

January 11<sup>th</sup> 2021



# INSPIRED, PURPOSE-DRIVEN TEAMS

Purpose-Driven, Engaged Leaders – Inside and Out



# Welcome Back!

1. **Diversity encouraged and breeds excellence:** Bring it in
2. **Inclusion & Subtleties:** everyone to feel welcome
3. **Be Kind and Be Present:** Pen and Paper - no competing screens please



# Internal timing plan



# WORKSHOP SUMMARY

## Personal Leadership

## Team Leadership

## Wider Company and System Engagement

<b>Dates</b> <i>(Suggested tbc)</i>	Thurs October 28th	Thurs Nov 4 <sup>th</sup>	Thurs November 18th	Thurs December 9 <sup>th</sup>	Thurs January 6th	Thurs January 20th
<b>Time</b>	Normally 7am CT, 8am ET, 2pm CET, 8pm Singapore, 10pm Sydney					
<b>Duration</b>	45-60min	4 x 2hr				45-60min
<b>Focus of Session</b>	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)
<b>Example Tools and Key Elements</b>	<ul style="list-style-type: none"> <li>• Intros: to people</li> <li>• Intros: to concepts</li> <li>• Norms</li> </ul>	<ul style="list-style-type: none"> <li>• Intro to Purpose-Driven Leadership: From Purpose to Performance</li> <li>• Listening skills</li> <li>• Purpose mapping and Connecting Work 'Rocks' (SharePoint)</li> </ul>	<ul style="list-style-type: none"> <li>• Reviewing PDL – Individual</li> <li>• Leader Summit</li> </ul>	<ul style="list-style-type: none"> <li>• Personal &amp; Team Values</li> <li>• Dealing with human vs market adversity: Ladder of inference, SBI Feedback</li> <li>• Influence from Full to min control: Johari, Skill-Will, Stakeholder Matrix</li> <li>• Team – Purpose, Priorities, Potential and Performance</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Shift Positive 360 results</i></li> <li>• Team influencing</li> <li>• Work on One Page as enduring tool (co-led with David H)</li> </ul>	<ul style="list-style-type: none"> <li>• Team reflections and look forward – and requests for help</li> <li>• Where has change been positive</li> <li>• Where do we still need to focus?</li> </ul>

# Check-in + Welcome

**David Hochberg**

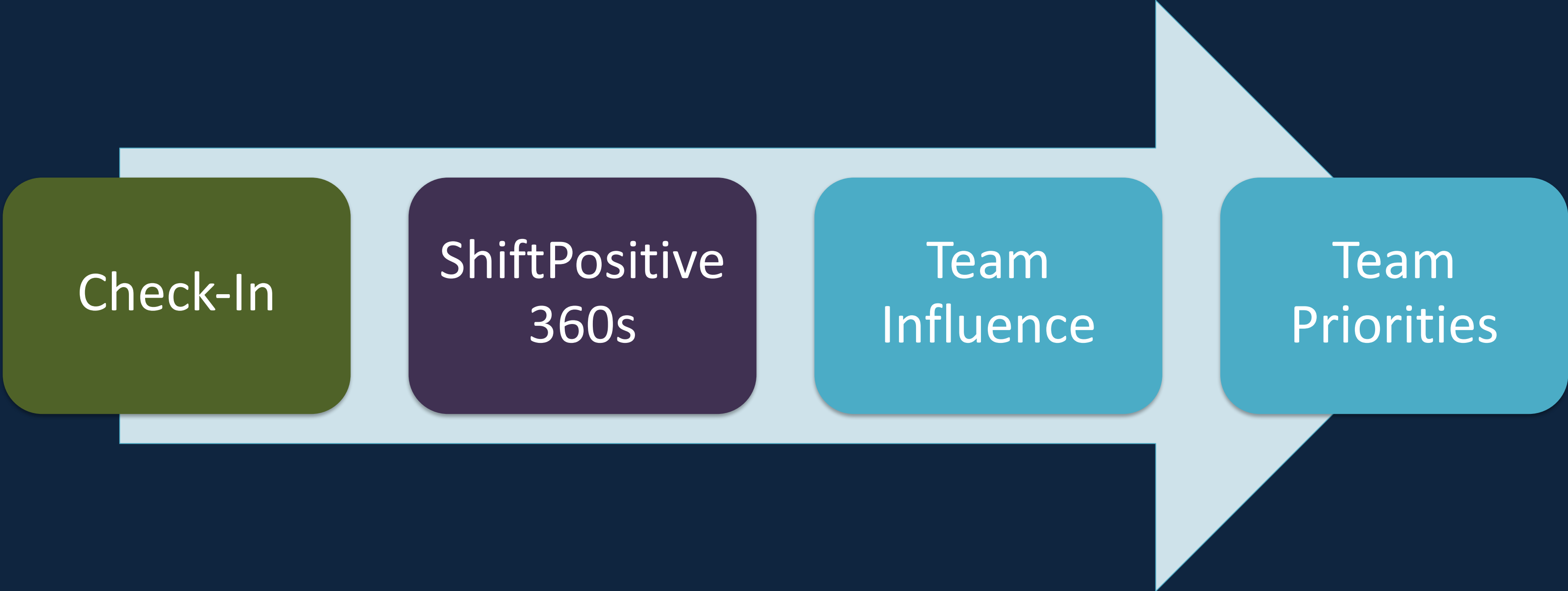


**Reset**

Jen



# Internal timing plan



# Quick Recap on the Process

Jen

## other feedback

strengths + weaknesses  
details ineffectiveness  
do less of

lacks context  
problem-focused  
past failures

one-way feedback  
closed + confidential  
lacks follow through



strengths focus  
builds on success  
do more of

specific examples  
solution-focused  
desired future

two-way support  
open + transparent  
recognizes + reinforces





# Top Themes

All



# Pairs for 15min

All

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



# Share-out

## Themes:

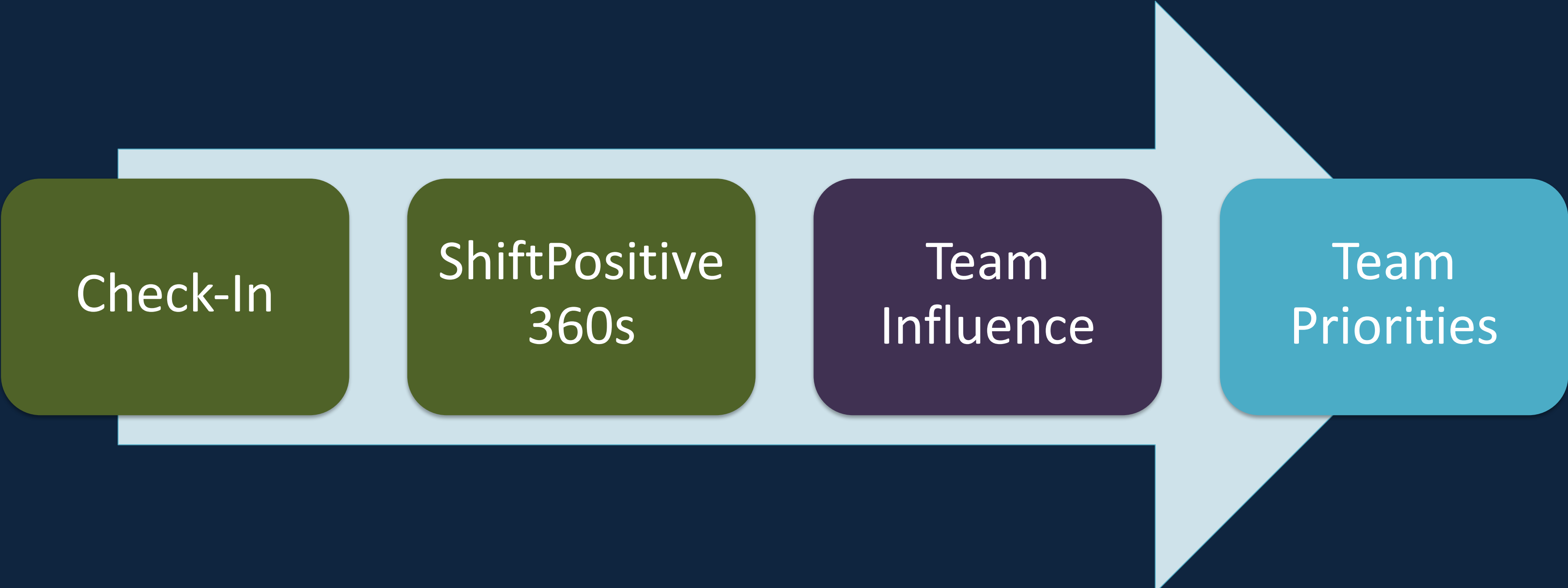
**situation agility/influencing; MCT strategy + comms;  
education + knowledge-share; connect; support**

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

- Dan: directness / say something nice / more questions. Understand the regional differences
- Peter T: “that resonates” - strategy then monetize it. Leverage comms skills + humor to connect. Career fork – support
- Josh: common theme: working across teams esp. in WFH on/off work style – harder when remote. Support/empower our reports
- Andy: agreed + opportunity to work with risk units – more awareness of what the benches want
- Vernon: not surprising/confirming – think as a wider team beyond MCT to org.
- Eng Hoe: always more room to communicate – especially strategy of MCT. Take away preconceptions – out my comfort zone (eg “physical oil” want to do more physical for sake of it, not making money)
- Jennifer: grouped ours: Trusted, influential and respected; creative, forward-thinking, growth-in-mind; knowledgeable, . People want to know what we’re up to. More knowledge sharing. Love risk-taking but hesitancy – create support group then press forward. Emotional experience – advocate for others – really good to read
- Lars: we do have culture of making money. No surprises except its positive. Want to hear more of what I have to say.
- Aarnoud: very similar to Jen. Engagemetn with the rest of the organization. Certainty and comms on where we’re going
- Mateusz: take it to the next level. Postive + focus. Don’t zap energy



# Internal timing plan



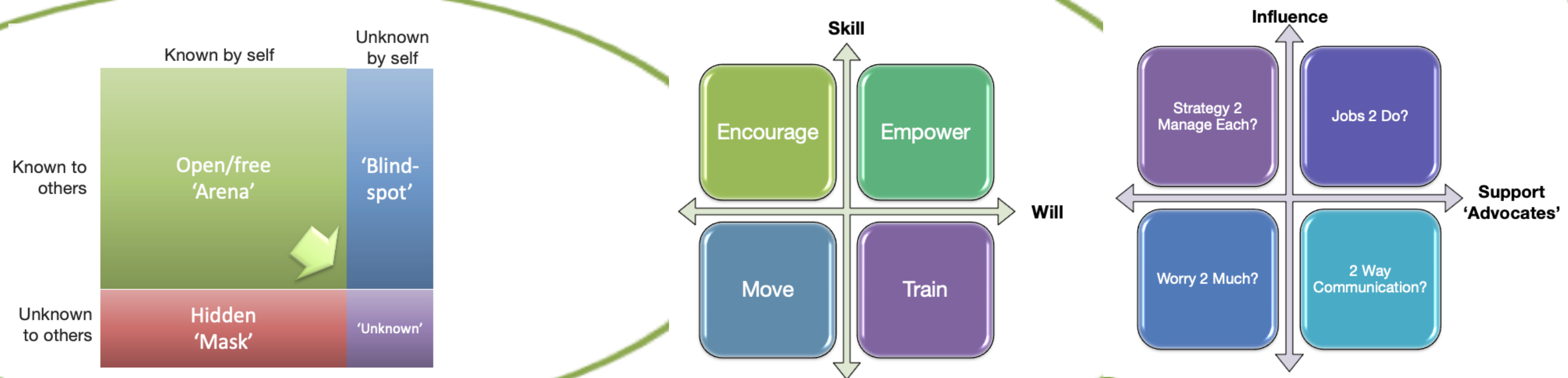
# Pre-Work?

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

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 – SBI show up in real life?
4. Chat with your buddy (and a buddy outside?)



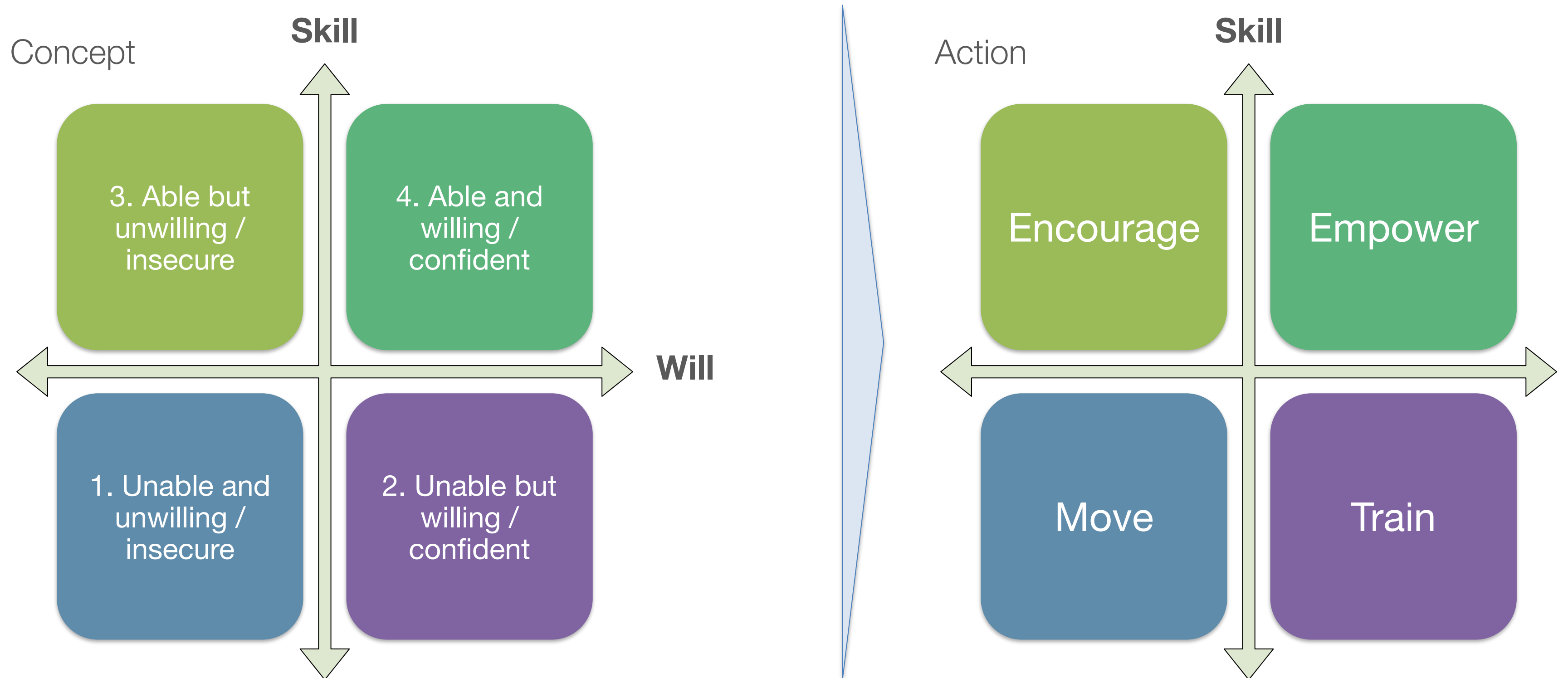
# Maximizing Team Effectiveness – Inner to Outward



# TEAM & CONTRACTORS

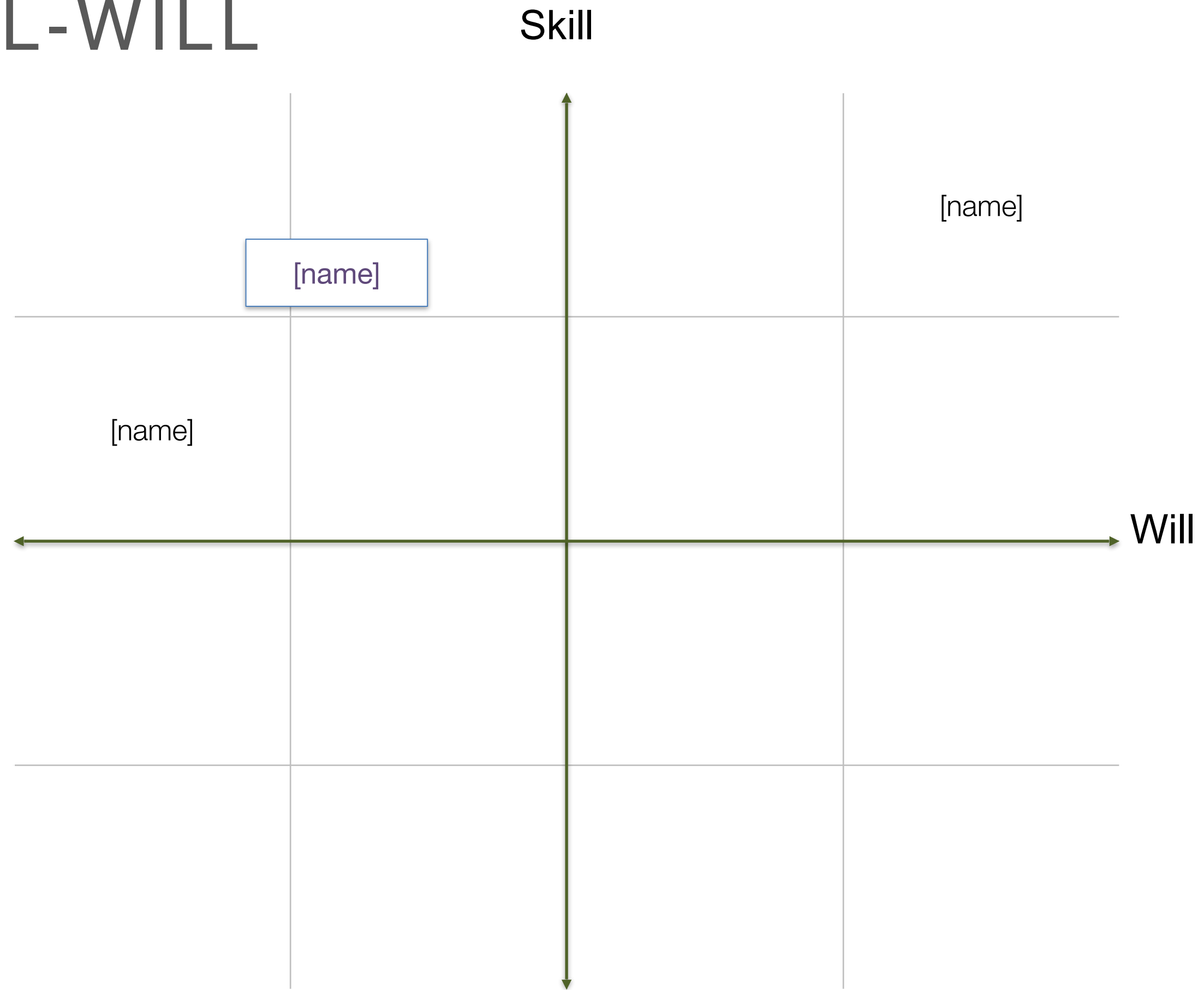
**Max Landsberg\***  
Skill Will Matrix

*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]*





# TEAM SKILL-WILL MATRIX-AS-TABLE

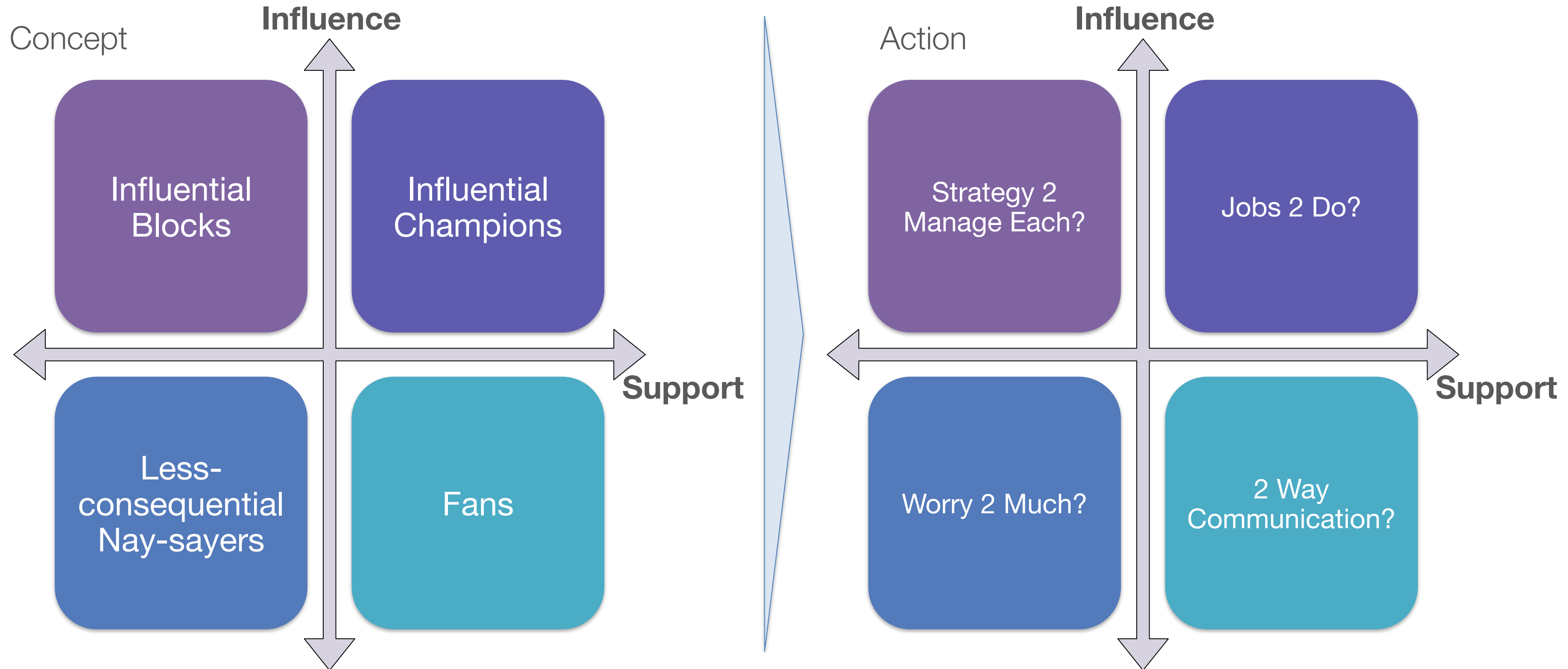
Name	Action Quadrant / Score	Notes	Action Plan



# STAKEHOLDERS

## Jeston & Nalis

*Built from Various similar matrices – eg [stakeholdermap.com/stakeholder-matrix.html](http://stakeholdermap.com/stakeholder-matrix.html)*



# STAKEHOLDER MATRIX



*[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



# Where did we get to?

Who has a version on paper / ppt / in-their-head?

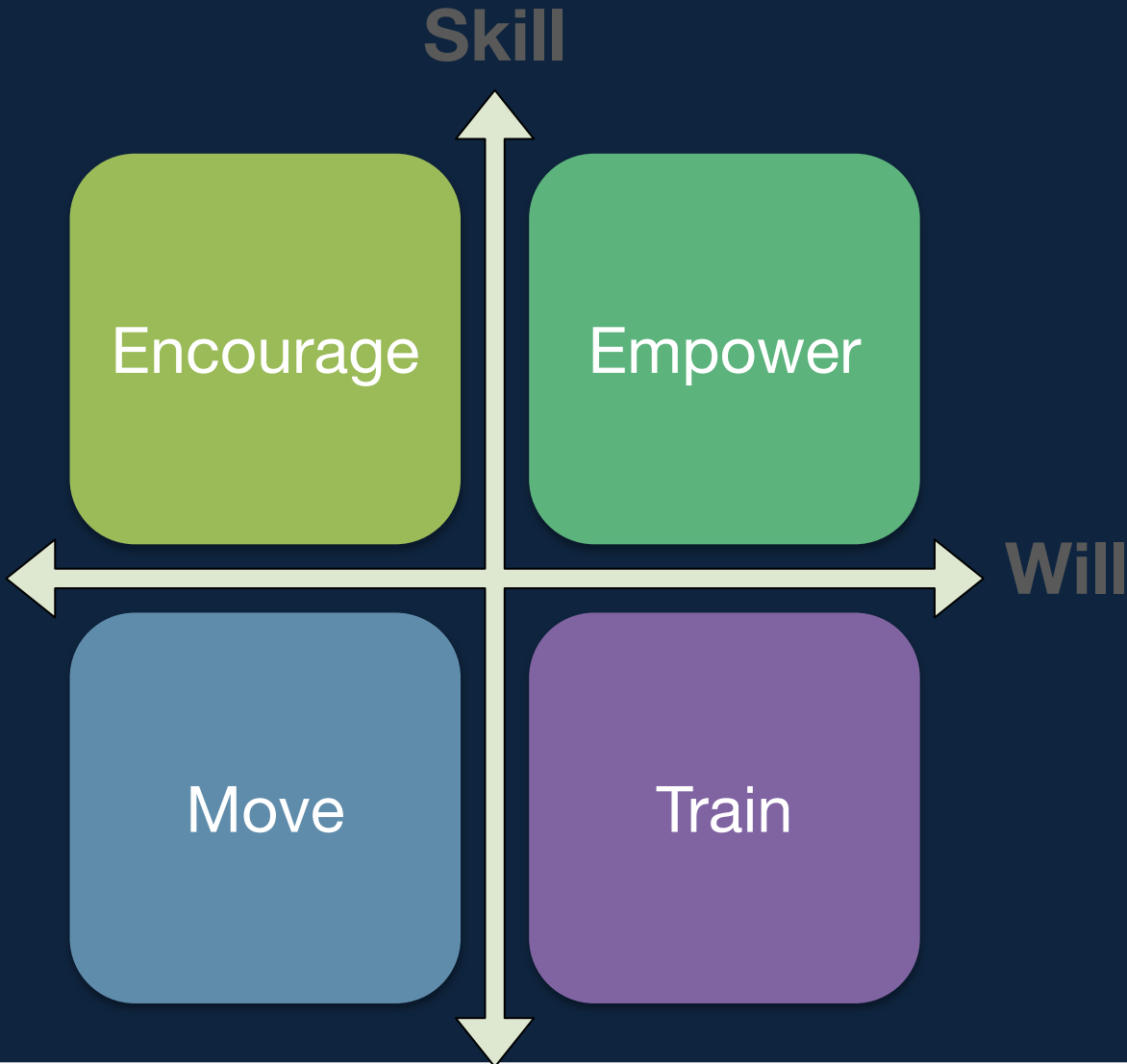
How many gravitated to Skill-Will? Stakeholder Influence?



# Groups

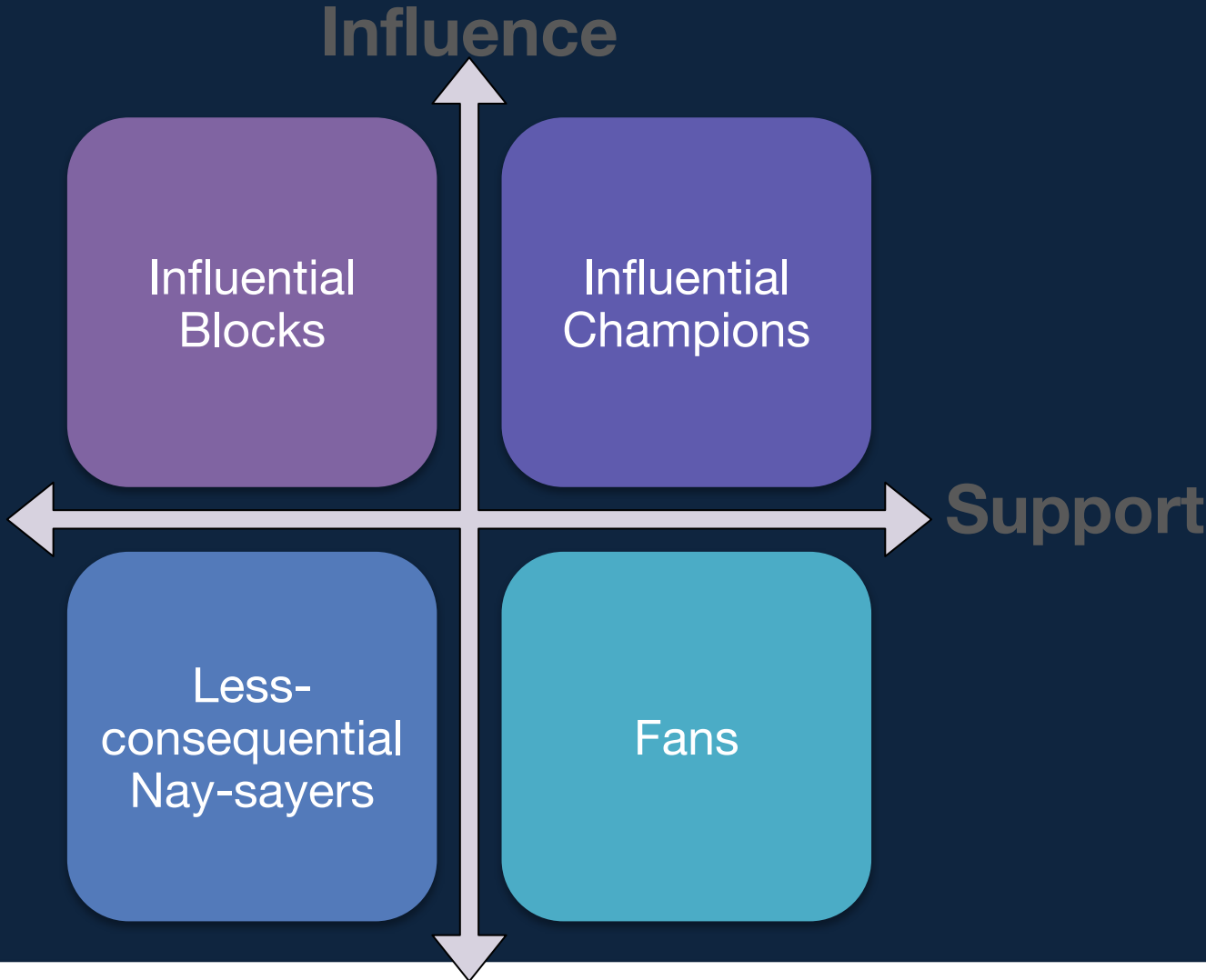
## Skill Will:

- compare notes on action plans – who is key to move?
- How do we lead in 2022?



## Stakeholders:

- common targets for better relationships? – who to move and how to move them?
- Managing the MCT brand in 2022?



# Share

Skill-Will – common themes / action plans for key team members?

Stakeholders - Common targets for better relationships?

Action plans for you / David / others?



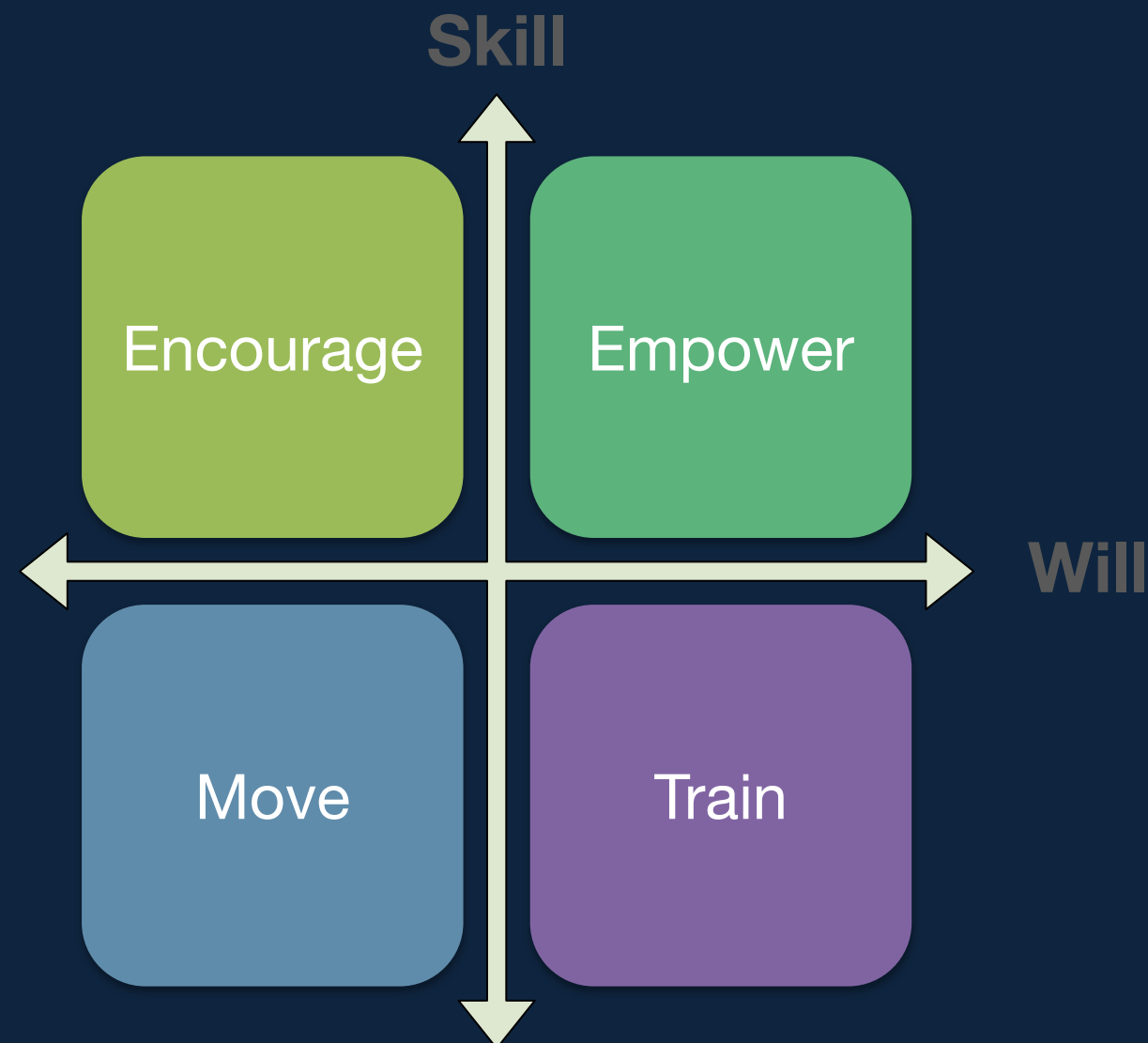
# Groups

## Skill Will:

- compare notes on action plans – who is key to move?
- How do we lead in 2022?

Team Skill Will

- Andy Page
- DM Dan McPherson
- JB Joshua Bothager
- LP Lars Pohjola
- Mateusz + Peter T



- Spent most time on key Individuals to focus on: Knowledgeable people that can flourish / grow:
- Top left /Lower right: Denara (hybrid => give her a mentor. change role/ affiliation more to DP Houston), classic lost opportunity to engage in office during COVID
- Top right: Mark D (share info wider – more of the why); Rick S (to NGL – a blind spot for the team)
- COVID effect





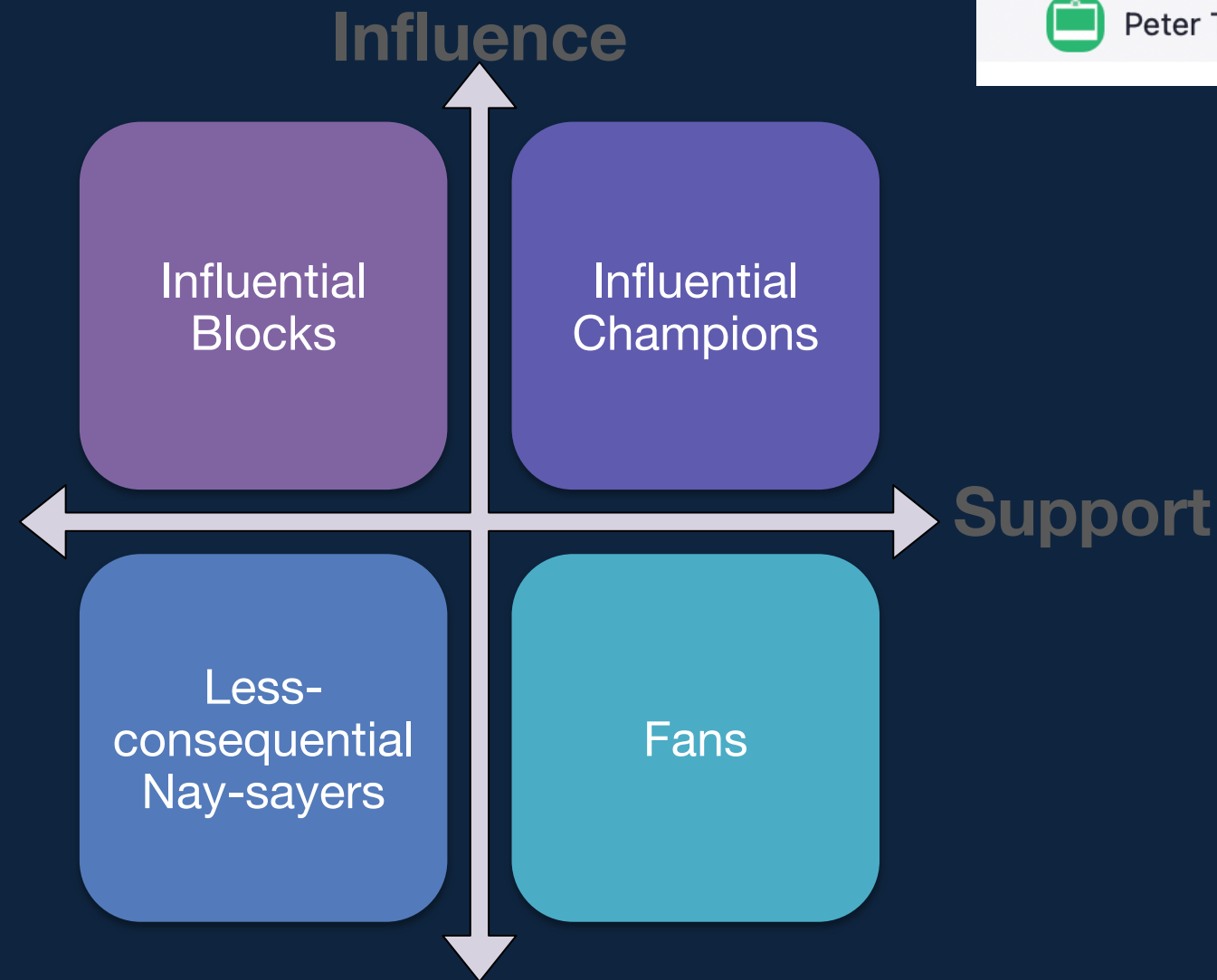
# Groups

Stakeholders:

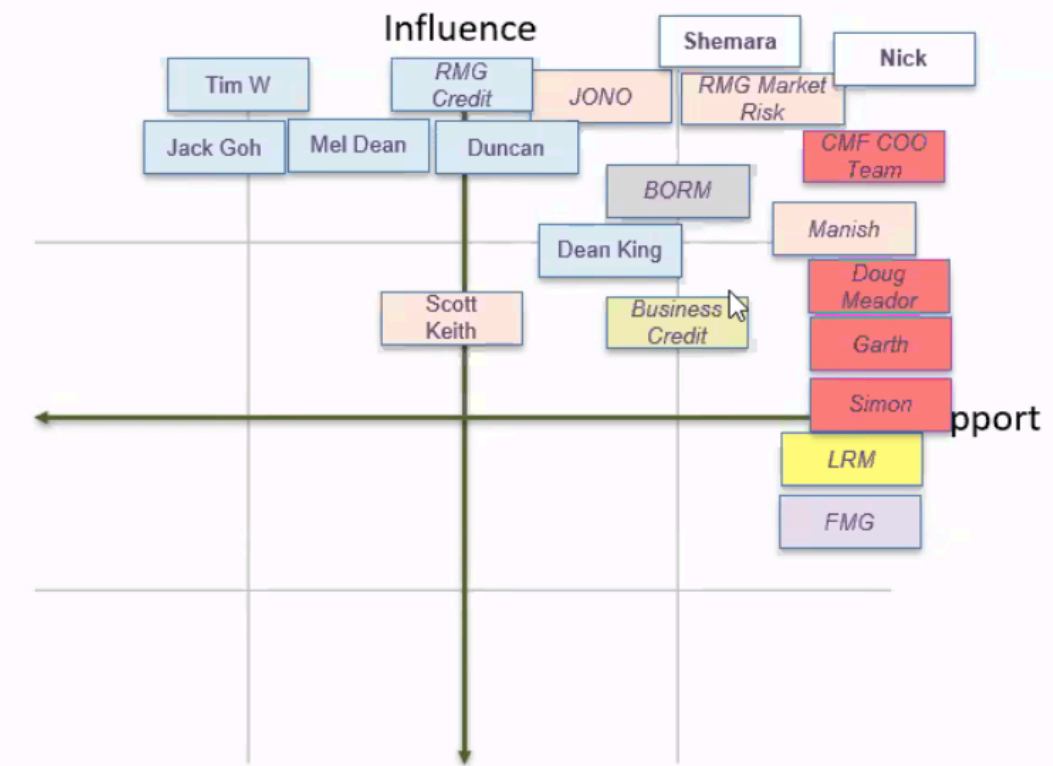
- common targets for better relationships? – who to move and how to move them?
- Managing the MCT brand in 2022?

## Stakeholder Influence

- Av Aarnoud van Weelderen
- DH David Hochberg
- EH Eng Hoe Kan
- Jennifer McSorley
- VV Vannaan V R
- Peter Taylor



## MCT TEAM STAKEHOLDER MATRIX



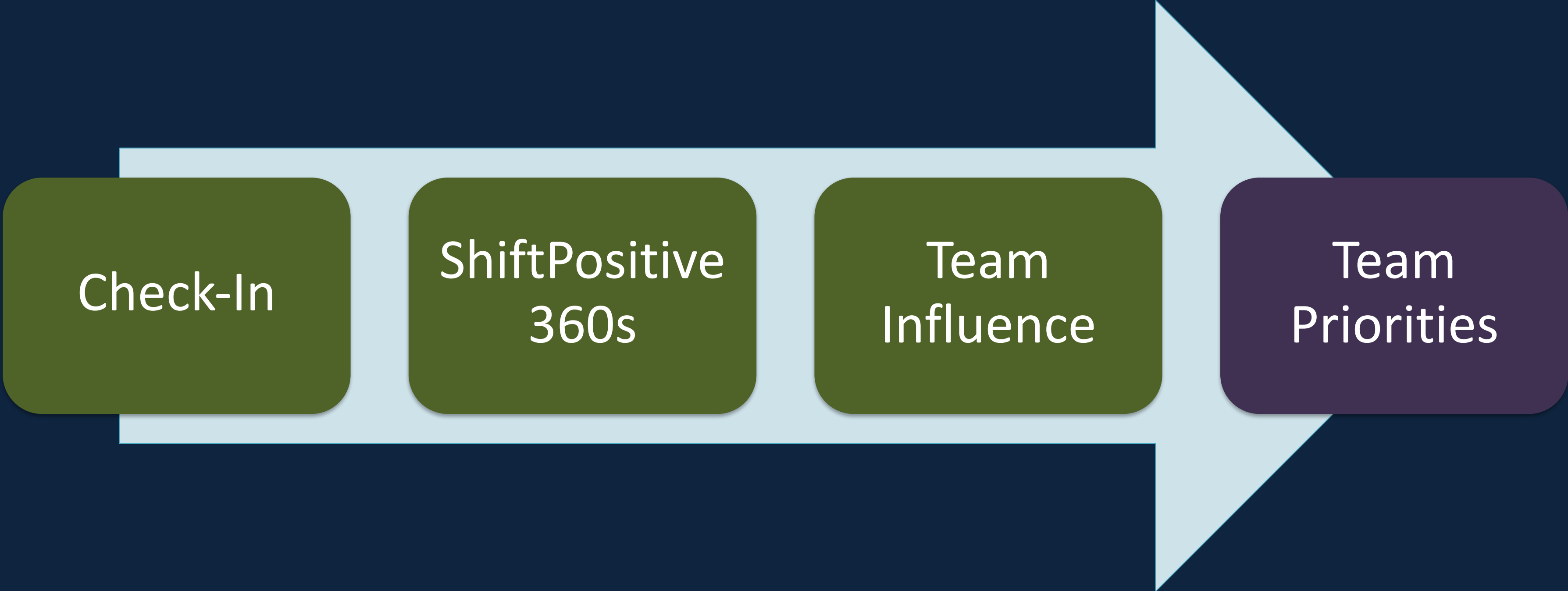
Actions:

1. Move LRM to top right
2. Work regionally to develop support with RMG Credit
3. Work globally to continue to improve our RMG Market Risk Team
4. MCT COO Team

LRM Responsive – should be more important (they are in other organizations)  
Market Risk – surprising – not always consistent across the groups



# Internal timing plan



# PURPOSE-DRIVEN, CONNECTED LEADERSHIP

## ...From Self To Team

**“Be yourself,  
only better”**



**PURPOSE**  
**PRIORITIES**  
**POTENTIAL**  
**PROGRESS**



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

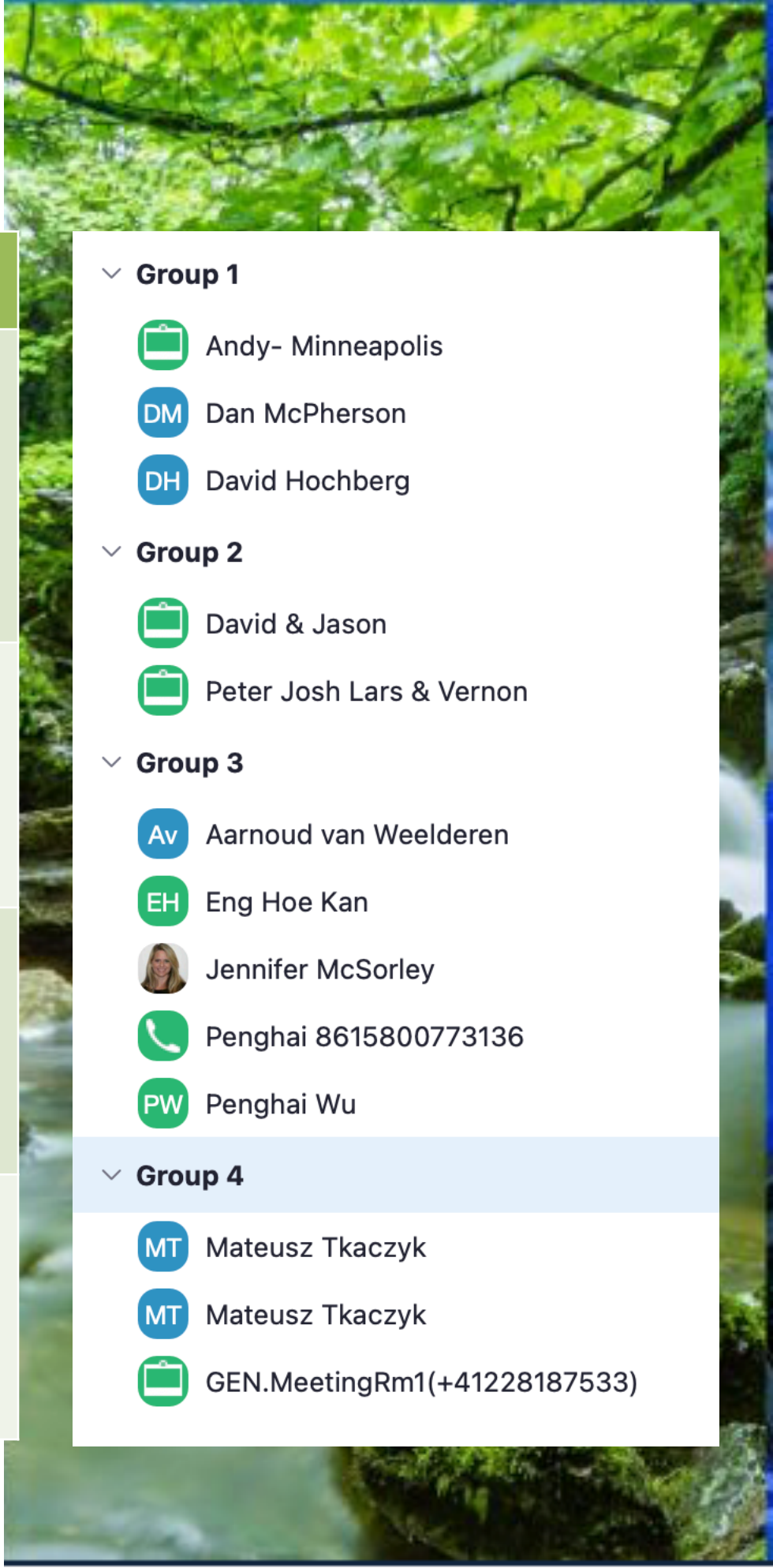


**PURPOSE** Unified Vision + Mission  
**PRIORITIES** Aligned across the team  
**POTENTIAL** Common view of future  
**PROGRESS** Transparent + Accountable



# Values & Behaviors exercise – Share-Out

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



- ▼ **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)



# PURPOSE MAPPING

Connecting my Why with Firm Why:  
Team Mission

NAME  
DATE

**My Purpose  
& Values**

**Team Purpose  
& Values**

Psychological Safety  
Clear Communication  
Decide – Balancing Empowerment & Consensus  
FIRE – Fun, Integrity, Respect, Attitude

Dan MacP  
Peter T  
+?

## Macquarie Purpose and Principles

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

### Our Principles

ARIE

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.





## 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.

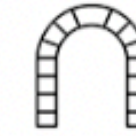


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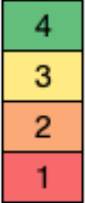
# MCT PROGRESS

Connected & Illuminated  
Life on one page

NAME  
DATE

**Purpose / Impact:**

Priority Area ('Rock')	Defined Success by [date 12+ months out / end of project]	Priorities to [eg date 7-30-90 days out as required]	Progress (Rating + status) as of [date today]
[Rock]	[Potential]	[the bridge]	[current status]



# MCT TEAM PROGRESS

**NAME**  
**DATE**

First Thursday in the Month (or close to)

**Team Purpose :**

Priority Area (‘Rock’)	Defined Success by [Date 12+ months out] [Objectives + ‘Team Toastables’]	Priorities To [Date]	Progress (Rating + status)
[Rock]	[Potential]	[the bridge]	[current status]  

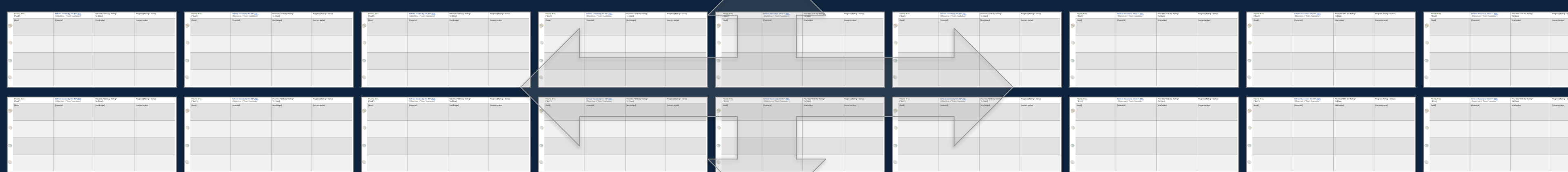
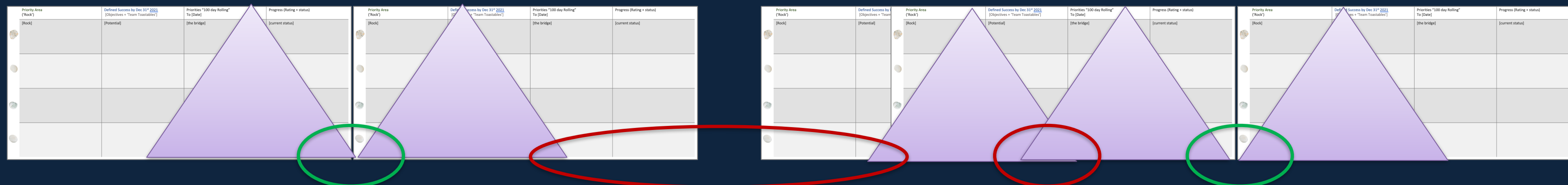




# Powerful for Teams

'ensure no red ovals; all green circles'

Priority Area [Rock]	Defined Success by Dec 31 <sup>st</sup> 2021 [Objectives + 'Team Toastables']	Priorities "100 day Rolling" To [Date]	Progress (Rating + status)
[Rock]	[Potential]	[the bridge]	[current status]







# PRIORITIES - TEAM

Clarifying and Personalizing 'Rocks'

NAME  
DATE

Team Purpose :

Aarnoud  
Jenn  
+?

Team Priorities / 'Rocks'	
	
	
	
	

DH Priorities / 'Rocks'	
	
	
	
	

[DR1] 'Rocks'

[DR2] 'Rocks'

[DR3] 'Rocks'

[DR4] 'Rocks'

[DR5] 'Rocks'



# 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...**



January 11<sup>th</sup> 2022



**THANK YOU AGAIN!**

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

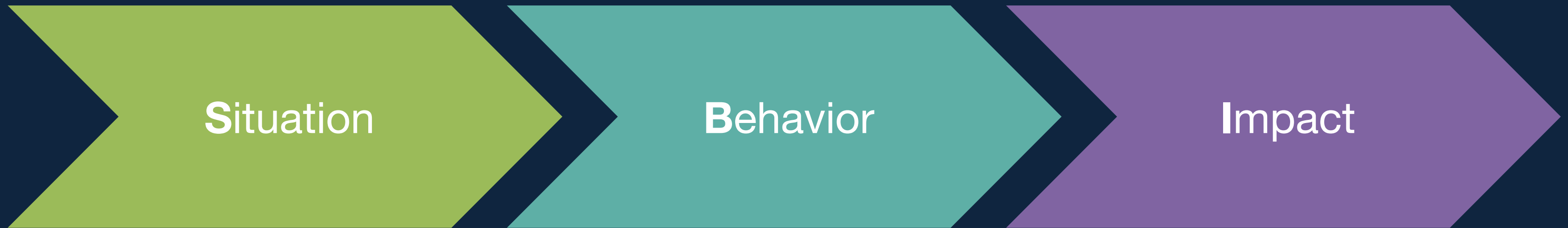


# APPENDIX

1. Tools from team session not repeated above



# 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*



# Active Listening

Image: Kris Wongsuphasat @ medium



125

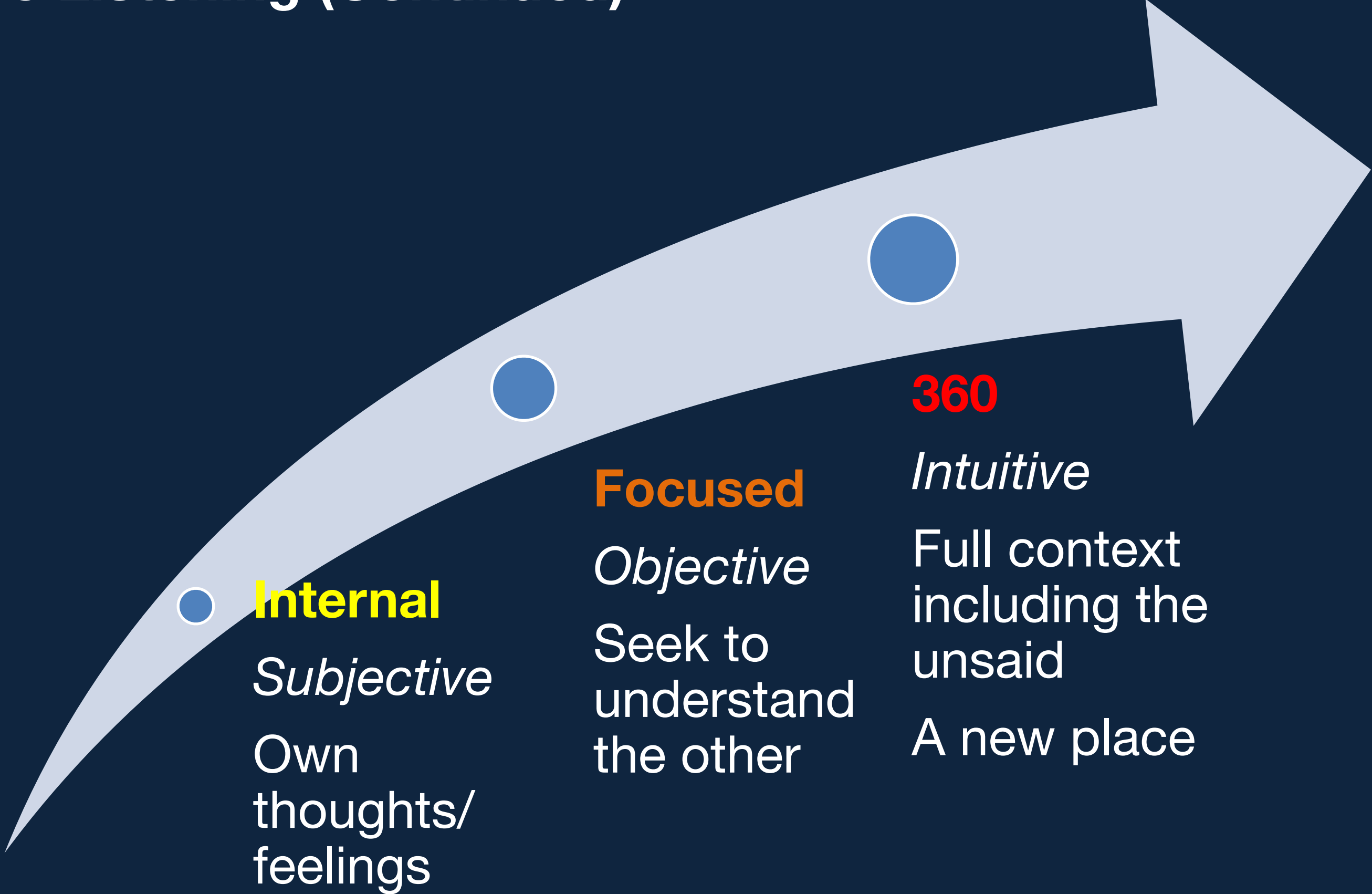


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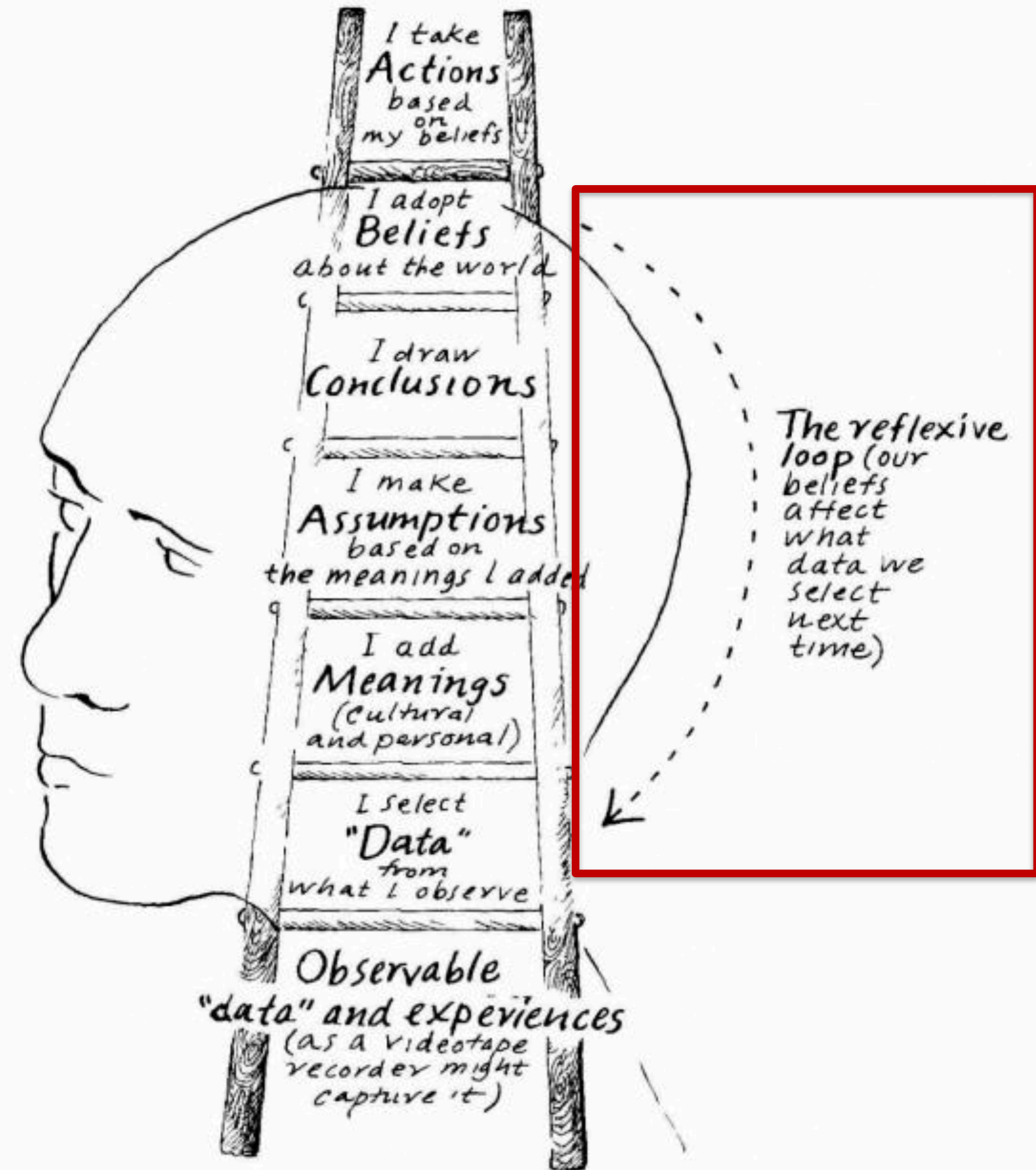




# Active Listening (Continued)



# 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

