write your assumptions in the Assumption box.

IMMUNITY MAP WORKSHEET

What I want to change. My Goal	Behaviors that go against my goal.	Hidden or Competing Commitments	Big Assumptions
I have too much on my plate. I have too many people asking me to do things. I want to focus on only those things that are most important to my role and work goals. I want to be feel less overwhelmed.	I take on any task or project that I am asked to do. I get distracted by interesting things even when they are unrelated to my goals. I spend too much time on things that are neither important nor urgent. I get into the weeds too deeply with my team. I still feel I can do things best. I misjudge how long things will take.	**Worry Box** I will miss out on things. I will let people down. People will stop considering me for opportunities. It won't get done well.	If I put my own goals first, I assume people will think I care less about them. If I don't do it myself, I assume others will think I am incapable or passing off my work. If I don't say yes, I assume people will not offer me interesting opportunities in the future. If it is not done my way, I assume it won't be as good.
What I tried and need to do differently. I have tried to say no. I try to not bring work home. I try to delegate more. I need to give people more room to do things their way. I need to keep my focus on our department's strategic goals.		**Competing Commitments** I am committed to giving to others. I am committed to putting myself last. I am committed to doing interesting things. I am committed to excellence.	

A Change of Language Across the Map

From

- Goal as complaint

- Continuing behaviors that you can blame on others and the complaint.

- Make a New Year's Resolutions that will likely be broken.

- Be unaware of assumptions that "hold" you and drive unproductive behaviors.

To

- Goal as commitment

- Assume personal responsibility for unproductive behaviors

- Uncover competing commitments to understand what is getting in the way.

- Uncover assumptions you "hold" so you can begin to question them.

Next Steps for Getting Unstuck

- Observe and note your behaviors in relation to your big assumption.
- Search for experiences that would cause you to contradict your assumption and become more aware of confirmation bias and filtering experiences to fit your assumption.
- Reflect on your history and where the assumption began to develop.
- Test small changes in your behavior and see what happens.
- Evaluate the results

The Building Blocks of Leadership

Thursday, Friday, and Saturday Agenda

Thursday Evening – Sally Ourieff MD

7:30 – 9:00 pm Introduction and Your MBTI Style and Preferences

Friday – Sally Ourieff MD

8:00 – 10:00 am	Emotional Intelligence
10:00 – 10:15 am	Break
10:15 – 12:00 pm	Vertical Development in Leadership
12:00 – 1:30 pm	Lunch
1:30 – 3:30 pm	Difficult Conversations and Communication
3:30 – 3:45 pm	Break
3:45 – 5:30 pm	Immunity to Change

Saturday – Sally Ourieff MD and Coaches

7:30 – 9:30 am	Life Portrait and GELM Feedback Review
9:30 to 9:45 am	Break
9:45 – 11:00 am	Life Portraits and GELM Feedback Review
11:00 am – 11:15 am	Reflections and Take Aways
11:15 am – 11:30 am	Course Assessment