

December 9th 2021



INSPIRED, PURPOSE-DRIVEN TEAMS

Purpose-Driven Leaders

InspireCorps | Jen Grace Baron, Peter Boyd, Gabi Joyce, Katie Giasullo



INSPIRING TEAMS

Kick-off

David Hochberg



Kick-off

How did pre-work go?
PPPP to David?
SP360?
Chat with buddy?

- Andy and Vernon
- Dan and Lars
- Josh and Eng Hoe
- Jason, Peter and David
- Jen and Penghai
- Aarnoud and Mateusz



WORKSHOP SUMMARY

Personal Leadership

Team Leadership

Wider Company and System Engagement

Dates <i>(Suggested tbc)</i>	Thurs October 28th	Thurs Nov 4 th	Thurs November 18th	Thurs December 9 th	Thurs January 6th	Thurs January 20th
Time	Normally 7am CT, 8am ET, 2pm CET, 8pm Singapore, 10pm Sydney					
Duration	45-60min				4 x 2hr	45-60min
Focus of Session	Intro People, Framework(s) + Pre-work	Self	Self	Team & Macquarie-wide (DH in Geneva)	Creating Change: From Self to System	Wrap-up / reflection / celebration (& new-year accountability check-in if Jan date preferred)
Example Tools and Key Elements	<ul style="list-style-type: none"> • Intros: to people • Intros: to concepts • Norms 	<ul style="list-style-type: none"> • Intro to Purpose-Driven Leadership: From Purpose to Performance • Listening skills • Purpose mapping and Connecting Work 'Rocks' (SharePoint) 	<ul style="list-style-type: none"> • Reviewing PDL – Individual • Leader Summit 	<ul style="list-style-type: none"> • Personal & Team Values • Dealing with human vs market adversity: Ladder of inference, SBI Feedback • Influence from Full to min control: Johari, Skill-Will, Stakeholder Matrix • Team – Purpose, Priorities, Potential and Performance 	<ul style="list-style-type: none"> • <i>Shift Positive 360 results</i> • Work on One Page as enduring tool (co-led with David H) • Time (what's over/under) • [Intro to system thinking] 	<ul style="list-style-type: none"> • Team reflections and look forward – and requests for help • Where has change been positive • Where do we still need to focus?

PURPOSE-DRIVEN, CONNECTED LEADERSHIP

...From Self To Team

“Be yourself, only better”

PURPOSE
PRIORITIES
POTENTIAL
PROGRESS

“...If you want to go far, go together”

PURPOSE Unified Vision + Mission
PRIORITIES Aligned across the team
POTENTIAL Common view of future
PROGRESS Transparent + Accountable



Welcome Back

1. Diversity & Identities – Bring it in

Diversity of people and ideas is proven to breed innovation, resilience & excellence. It's actively encouraged here (and to seek it in your work and life *outside* this room too!).

Identities that are important to you are important here

2. Inclusion & Subtleties

If you need anything said or done to make you feel **truly welcome**, please let us know and please use the 'chat'

3. Be Kind and Be Present: Pen and Paper - no competing screens please



The Power of Purpose-Driven Teams...

Connected
Leader



*How You Show
Up For Each
Other*

Values, Norms,
Principles

*How - and How
Much - You Bring
To Each Other*

Listening +
Feedback
Your 'Arena'

*How You Tailor
Approach*

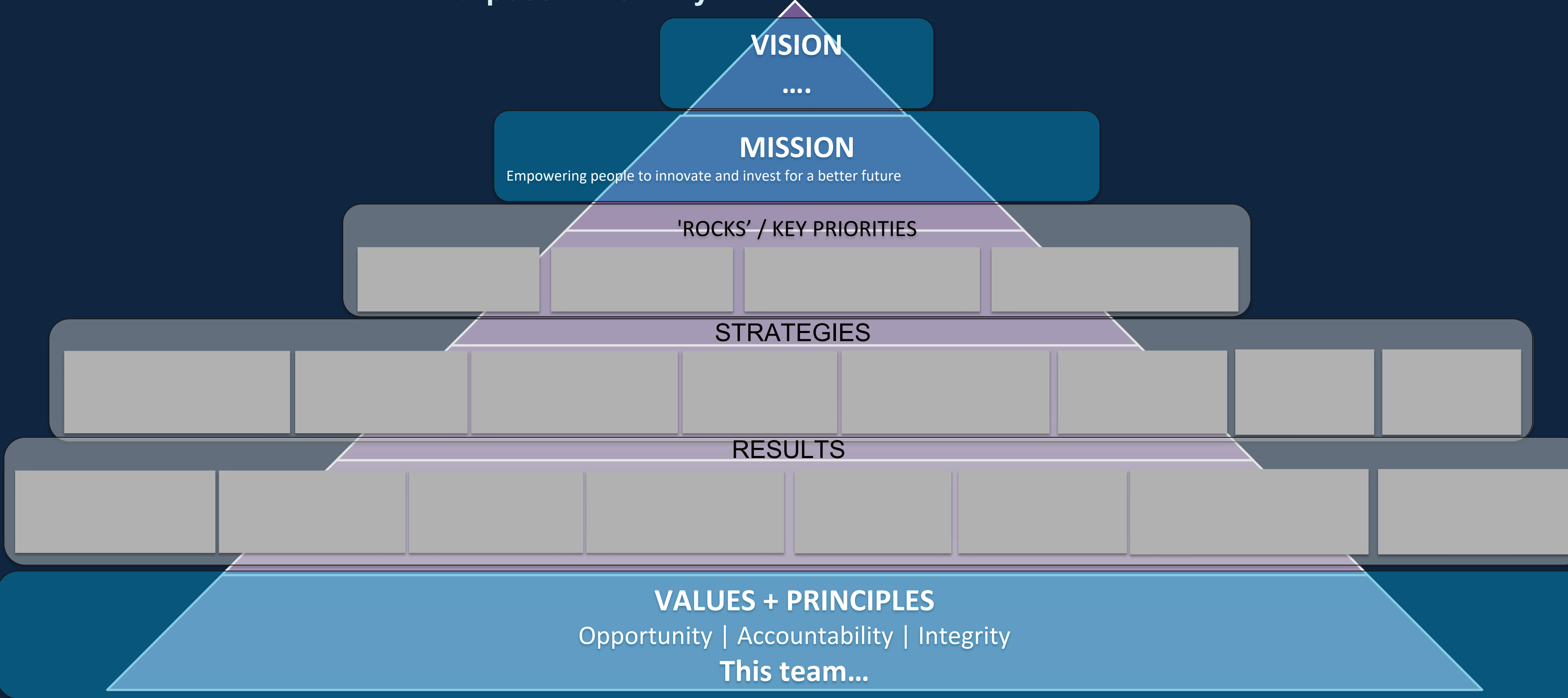
2 more 2x2s:
Skill-Will +
Stakeholder
Influence

Connected
Leadership in
Teams



The Base of A Classic Strategy Pyramid

Purpose - The 'Why'



VISION

....

MISSION

Empowering people to innovate and invest for a better future

'ROCKS' / KEY PRIORITIES

STRATEGIES

RESULTS

VALUES + PRINCIPLES

Opportunity | Accountability | Integrity

This team...



What Google Learned From Its Quest to Build the Perfect Team

New research reveals surprising truths about why some work groups thrive and others falter.

Google researchers sought to discover the secrets of effective teams at Google.

Code-named Project Aristotle - a tribute to Aristotle's quote, "the whole is greater than the sum of its parts" - with goal to answer:

“What makes a team effective at Google?”

After looking at over a hundred groups for more than a year, Project Aristotle researchers concluded that understanding and influencing group norms were the keys to improving Google's teams. **But which norms?**



Ginka Toegel & Jean-Louis Barsoux How To Preempt Team Conflict?

(Harvard Business Review, 2016)

- **Good conflict**...fosters respectful debate, yields superior solutions
- Bad conflict...kills productivity, stifles innovation, causes talent to underperform and leave
 - Stems from deeper?...
- **Preempt: surface how people think/act when pressure low:**
 1. Look – “first impressions”
 2. Act – “behaviors” “timekeeping” etc
 3. Speak – “humor” “manners” ”criticism”
 4. Think – “uncertainty/risk” “reliable/flexible” ”tolerate failure, risk, deviations”
 5. Feel – “emotions in workplace” “react when annoyed” etc
- Conflict preemption skills easier than conflict resolution
 - Edgar Schein phrasing: “In my world...” and “In your world...?” – valid cumulative personal experience



Values & Behaviors exercise

- Individual (<5min):
 - Think of the worst teams you been in – what made it really bad to be in them?
 - Think of all the stages of underlying team conflict (T&B): eg *visual*: first impressions, behaviors, *hear*: language, manners/humor, *think*: mindsets, beliefs, *feel*: emotions
 - What were the underlying explicit or implicit norms?
 - Write down what made these team experiences bad for you – your ‘worst’ norms



Values & Behaviors exercise

- Groups (20min):
 1. Compare notes on what makes a bad team value/norm/behavior – Come up with a Top 3-5
 2. Discuss the **inverse** of the top 3-5: what would make a team really good to work in?

Groups for Today

Group 1

Andy Page, Dan, David

Group 2

Lars, Josh, Jason

Group 3

Jen, Eng Hoe, Penghai, Aarnoud

Group 4

Mateusz, Peter, Vernon






Values & Behaviors exercise – Share-Out



- Share (5-10min)
 - What did you come up with?
 - What connection of positive values/norms/behaviors?

Top Worst	Top Best
<ol style="list-style-type: none"> 1. Lack of respect – talk over each other 2. Take not give – 3. not delivering on promises 4. Negative leadership - pitting teams against each other 5. Lack of trust – breeding toxic environment 	<ol style="list-style-type: none"> 1. Psychological Safety: Respectful, actively listen, Transparency & vulnerability 2. Accountable 3. Aware / appreciative of people's talent 4. People feel valued / important 5. [provided tools, means for success]
<ol style="list-style-type: none"> 1. Lack of purpose 2. Lack of trust 3. Lack of diversity 4. Unclear roles and responsibilities 5. Negative behavior 	<ol style="list-style-type: none"> 1. Trust 2. Accountability 3. Balance / load sharing 4. Communication 5. Diversity of skills, thoughts, backgrounds
<ol style="list-style-type: none"> 1. Dishonesty 2. Ever-shifting responsibilities 3. Lack of support 4. Intellectual dishonesty 5. Not addressing issues / bad apples 	<ol style="list-style-type: none"> 1. Intellectual honesty 2. Fluid structure / meritocracy – not stuck 3. Clear decisions: right balance of empowerment + consensus 4. Sense of humor and humanity? 5. Fair reward / realistic expectations
<ol style="list-style-type: none"> 1. Moody 2. Self-centered, selfish, worried 3. Fear and punishment – pricks / tyrant – telling not teaching 	<ol style="list-style-type: none"> 1. Nice and fun people; high character 2. FIRE – Fun Integrity Respect Energy (Effort x Attitude). Always a choice. Did you bring the FIRE today? If you did, probably was a good day (Youth Sports – no better way to observe character – King Richard) 3. Dealing with issues; good conflict






▼ **Group 1**

-  Andy- Minneapolis
-  Dan McPherson
-  David Hochberg




▼ **Group 2**

-  David & Jason
-  Peter Josh Lars & Vernon

▼ **Group 3**

-  Aarnoud van Weelderen
-  Eng Hoe Kan
-  Jennifer McSorley
-  Penghai 8615800773136
-  Penghai Wu

▼ **Group 4**

-  Mateusz Tkaczyk
-  Mateusz Tkaczyk
-  GEN.MeetingRm1(+41228187533)





Opportunity

We seek to identify opportunity and realise it for our clients, communities, partners, shareholders and our people. We start with real knowledge and skill.

We encourage innovation, ingenuity and entrepreneurial spirit.

We support our people to learn, achieve and succeed. Our success is built on this.

We value the opportunity to be part of the Macquarie team, respecting different ways of thinking and the contribution of others.

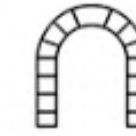


Accountability

With opportunity, comes accountability.

We are accountable for all our actions, to our stakeholders and to each other. We do not compromise our standards.

We take responsibility for our actions and everything we say and do is on the record. We analyse and manage risk, and we make decisions we are proud of.



Integrity

We act honestly and fairly. We honour our promises.

We earn the trust of our stakeholders through the quality of our work and our high ethical standards.

We have the courage to speak up when we make a mistake or see something that doesn't seem right.



The Base of A Classic Strategy Pyramid

Purpose - The 'Why'



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RESULTS

VALUES + PRINCIPLES

Opportunity | Accountability | Integrity

This team...



Key Takeaways from the Research

- How teams **treat one another** the differentiator (data not qualitative)
- **Psychological safety**: interpersonal trust and mutual respect in which people are comfortable being themselves
- Increased social perception - **more often found in women**)

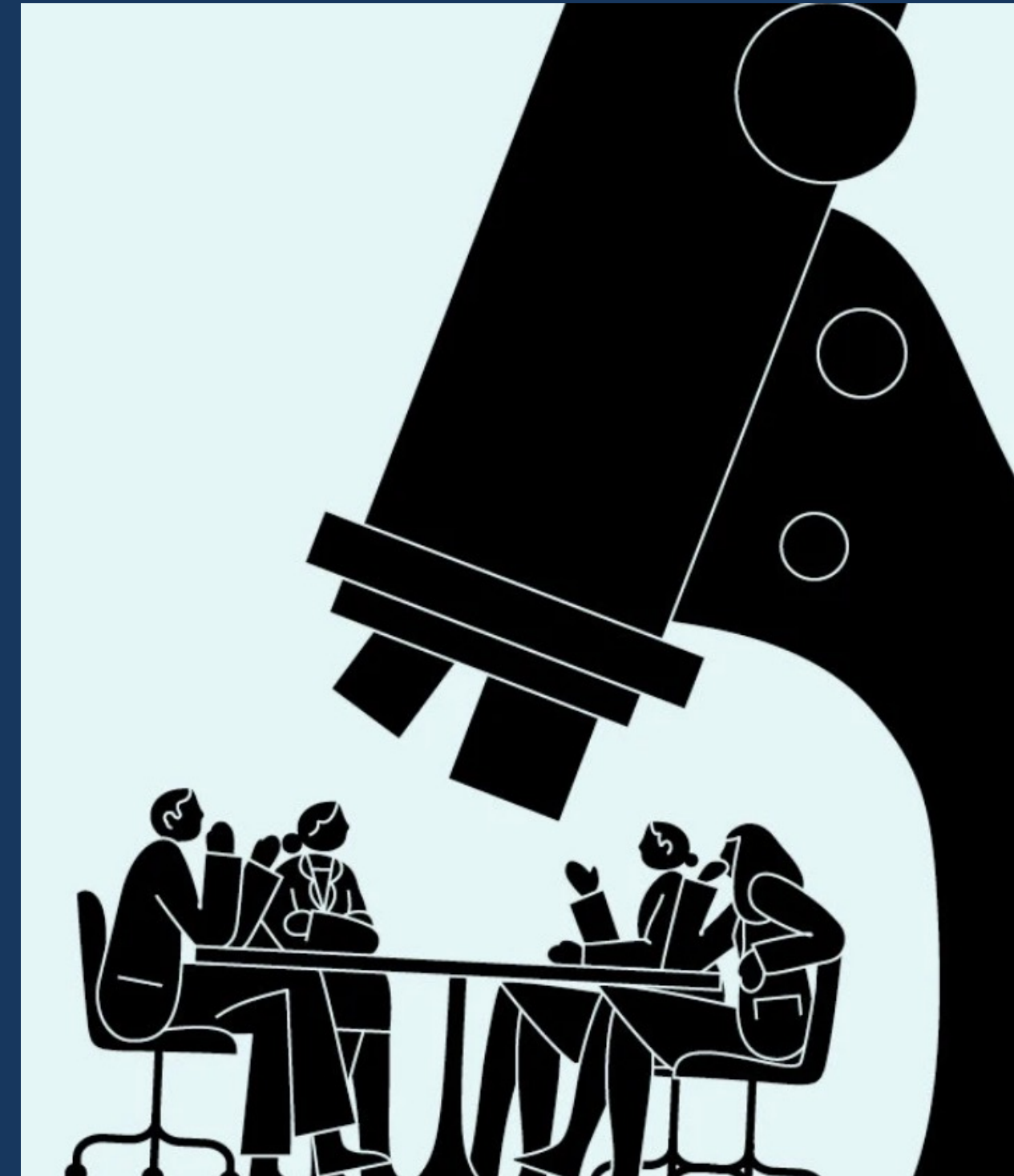


Charles Duhigg

(NYTimes Magazine, 2016)

What Google Learned From Its Quest To Build The Perfect Team

- 2012 – Project Aristotle – **data driven**
- Understanding and influencing group norms were the key
- What distinguished the “good” teams from the dysfunctional groups was **how teammates treated one another**
- Psychological safety is “a sense of confidence that the team will not embarrass, reject or punish someone for speaking up,” Edmondson wrote in a study published in 1999. “It describes a team climate characterized by interpersonal trust and mutual respect in which people are comfortable being themselves.”
- creates a safe space for you to take risks
- Story of Matt Sakaguchi at Google (Stage IV) – **Psychological safety and emotional conversations – turn-taking and empathy**



Anita Woolley et al (Science, 2010 + HBR, 2011& 2013)

Evidence for Collective Intelligence Factor in Performance of Human Groups



- “The critical factor appears to be social perception.”
- “It’s just that part of that finding can be explained by differences in social sensitivity, which we found is also important to group performance. Many studies have shown that women tend to score higher on tests of social sensitivity than men do.
- So what is **really important is to have people who are high in social sensitivity**, whether they are men or women.”
- “What do you hear about great groups? Not that the members are all really smart but that **they listen to each other. They share criticism constructively. They have open minds.** They’re not autocratic.”



PURPOSE MAPPING

Connecting my Why with Firm Why:
Team Mission

NAME
DATE

**My Purpose
& Values**

**Team Purpose
& Values**

Macquarie Purpose and Principles

Our Purpose

Empowering people to innovate and invest for a better future.

Our Principles

MACQUARIE



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Leader



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Values, Norms,
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How you engage
Listening +
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2 more 2x2s:
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Active Listening



125

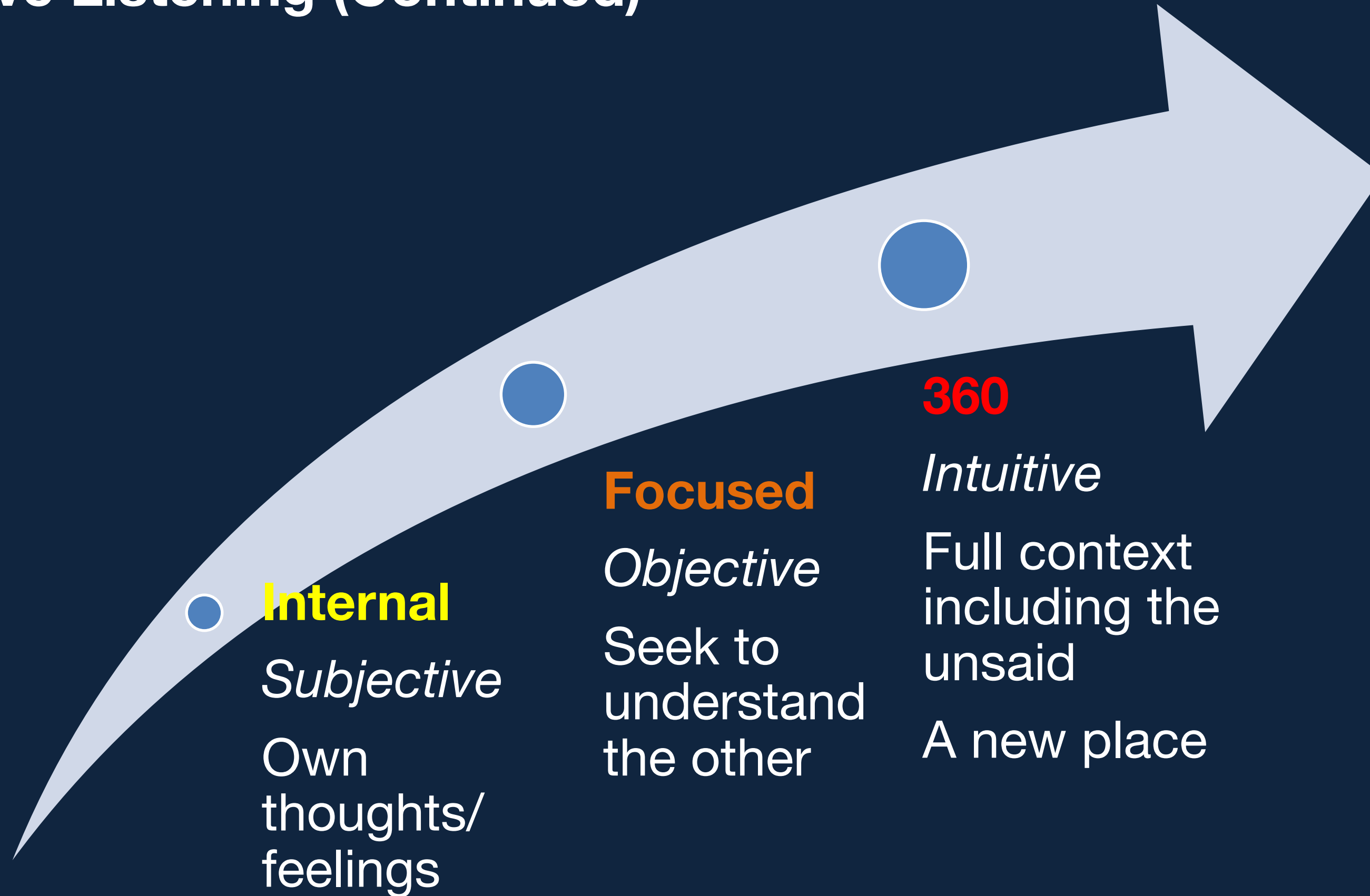


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Image: Kris Wongsuphasat @ medium

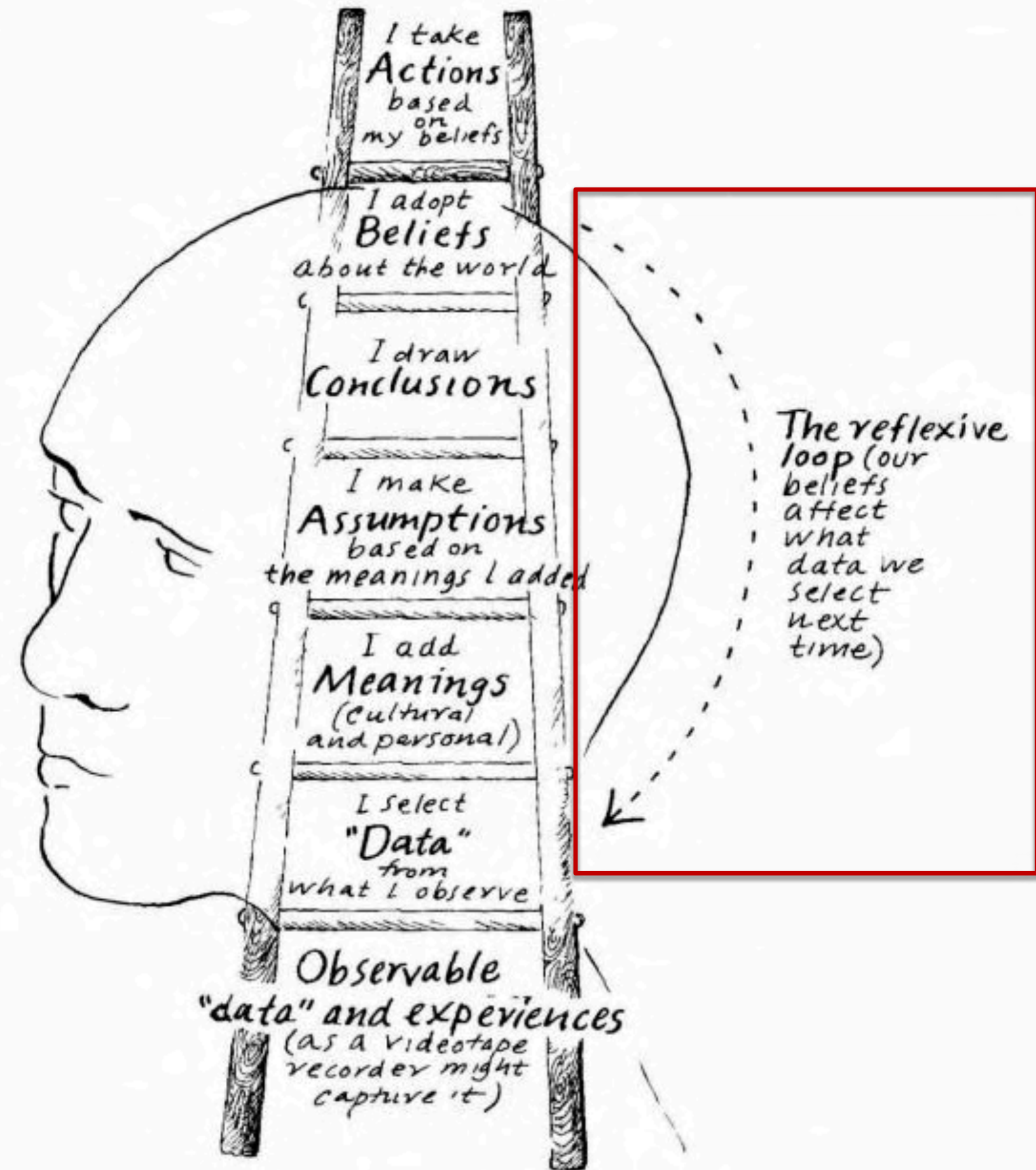


Active Listening (Continued)



The Ladder of Inference

From Argyris, C., 'Overcoming Organizational Defenses: Facilitating Organizational Learning,' 1st Edition, © 1990.



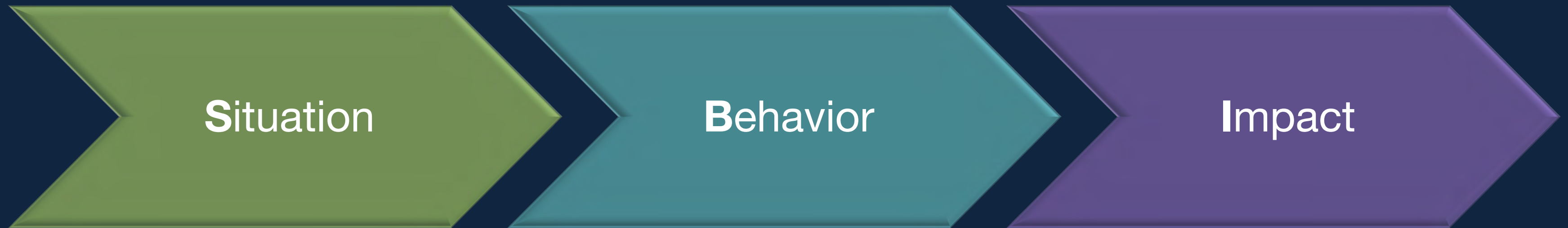


Using The Ladder Of Inference Carefully and Constructively

- **Reflection**
 - Try to suspend judgment
 - Become more aware of your own thinking and broaden your observations
- **Inquiry**
 - Inquire into other's thinking and reasoning
 - Ask open-ended questions that seek clarification
- **Advocacy**
 - Make your thinking and reasoning visible to others by describing what influenced your thinking and your actions



Feedback



Context clear

The power of a **shared goal**

What you saw / heard – senses

Don't assume more than the behavior: Stay low on the ladder!

Effect on you, those around you

The power of **how you felt**

Can you '**Feedforward**' not just Feedback?
Imagine... [similar situation] , [different behavior] , [very different result]





Thermometer AND Thermostat

*In the moment...
...& plan ahead*

Consider Energy + Hijacks



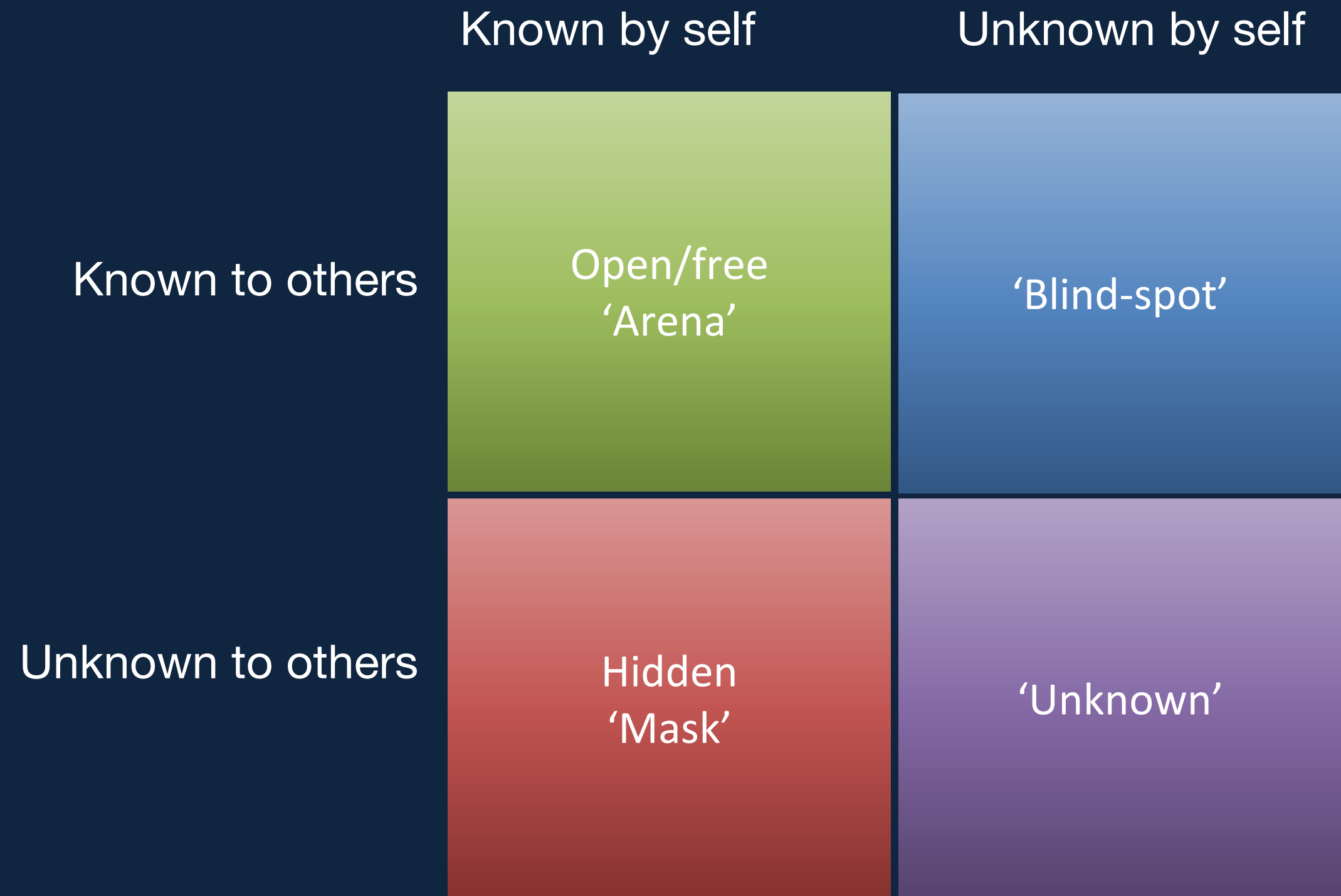


Pause and note down...

1. Internal and External-to-MCT feedback
2. Upcoming interaction to be wary of thermostat



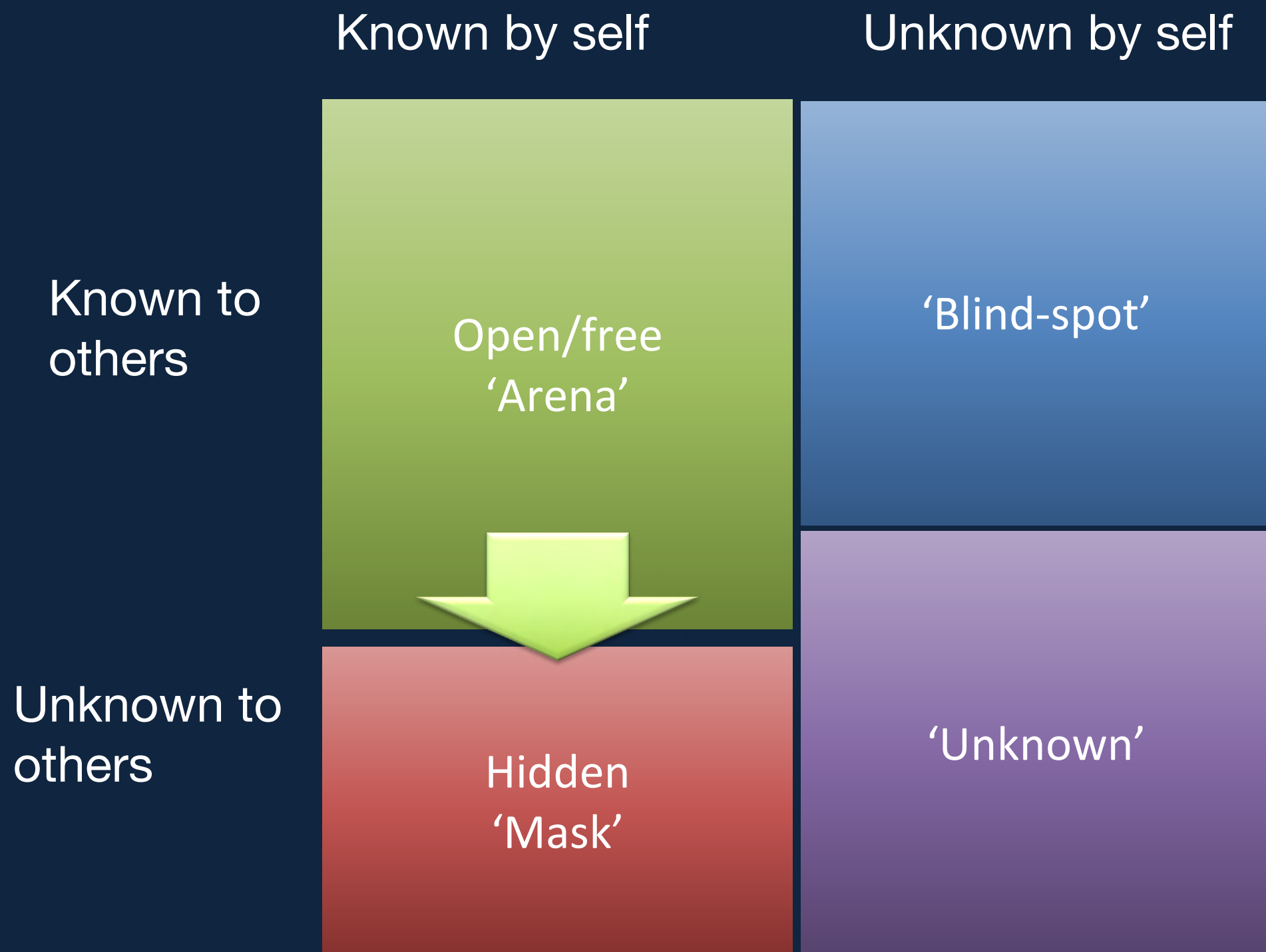
The Johari Window – The Power & Difficulty of The Journey So Far?



Source: Joseph Luft and Harrington Ingham (1955)
Luft, J. (1969). *Of human interaction*. National Press



The Johari Window – The Power & Difficulty of The Journey So Far?



Why this might be good?

- Team understands me
- Friends/Colleagues

What facilitates this?

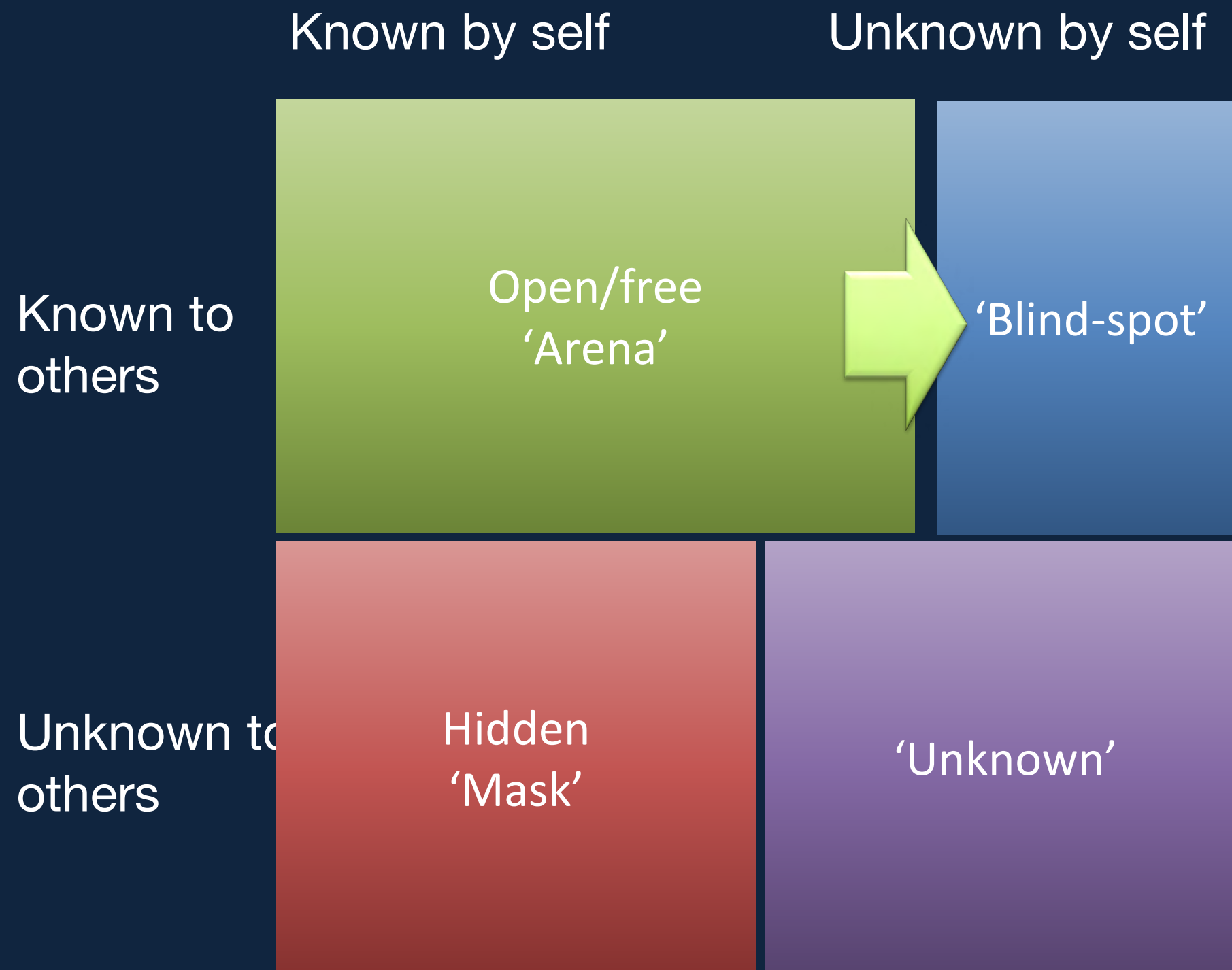
- Disclosure
- Lifemaps
- 'Share' here and in more generally
- ?...

What makes this hard?

- Privacy, cultural norms
- Others being 'too free' or 'too closed'
- ?...



The Johari Window – The Power & Difficulty of The Journey So Far?



Why might this be good?

- Learning & self-improvement

What facilitates?

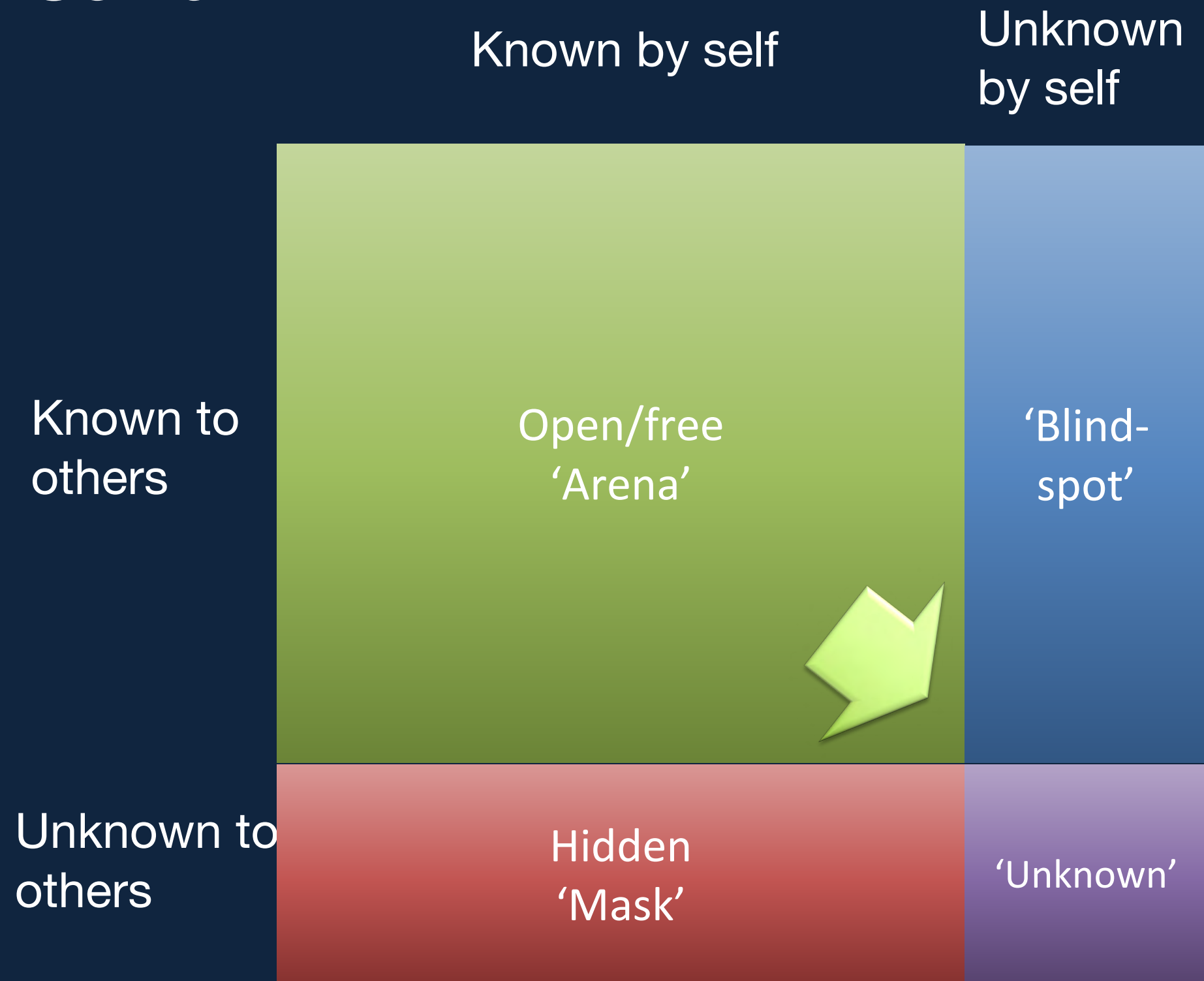
- Learning + Reflection on new Experience
- Feedback
- *VIA Character* + other personality tests
- ***Implicit Bias test***

What makes it hard?

- Lack of reflection
- Lack of feedback



The Johari Window – The Power & Difficulty of The Journey So Far?



Why might this be good for teams?

- High functioning team with high EI
- Getting best out of each other

What can make this better / easier?

- Common disclosure (From 'Life-Map' to 'Rocks' to 'User Manuals')
- Shared discovery
- Helpful observations to/from others
- Learning in a group with strong norms

What can make this harder?

- Different views / practices on privacy on disclosure and feedback
- Norms not shared



The Power of Purpose-Driven Teams...

Connected
Leader



*How You Show
Up*
Values, Norms,
Principles

How you engage
Listening +
Feedback
Your 'Arena'

*How You Tailor
Approach*
2 more 2x2s:
Skill-Will +
Stakeholder
Influence

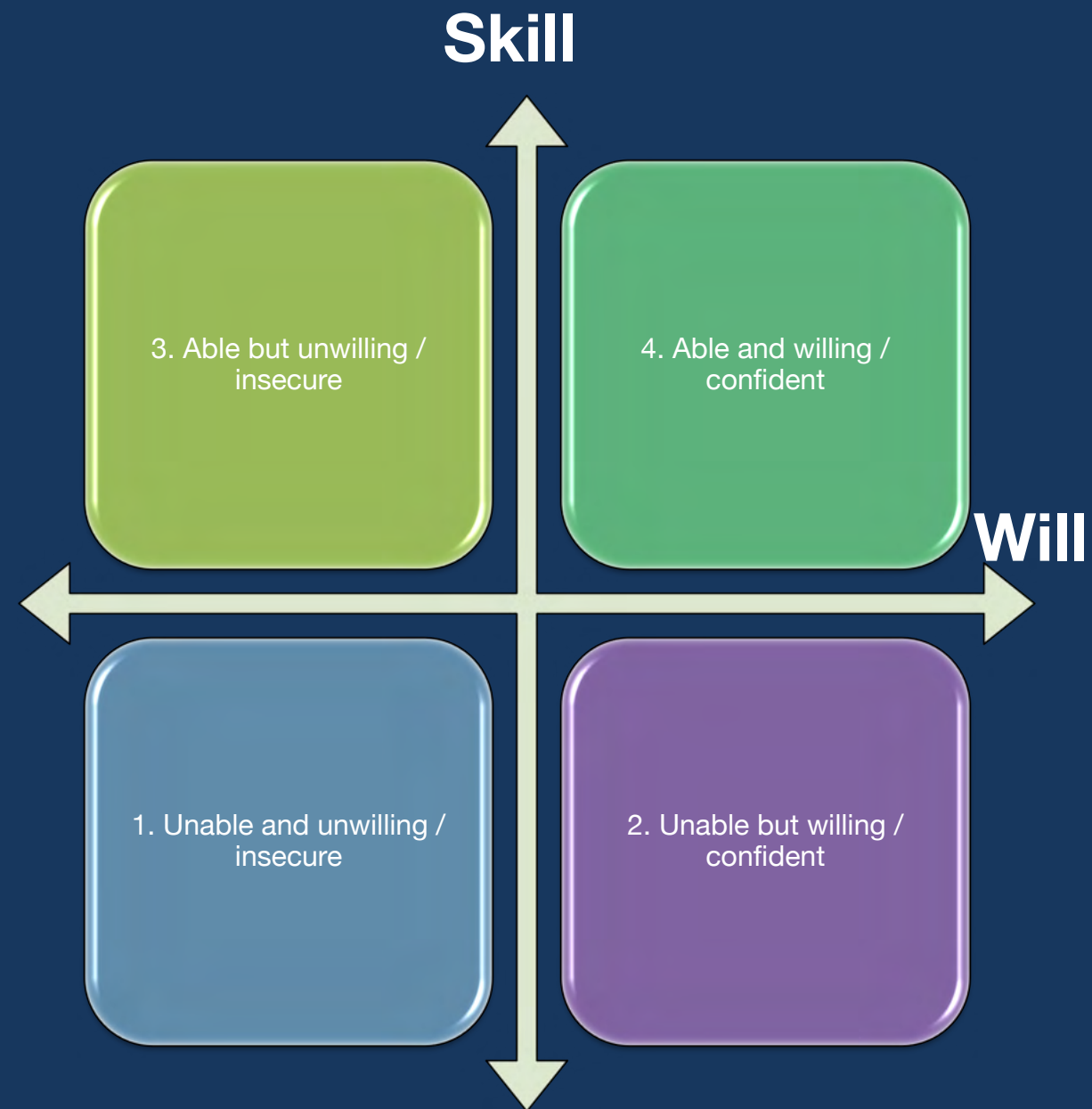
Connected
Leadership in
Teams



TEAM & CONTRACTORS

Max Landsberg*
Skill Will Matrix

The Tao of Coaching, 1996 [Derived from Hersey & Blanchard, 1977]



* The first McKinsey partner to interview me in London office when I graduated!

TEAM & CONTRACTORS

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Skill-Will - From Matrix to Table; Concept to Action

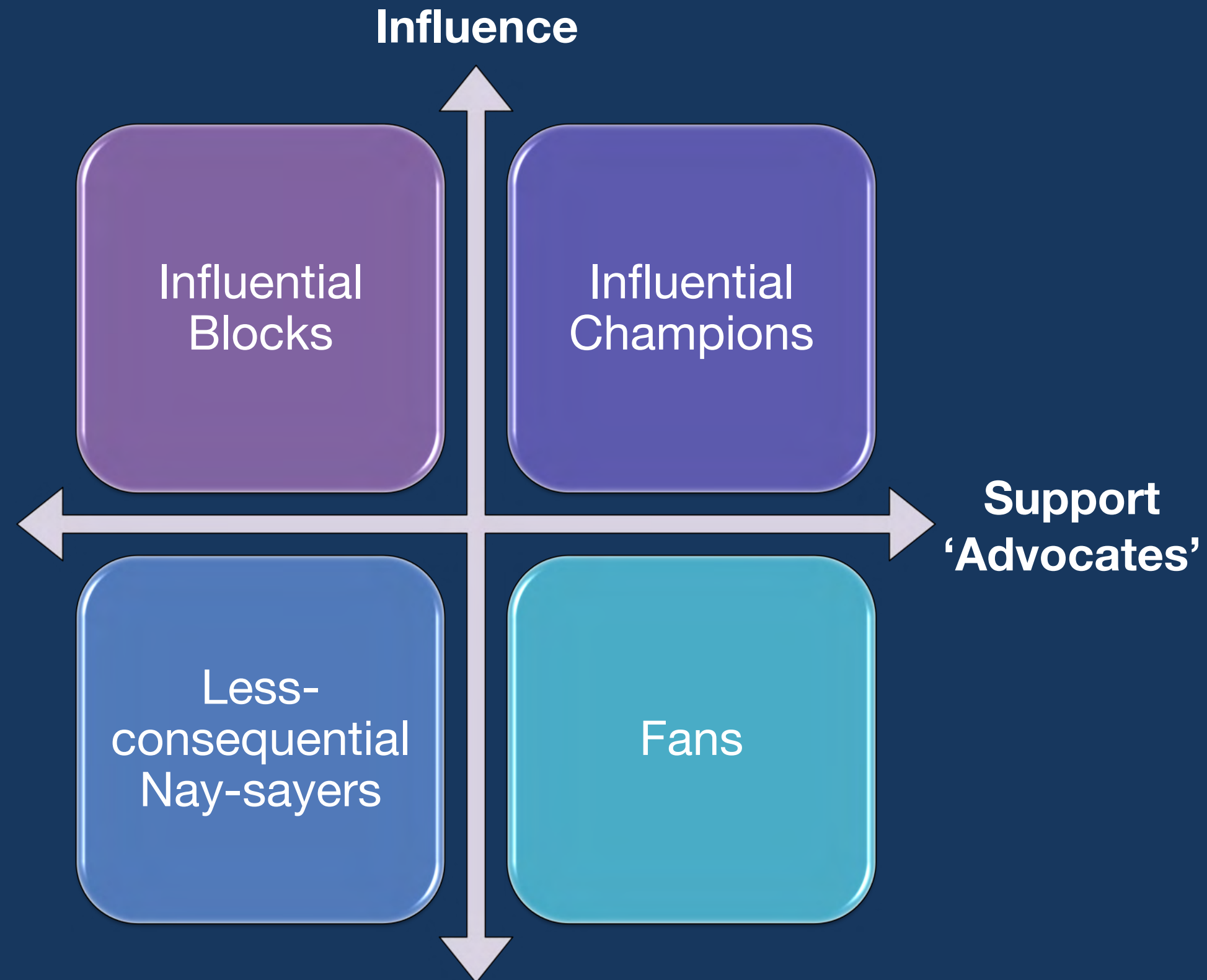
Name	Action Quadrant / Score	Notes	Action Plan



STAKEHOLDERS

Jeston & Nalis

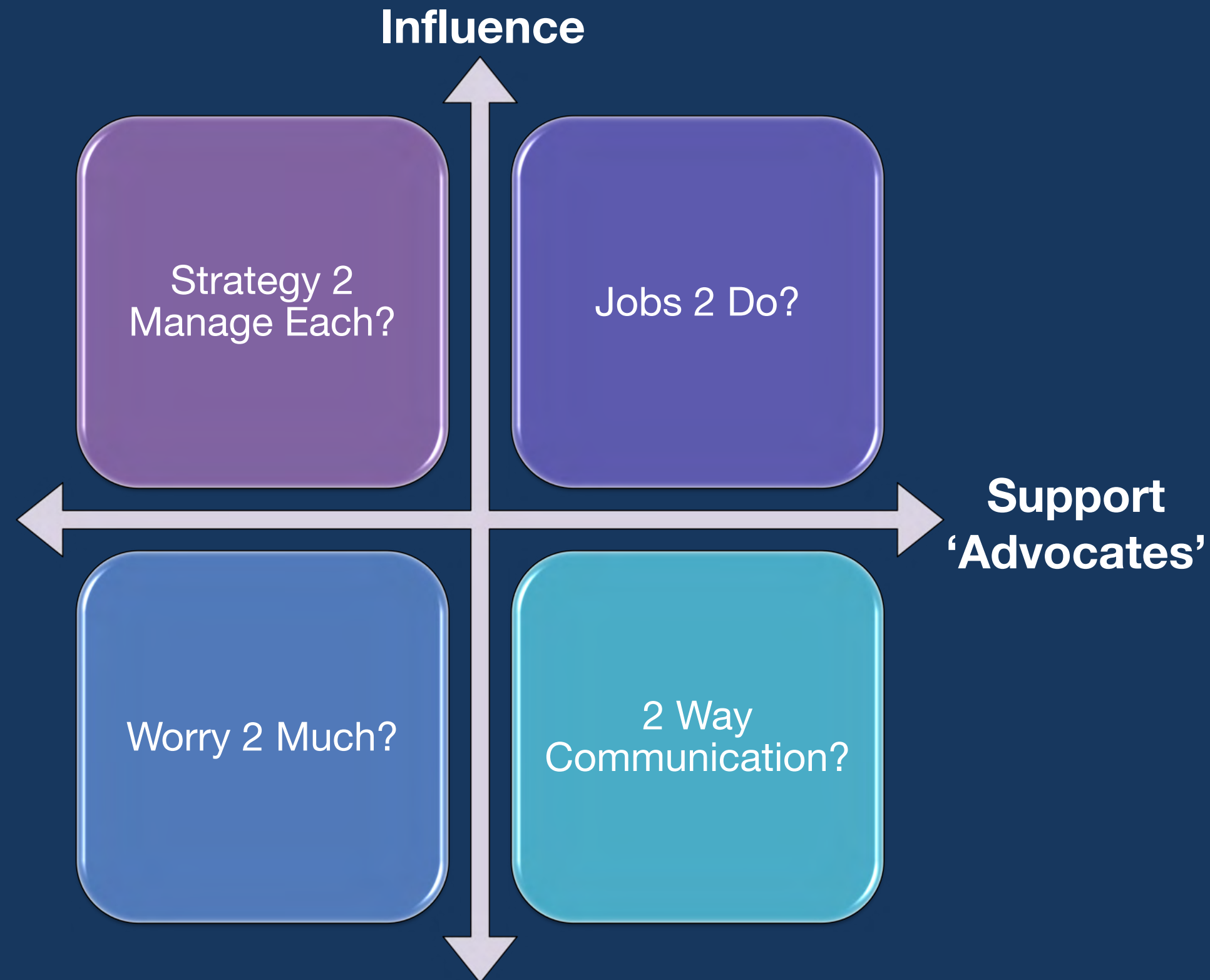
Built from Various similar matrices – eg stakeholdermap.com/stakeholder-matrix.html



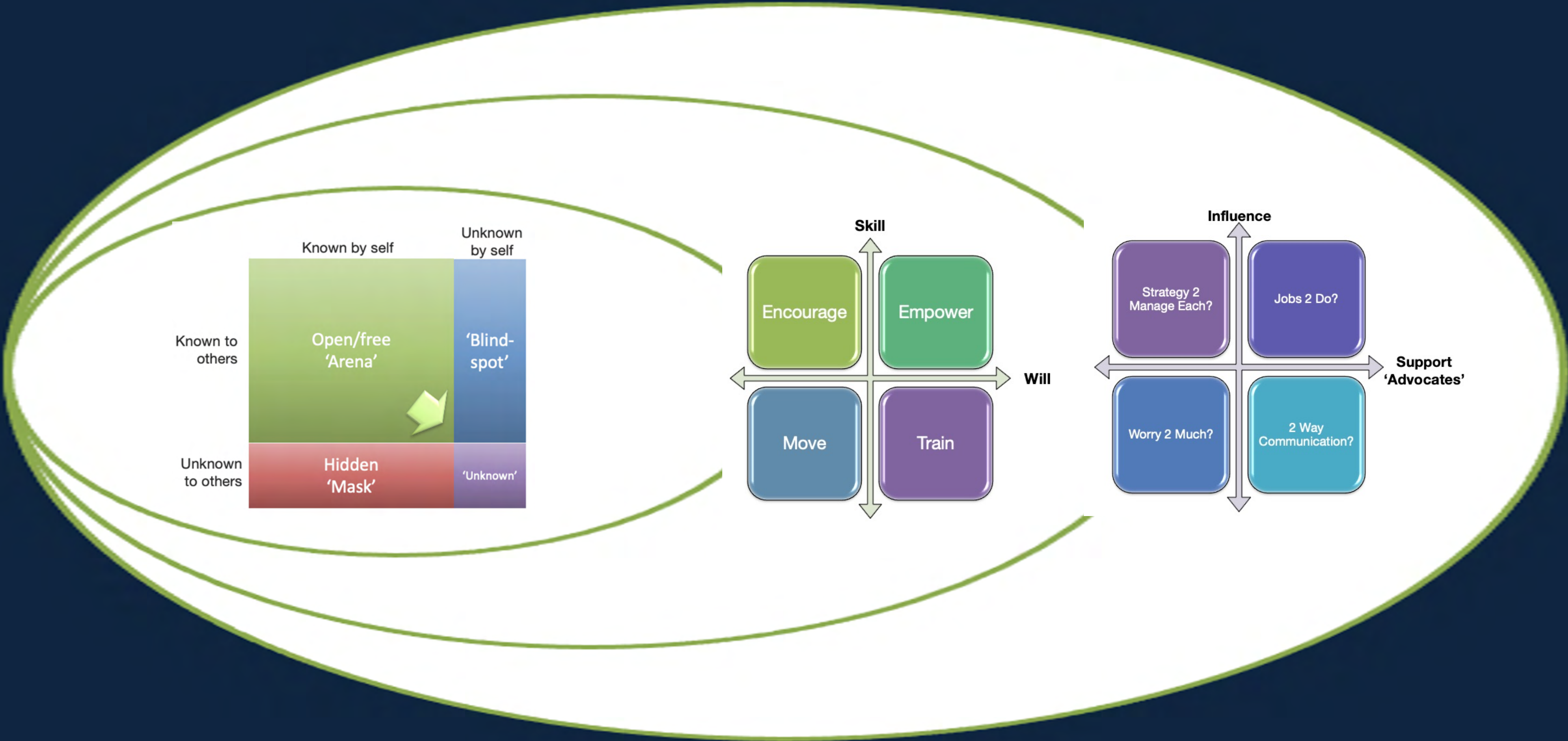
STAKEHOLDERS - CONSIDER ACTION PLAN

Jeston & Nalis

Built from Various similar matrices – eg stakeholdermap.com/stakeholder-matrix.html



Maximizing Team Effectiveness – Inner to Outward



Thank You Again!...

Connected
Leader



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December 9th 2021



**Thank you again for your
engagement!**

InspireCorps | Jen Grace Baron, Peter Boyd, Gabi Joyce, Katie Giasullo



APPENDIX

Pre-work for next time

1. Fine-tune Team Values (David with help) – each with their own sheet?
2. Pick Skill Will or Stakeholder matrix v1.0
3. Pick a meeting/moment to apply a tool of your choice
4. Chat with your buddy (and a buddy outside?)



PURPOSE MAPPING

Connecting my Why with Firm Why:
Team Mission

NAME
DATE

**My Purpose
& Values**

**Team Purpose
& Values**

Macquarie Purpose and Principles

Our Purpose
Empowering people to innovate and invest for a better future.

Our Principles

The screenshot shows the Macquarie website header with the logo and navigation icons. Below the header, three columns of content are visible:

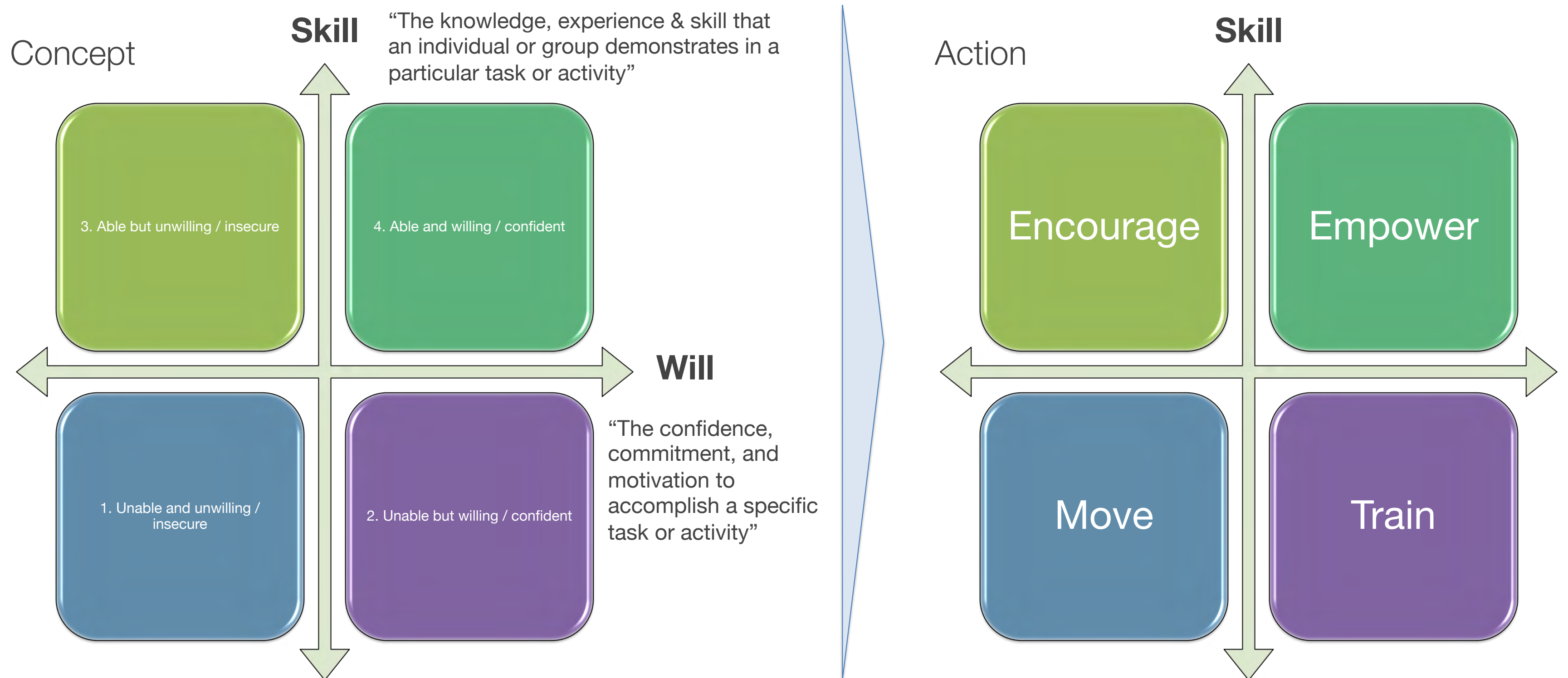
- Opportunity:** We seek to identify opportunity and realise it for our clients, communities, partners, shareholders and our people. We start with real knowledge and skill. We encourage innovation, ingenuity and entrepreneurial spirit. We support our people to learn, achieve and succeed. Our success is built on this. We value the opportunity to be part of the Macquarie team, respecting different ways of thinking and the contribution of others.
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TEAM & CONTRACTORS

Max Landsberg*
Skill Will Matrix

The Tao of Coaching, 1996 [Derived from Hersey & Blanchard, 1977]



* The first McKinsey partner to interview me in London office when I graduated!

TEAM SKILL-WILL MATRIX



[Please feel free to use the text table or create individual shapes for names and move them around free-hand]

[name]



TEAM SKILL-WILL MATRIX-AS-TABLE

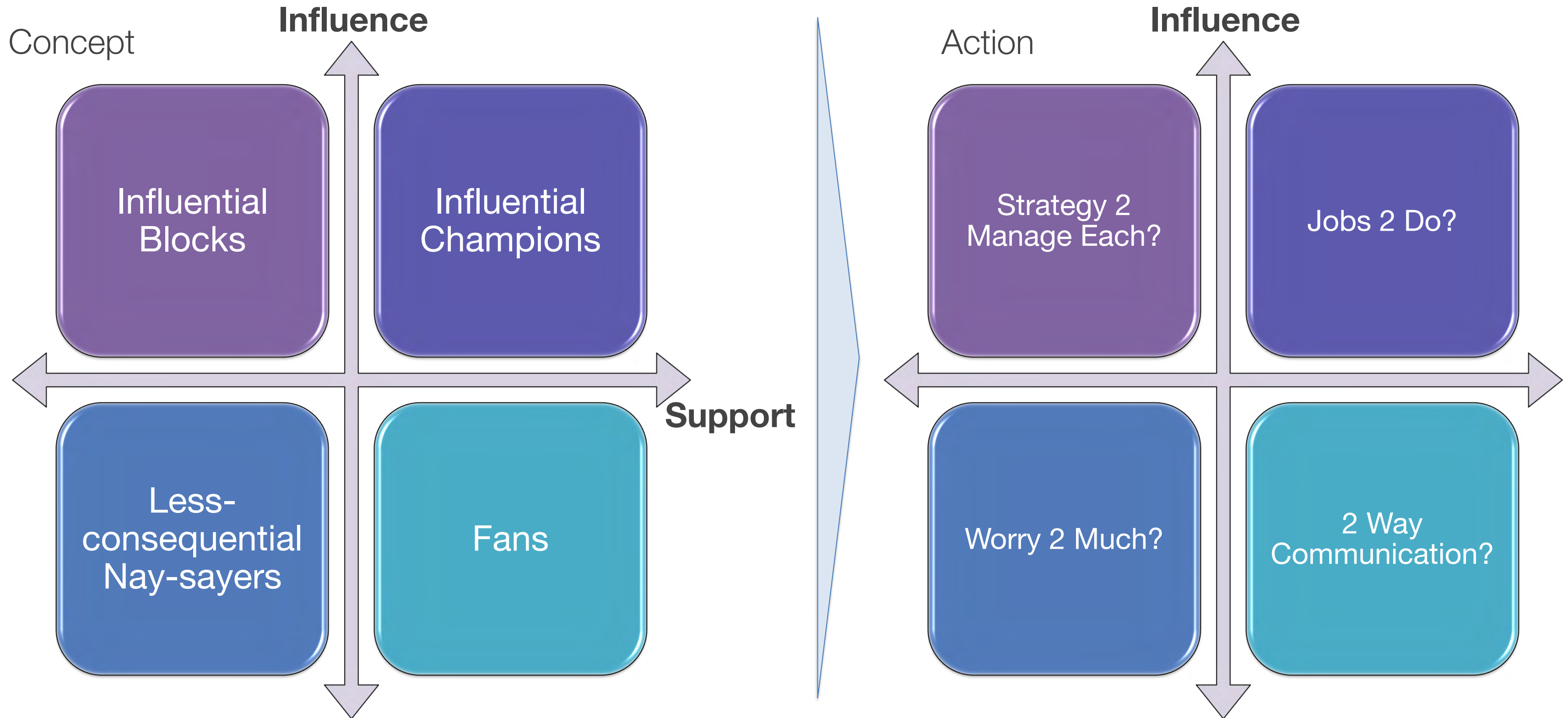
Name	Action Quadrant / Score	Notes	Action Plan



STAKEHOLDERS

Jeston & Nalis

Built from Various similar matrices – eg stakeholdermap.com/stakeholder-matrix.html



STAKEHOLDER MATRIX

Influence



[Please feel free to use the text table or create individual shapes for stakeholders and move them around free-hand]

[name]



STAKEHOLDER MATRIX-AS-TABLE

Stakeholder	Quadrant / Score	Notes	Action Plan



PARTICIPANTS



Name	Team / Function
David Hochberg	
Andy Page	LDRV Lead
Dan McPherson	Gasoline Lead
Jason Volz	Crude Lead
Josh Bothager	Distillates Lead
Eng Hoe Kan	LPG/PETC Lead
Penghai Wu	Asia Lead
Peter Taylor	Geneva Office Head / EMEA Bus Dev Lead
Aarnoud van Weelderin	America's Bus Dev Lead
Jennifer McSorley	America's Operations Lead
Vannan VR	EMEA/Asia Operations Lead
Lars Pohjola ??	LDRV #2 & Senior Leader in MCT

Meredith as observer / partner

Name	Team / Function
Jen Grace Baron	Co-CEO & Growth Officer
Peter Boyd	Senior Partner
Gabi Joyce	Senior Director of Client Experience
Katie Giasullo	Team Coordinator

