Timing

Check-In → Group Pre-Work + Build → Individual One-Pages + Build → Team Check-out

WORKSHOP SUMMARY

|	Personal Leadership		Team Leadership		Wider Company and System Engagement	
Dates *(Suggested tbc)*	Thurs October 28th	Thurs Nov 4th	Thurs November 18th	Thurs December 9th	Thurs January 11th	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	• Intros: to people • Intros: to concepts • Norms	• Intro to Purpose-Driven Leadership: From Purpose to Performance • Listening skills • Purpose mapping and Connecting Work 'Rocks' (SharePoint)	• Reviewing PDL – Individual • Leader Summit	• 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	• *Shift Positive 360 results* • Team influencing • Work on One Page as enduring tool (co-led with David H)	• Team reflections and look forward – and requests for help • Where has change been positive • Where do we still need to focus?

Check-in + Welcome

David Hochberg

Timing

Check-In → Group Pre-Work + Build → Individual One-Pages + Build → Team Check-out
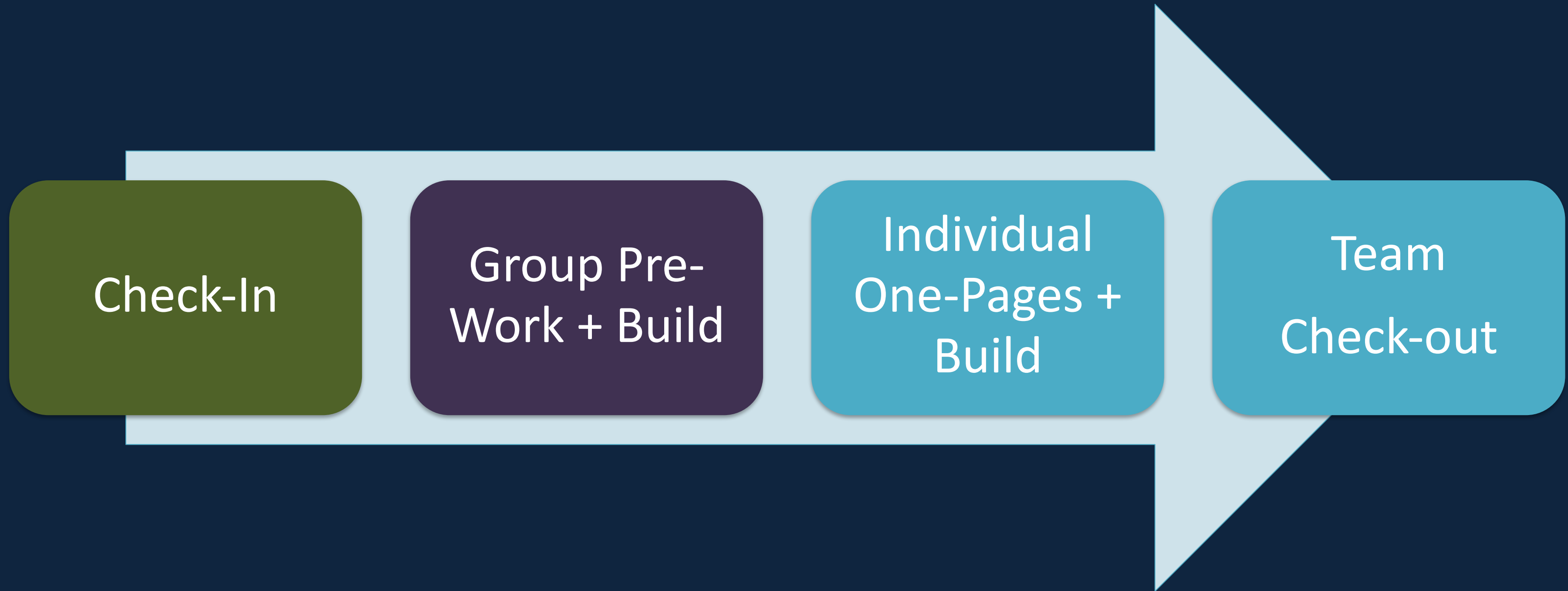
PURPOSE MAPPING

Connecting my Why with Firm Why:
Team Mission

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

...ty

...entify opportunity and
...or 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.

PURPOSE MAPPING

NAME
DATE

My Purpose
& Values

Trust

Respect

Creative / Forward thinking

Wanting Growth
(business / personal)

Competitive but supportive

Teammate / motivator / role
model / motivator / leader

Family / safes space /
Community / Charity /
Religion

Team Purpose
& Values

Working Environment

F.I.R.E.
Fun, Integrity, Respect and Energy

Psychological Safety

Diversity of skills, thought, talent

Purpose

Decide– Decision making,
empowerment and consensus.

Clear Communication

Clear Strategy and Management

Principles

Ownership–
Success/Failure/Problems

Engagement with Stakeholders
and Community

Growth / Training / Development /
Mentoring

Macquarie
Purpose and Principles

Our Purpose
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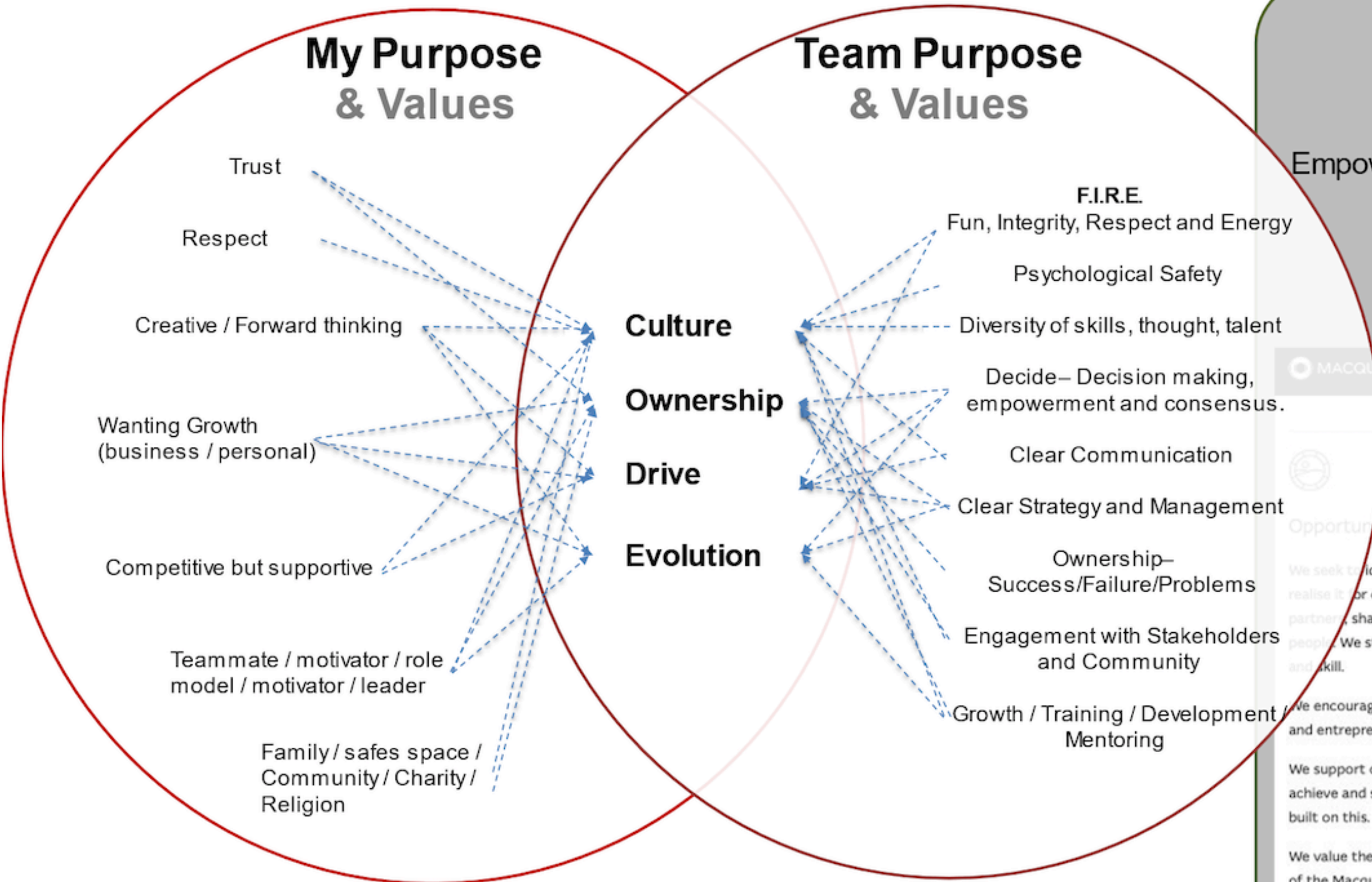
Our Principles

MACQUARIE

Opportunity

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Team Purpose & Values

Culture

Ownership

Drive

Evolution

F.I.R.E.
Fun, Integrity, Respect and Energy

Psychological Safety

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Macquarie
Purpose and Principles

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Macquarie Purpose and Principles

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Our Principles

○ MACQUARIE

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PRIORITIES - TEAM

Clarifying and Personalizing 'Rocks'

Team Purpose :

Aarnoud
Jenn
+?

Team Priorities / 'Rocks'

DH Priorities / 'Rocks'

[DR1] 'Rocks'

[DR2] 'Rocks'

[DR3] 'Rocks'

[DR4] 'Rocks'

[DR5] 'Rocks'

PRIORITIES

Clarifying and Personalizing 'Rocks'

MCT Leadership Team

FOCUS ON…

- **How we show up:** Defining Leadership Style (Leadership Shadow); Communication / Collaboration (Active Listening & Sharing); True to Values
- **Goal and Vision Setting**: Providing Direction to Team (and sharing with teams) and monthly Check in (Is MCT moving in the right direction?)
- **Delivering Results**: Holding each other accountable (meeting milestones)

Direct Reports

FOCUS ON…

- **Communication**: Sharing MCT Vision [+ strategy]; [Ongoing] communication (Intentional) via regular 1:1 catch ups
- **Talent Development**: Coaching / Learning / Training / Career Development (Goal Setting / Presence & Influence)
- **Values for all**: Collaboration, Accountability [+ highlights from Team values work]

Client Commitment

FOCUS ON…

- **Client Outcomes and Loyalty**: How do our Clients see us? How do we want to be seen?
- **Client Management**: Assessing their needs, Regularity of Communication, Problem Solving (Be creative, Provide solutions)
- **Pipeline management**: Goal Setting (i.e., timelines/deal closings)
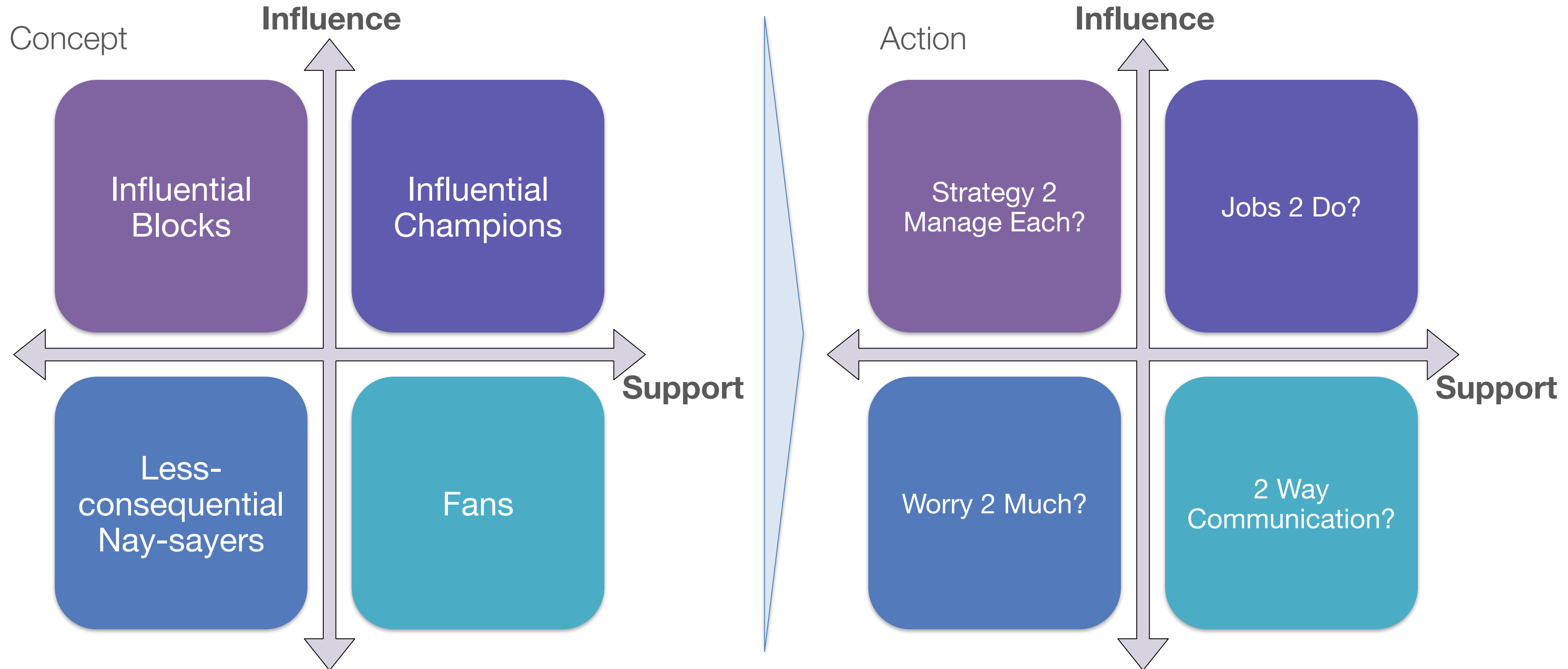
Stakeholders-Partners

FOCUS ON…

- **Key Stakeholders**: Bankside; Credit (RMG and Business); Market Risk
- **Share MCT Vision, Strategy, Approach**
- **Ongoing Communication**: "What are we up too?" Regular Check-ins in addition to Quarterly Town Halls

Draft in the Past Tense – "Toastable" Sentence(s) you want to be true / have happened by the date at the top
Think both Concrete / Quantitative (e.g., numbers) and Vivid / Qualitative ('champagne moments')
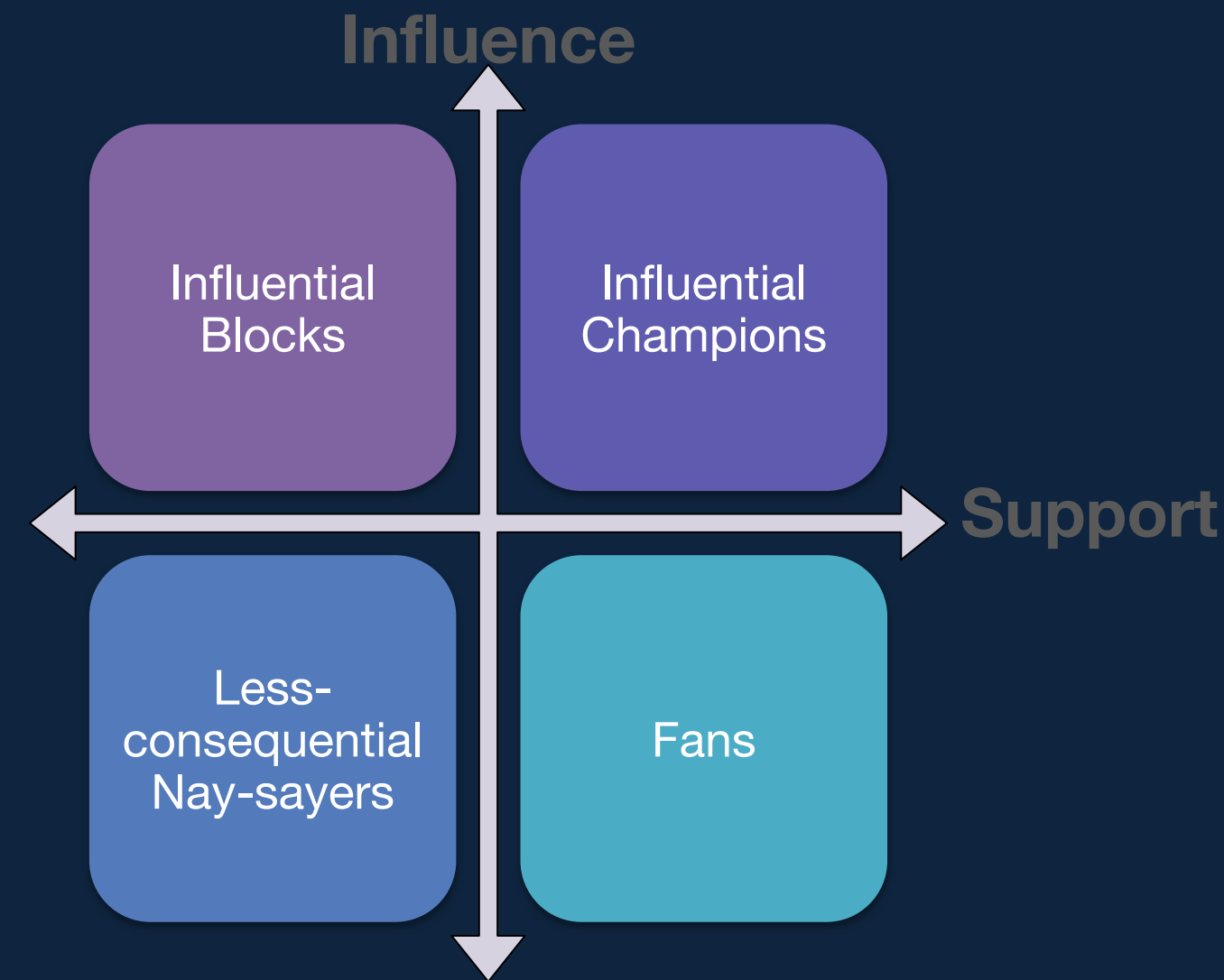
STAKEHOLDERS

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

Concept

Influence

Influential Blocks	Influential Champions
Less-consequential Nay-sayers	Fans

Support

Action

Influence

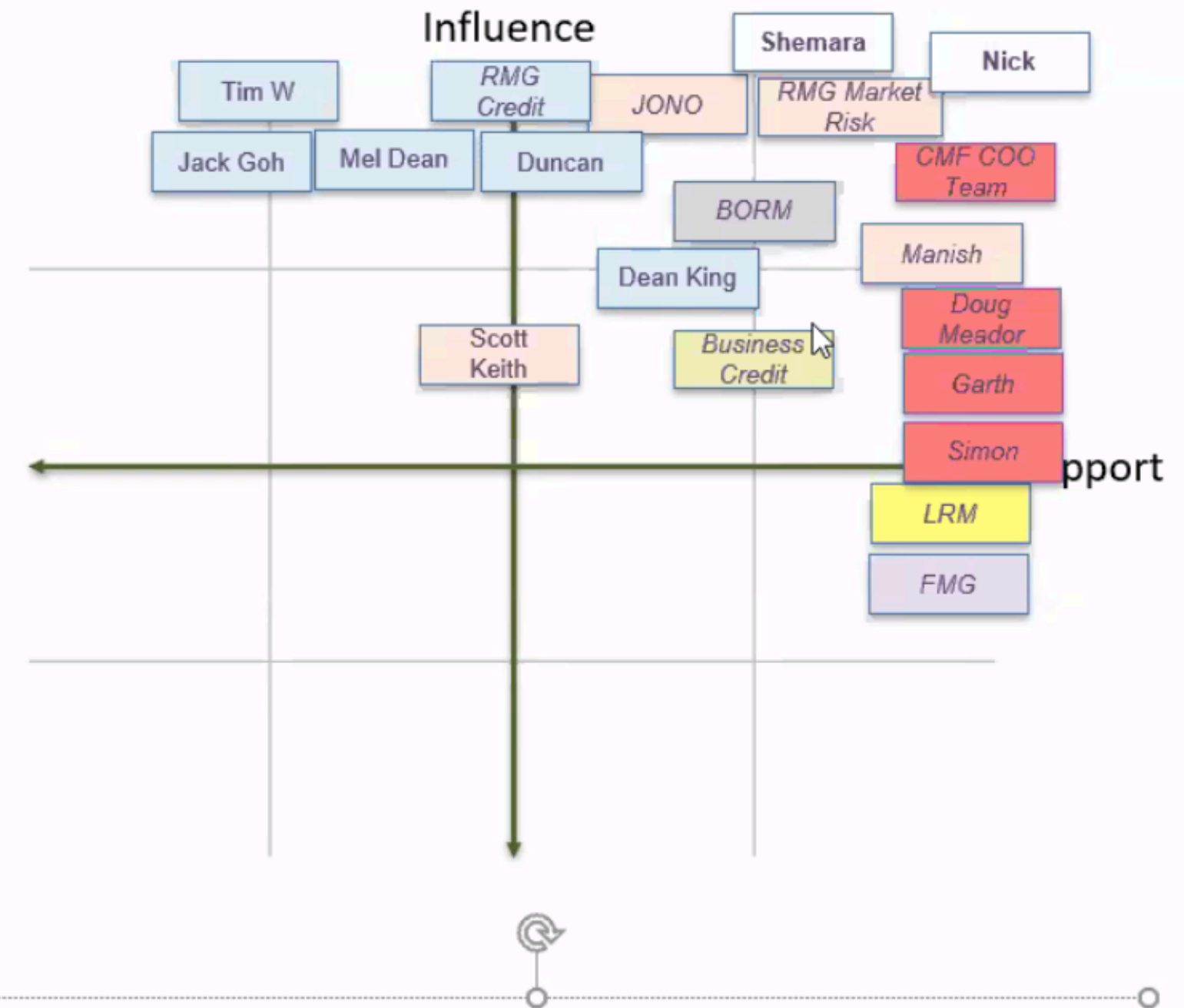| Strategy 2 Manage Each?	Jobs 2 Do?
Worry 2 Much?	2 Way Communication?

Support

MCT – Our Stakeholders

Stakeholders:

○   common targets for better relationships? – who to move and how to move them?

○   Managing the MCT brand in 2022?

Influence

Influential Blocks	Influential Champions
Less-consequential Nay-sayers	Fans

Support

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

MCT TEAM STAKEHOLDER MATRIX

Influence

Tim W, Jack Goh, Mel Dean, RMG Credit, Duncan, JONO, Shemara, RMG Market Risk, Nick, CMF COO Team, BORM, Manish, Dean King, Doug Mesdor, Scott Keith, Business Credit, Garth, Simon, LRM, FMG

Support

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

The Base of A Classic Strategy Pyramid

Purpose - The 'Why'

VISION

....

MISSION

Empowering people to innovate and invest for a better future

OUR MCT 'ROCKS' / KEY PRIORITIES
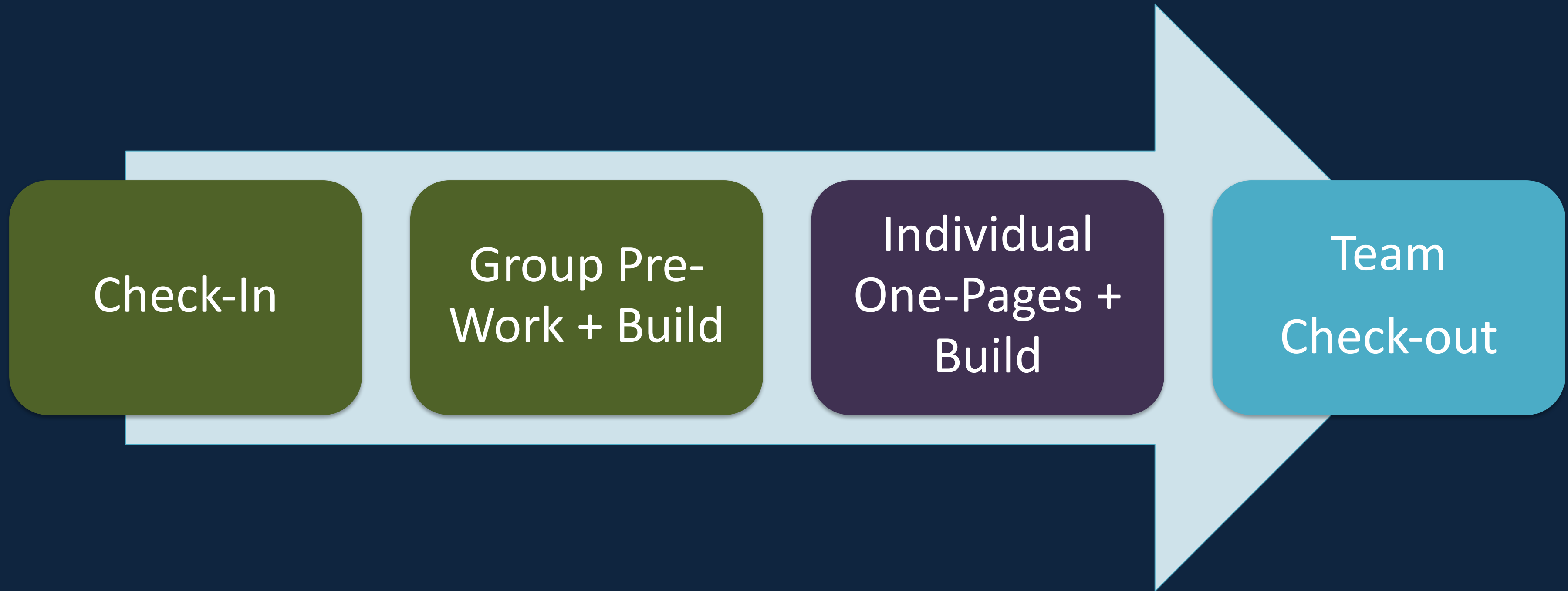
STRATEGIES

RESULTS

VALUES + PRINCIPLES

Opportunity | Accountability | Integrity

This team…

Timing

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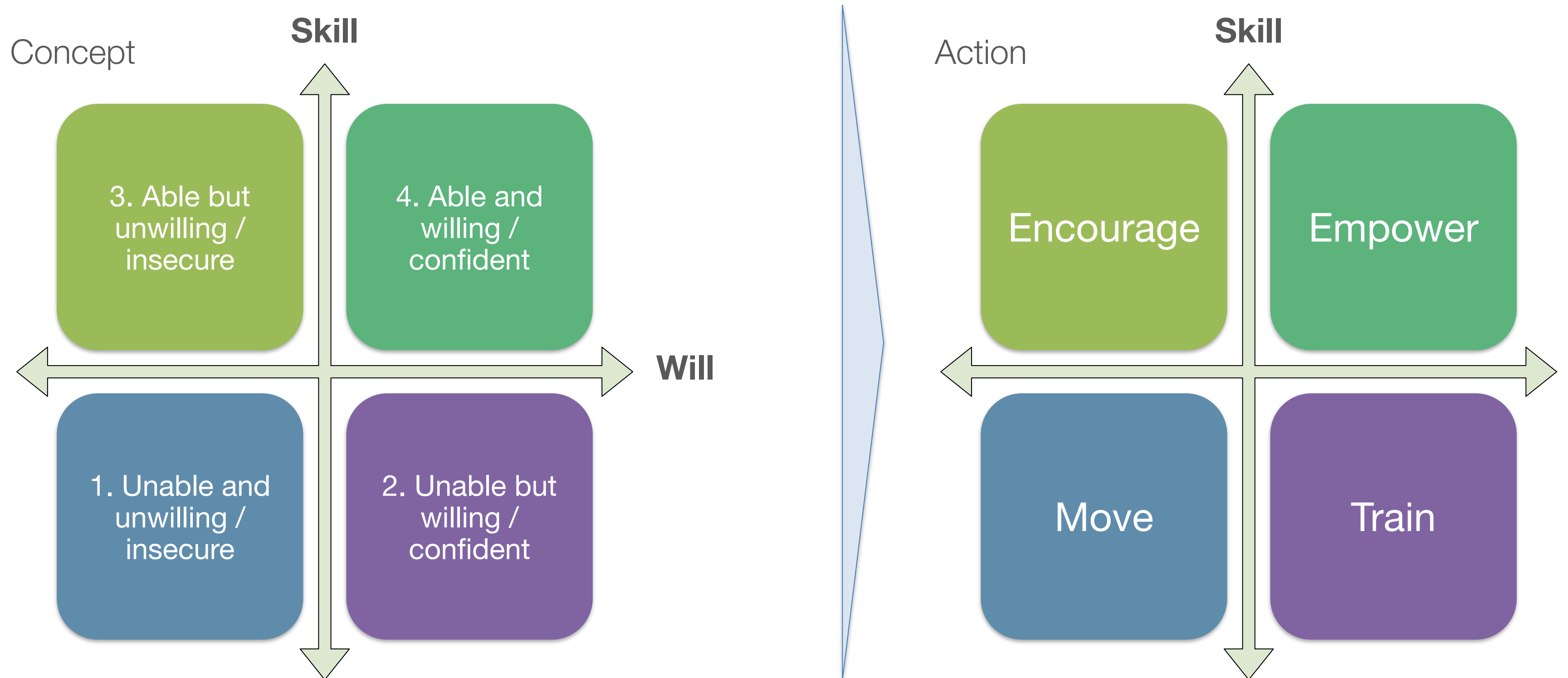
[Name] – MCT On One Page

Priority Area ('Rock')	Defined Success by December 31st 2022	Priorities to [eg date 7-30-90 days out as required]	Progress (Rating + status) as of [date today]
[Rock]	[Potential]	[the bridge]	[current status] 4 3 2 1

TEAM & CONTRACTORS

Max Landsberg*   *The Tao of Coaching, 1996 [Derived from Hersey & Blanchard, 1977]*
Skill Will Matrix

Concept

Skill

Will

3. Able but unwilling / insecure	4. Able and willing / confident
1. Unable and unwilling / insecure	2. Unable but willing / confident

Action

Skill

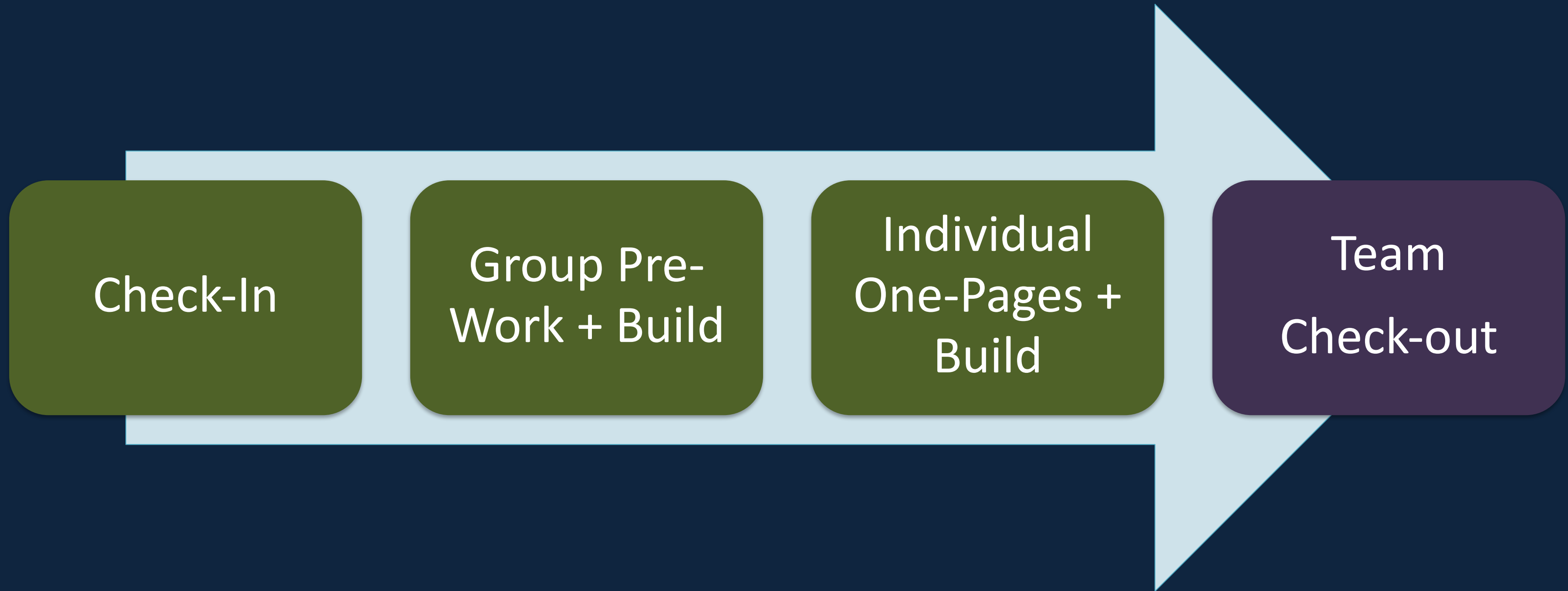|	
Encourage	Empower
Move	Train

TEAM SKILL-WILL MATRIX

Skill

Will
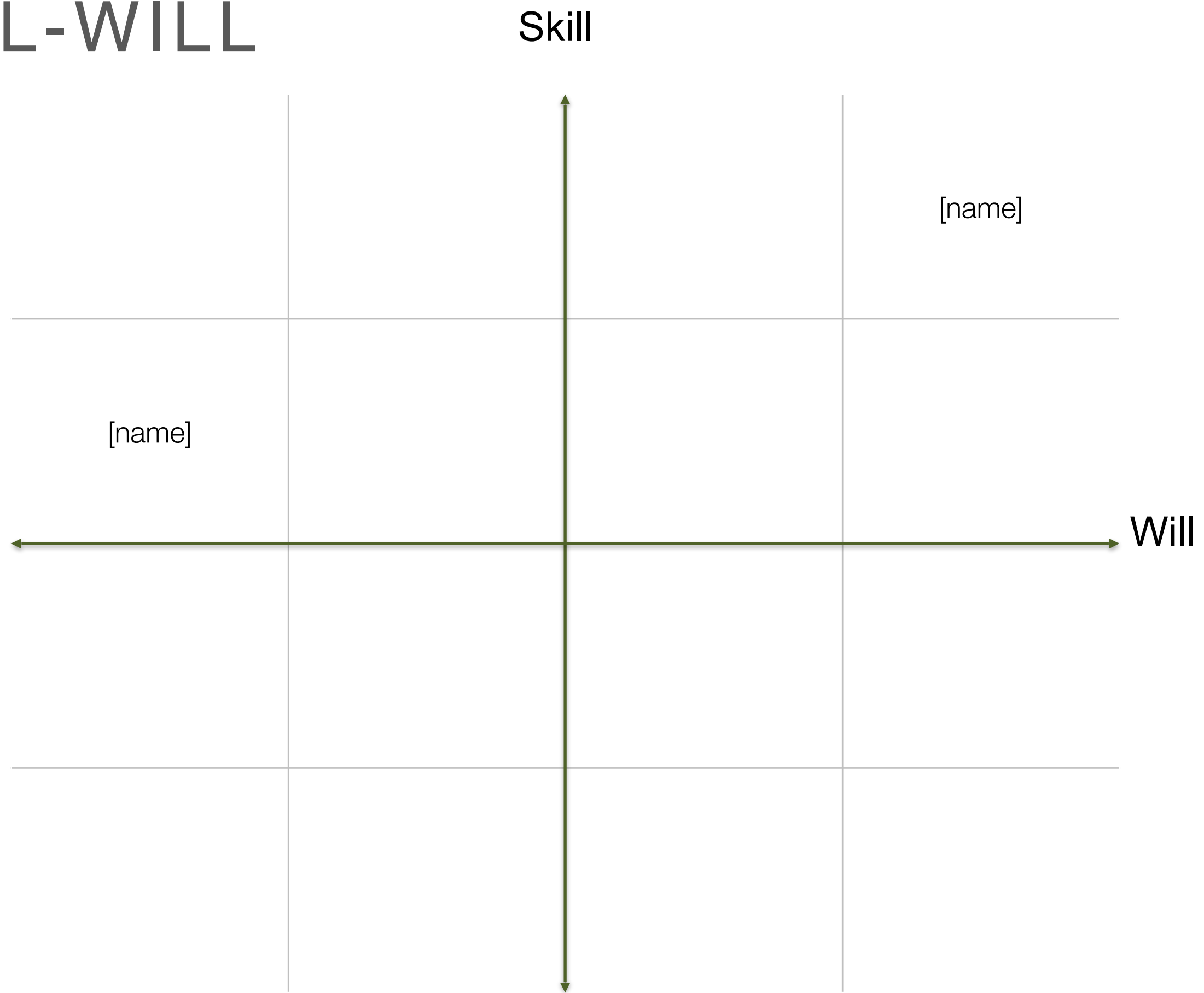
[name]

[name]

[name]

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

[name]

Timing

Check-In

Group Pre-Work + Build

Individual One-Pages + Build

Team Check-out

Team reflections and check-out...

Where has change been positive (me and team)?
Where do we still need to focus as a team?

Any other check-out thoughts?

WORKSHOP SUMMARY

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MCT – Monthly Check-In [All-team slide + one each]

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[Rock]	[Potential]	[the bridge]	[current status] 4 3 2 1

Close Out

David Hochberg
Meredith Bellezza
Jen Grace Baron
Peter Boyd

Potential Follow-Ups

Feedback Survey – much appreciated
Keep working on your PPPPs
Look after / communicate to your SP360 stakeholders
Embed the values and tools you found useful in your day-to-day + monthly meetings
Peter continuing to support / keep in touch with David