bates

Exploring Development Themes in ExPI Insights Meetings:

Proven Techniques for Building Self-Awareness

By Scott Weighart, Director of Learning and Development

As we've reviewed in earlier articles for the Bates ExPI Community of Practice, leaders are often eager to dive into the development themes right at the start of the one-hour insights call or meeting. We cover the following steps first to lay the right foundation for the discussion:

- Affirming the specifics regarding the confidentiality of the conversation
- Reframing the business context in our own words and confirming that we have it right
- Asking for high-level general reactions to the ExPI feedback and commenting on the reactions
- Reviewing strengths—connecting them to the business context and asking the leader to comment on how they show up for him or her.

These steps are all crucial precursors for exploring development themes.

- Getting clarity on confidentiality will encourage candor.
- Nailing the business context builds confidence in you as an insights provider and ensures that the business imperatives are top of mind for you and the leader.
- Reviewing and learning more about the leader's strengths reduces defensiveness and gives you and the leader a better sense of what strengths can be leveraged as well what ones may show up sooner or later as over-strengths that illuminate the development themes.

Once these steps are complete, you will turn the leader's attention to the next phase—exploring a handful of the lower-rated facets. Let's review each step of the process.

Before the Insights Conversation - Determining Which Facets to Explore

Before the insights conversation, it's helpful to make a tentative decision about which facets you'll explore and in what order. While it can be tempting to simply tackle the lowest-rated facet first, this may not be the best way to go. You really need to have a rationale for which facets to explore first, second, and so on. Here are some helpful questions to ask yourself:

1. *Among the lower-rated facets, are there some that seem more important than others due to the business imperatives?*
   Let's say a leader's imperative is showing up as a trusted advisor and strategic partner, particularly when communicating up. We look at his lowest-rated facets, and we see Authenticity, Concern, Resonance, Practical Wisdom, Composure, in that order. In that case, I probably would be tempted to start with Practical Wisdom and see what's getting in the way of it showing up. Why Practical Wisdom first? Working on that one could help

Ei World

the leader come off as that much more of a strategic partner—someone who shows up with concise, relevant insights. I would tentatively go to Resonance next to see if we can see if being attuned to the audience's need is what's keeping the Wisdom from coming across as Practical. But I would be ready to go in a different direction depending on what we surfaced when discussing Practical Wisdom.

What if the same leader were trying to engage his employees? Then I might look at Concern first. If he were driving a transformational change? Probably Composure or Resonance would be my first stop. Basically, you have limited time in the insights conversation, so it's best to hit the facets with the greatest potential impact first.

2. *Is there a chronology that would seem to be a logical progression, hopefully speeding understanding?*
   Sometimes I don't start with the facet that I'm hypothesizing to be the top development theme. Instead, I might consider picking a different facet that will give insight into other facets or maybe just feel like an organic path.

   Here's an example. In one insights conversation, I worked with a leader who had several low-rated facets, including Practical Wisdom, Resonance, and Interactivity. I decided to start with Interactivity. My rationale? If the leader has issues related to the quantity and quality of two-way communication, we might be best off solving for that first. After all, if the leader wasn't giving herself enough opportunities for dialogue—or if the quality of those opportunities wasn't coming across—it obviously would be hard for Resonance to show up. If you aren't even in front of people very often, they're unlikely to see you as attuned to their needs, concerns, and nonverbals.

   So, with that leader, we went from Interactivity to Resonance, and we got through Resonance faster because we had already surfaced some of the issues… and by the time we explored those two, we both already had a pretty good sense of why Practical Wisdom was lower in the eyes of others.

3. *Which facets are "must discuss" versus "nice to discuss"?*
   Given that time is limited, you'll almost never have time to explore every facet that's of interest. You need to manage your time to get through at least three, and four is ideal. I recommend that you prioritize three facets to cover and put down a fourth one in case you have time… and to give you some options if the conversation makes you change your mind about which ones to explore.

4. *Is the best course of action to march through three or four facets, or is there some other slice of the data that would represent a more productive path?*
   Sometimes going facet by facet isn't the best way to get to the heart of the story. This can be especially true for leaders who have very high scores across the board and/or who have less quantitative range among their facets.

What might we do instead? Sometimes I've found it interesting to explore the lowest-rated items page in lieu of a facet or two. For a leader with high scores, this helps us get to the nuances of improvement much faster. It also can help us surface a theme that cuts across several facets.

For example, let's say a leader has these as the lowest-rated items:

- "Always seems to be a step or two ahead in thinking things through (Practical Wisdom)
- "Knows how to shift others from a reactive to a proactive frame of mind (Composure)
- "Paints a vivid and compelling picture of what could be." (Vision)
- "Among the first to recognize the need for course corrections" (Intentionality)
- "Encourages others to experiment, trust themselves, try new things (Concern)

Here we have not only five different facets but all three dimensions represented. Yet there is a common theme: This is someone for whom "future focus" seems to be an issue. There are many reasons why that might be the case, but pointing someone to these items can be more efficient than teasing them out from three or four different facets.

Options for Exploring Development Themes

After creating this tentative road map of facets to explore, we'll be ready when it's time to do so in the insights conversation. Here are some keys to doing this effectively:

1. *Start off with a Socratic approach.*

Ideally, your role is to be a facilitator of insights or a guide in the process—particularly in the early going of exploring the development themes. Given that you're a highly intelligent person with much more knowledge of the model than the leader who's going through the insights process, it can be tempting to jump in early and often with insights and solutions.

Resist those urges. The leaders who take the ExPI assessment are also very intelligent, and they often are capable of generating amazing insights from their data—including how to make the feedback actionable. It's not unusual for their insights to be far richer than your own: After all, they are the ones who know the raters and who lived through the experiences that generated perceptions of them, for better and worse. On top of that, the leader is far more likely to own the insight and commit to the action if it's their idea.

Here's how you would use a Socratic approach to exploring a facet:

- ***Suggest a facet to explore and immediately ask the leader to go to a specific page number in the report.***
  We always want the leader to have the data in front of him or her.

- ***Briefly review the definition of the facet in simple language.***
    - Here you might say something like this: "As we look at your data under Vision, remember that Vision in this model is really equal parts strategic thinking and inspiration."

- ***In a very open-ended way, ask the leader to reflect on what he or she sees in the data.***
    - You could say, "Bearing this definition in mind, what strikes you as you look at your data on Vision?"

- ***Be patient.***
    - Some leaders will have immediate insights about something—a theme in the facet, a surprise from a rater group, or a stark contrast between a high or a low. Others may not be as quick to notice something. Give it a little time to breathe.

- ***Notice what the leader is noticing.***
    - Through your preparation for the conversation, you should already have a sense of what you think is worth discussing for a facet. But that may or may not be what strikes the leader as worthy of exploration. What the leader chooses will say a lot: While you may think a low rating from Peers jumps out, the leader may offer a valid reason why some other result is more interesting to discuss. Going where the leader wants to go first is often more rewarding and constructive.

2. ***Appreciate the limitations of a purely Socratic approach as well as how and when to be more somewhat more directive in steering the exploration.***
   In a perfect world, you could simply use a Socratic approach, playing a more facilitative role as leaders talk their way into insights and action steps. While it's not unusual to have things work out that way, there are limitations to this approach that usually make me diverge from it at some point during the exploration phase:

    - ***It's a time-consuming approach.***
      Leaders will vary dramatically when it comes to how quickly they can sift through their results for a facet and cull out the most powerful takeaways. They may struggle in determining which items, raters, or score ranges should be discussed. Even when they get to a good place, it's seldom fast. When you have just 30-40 minutes to explore three or facets, there's not just not enough time to treat all facets this way.

- ***Some leaders will struggle mightily when it comes to hypothesizing about why perceptions are what they are.***

  You will be amazed at how astute and fast some leaders are when it comes to making sense of their ratings… and how much others are at sea no matter how much you question, probe, or reframe questions to guide reflection.

  Here's an example: At the end of every insights conversation, I always ask each leader to tell me what was particularly valuable in both the process and content of our hour or so together.

  Here are two very different responses I received:

  - Leader A: "Process wise, it was helpful to answer your questions and go through in a structured way what I think looks good, what needs improvement, and what concrete steps I could take? The most useful part of this was talking through it... You understand it when someone lets you talk through it and make your own connections."

  - Leader B: "I think the process is nice. I like that you're not afraid to go in and talk about why this or that might happen, trying to figure out and do some digging together and offer hypotheses... I have done a lot of these before, and they want you to figure it out for yourself. That has really frustrated me. In one hour, you have homed in and said, 'Maybe this is the issue.' I appreciate the candor."

  This supports the need to vary your approach depending on the leader. Leader A was a really senior guy with an incredible ability to connect the dots between his ratings, specific situations, and what to do differently. So mainly I provided him with a framework and questions to guide his reflection, and he was happy with that. I think he would have resented a more directive approach.

  With Leader B, I tried several times to point her at data worth exploring, even narrowing the focus on a few specific items worthy of reflection. She continued to draw blanks. She needed more help to make sense of it—especially when it came to what to do about it. Ultimately, I offered her more hypotheses than I ordinarily would. More about that shortly.

3. ***Use a more directive approach when time or the leader's self-awareness call for it.*** Given the aforementioned limitations, let's see what a more directive approach would look like. However, bear in mind that this is not an "all-or-nothing" choice. You can steer a leader to look at some data, and you can offer hypotheses about what *might* be happening—all without going into a "telling" or "problem-solving" mode. Here is one general rule:

When time is tight, be quicker to point the leader to a particular data point or two. Even if the leader is agile when it comes to generating insights, you only have so much time to explore the richness of the report. So, by the time I get to the third or fourth facet, I'm often looking to see if we can get to the heart of things quickly. That will mean being somewhat more directive. A good approach is to still remind the leader of the definition of the facet, and then point them at something interesting:

- "In Intentionality, it looks like there were some significant differences between your self-ratings and your manager's ratings on Item ____ and _____...."

- "In Vision, you received sky-high ratings from everyone on the items most related to strategic thinking… but your peers and direct reports seemed to rate you much lower on items ____ and _____, and those items have a common theme of inspiration…."

- "Let's look briefly at your lowest-rated items on page 11. One item rated rather low by your manager seems like an important one to consider when we think of your goal of being seen as more of a strategic partner…"

4. ***With either approach, ask questions to help the leader drill down into the items to find meaning.***
   However you get there, it's important to ask questions that help the leader reflect on why the perceptions exist. Your language here will be very important: You don't want to judge; you do want to stimulate reflection. Here are some questions that you can ask when getting leaders to think about specific items:
   - "Can you recall a specific situation that might have led to this quality failing to 'show up' in the eyes of others?"

   - "It looks like your peers rated you lower than others on this item. Do you remember an interaction you had with one or more of these peer raters that might have led to this perception?"

   - "What do you think might be getting in the way of this quality coming across to others?"

   - "You rated yourself much higher than others on this item. It may be like a radio signal: You're transmitting a strong signal, but it's not getting received as strongly as it could be. What might be keeping it from being perceived as strongly from others as you're feeling it?"

- "Remember that the data can only capture others' perceptions of your behavior. It can't capture your intentions—what's in your head or your heart. Bear in mind that these perceptions can be changed. But do you have any hypotheses about why these perceptions are what they are now?"

- "Can you think of a recent event that may have led to these perceptions—or maybe something that happened a good while ago now?"

5. ***If the leader gets stuck despite repeated probing, be ready to offer some hypotheses based on their open-ended comments or the discussion of their strengths.***

When the leader is stumped about a given data point, I've seen some ExPI insights providers default too quickly to suggesting following up with raters. That can always be helpful, but it shouldn't be a first resort. Instead, you should be ready to offer some hypotheses based on the open-ended comments or strengths conversation.

Let's say a leader has no idea why some of his Concern ratings are low. You might point them to a specific detractor comment or two, such as these:

- "It appears he feels he has to be in every situation. He needs to learn to delegate more and trust his subordinates."

- "He should promote and help mentor his team by providing more visibility of the team within and outside R&D."

Often this will prompt some sort of insight from the leader. Likewise, you may be able to play back something a leader said when you asked them to describe a strength or two. Here's how that worked for a leader who is getting low ratings on Practical Wisdom:

- "When you talked about your strength in Humility earlier, you said that you rely heavily on others and always make it a priority to make sure that they have a voice… Here's one hypothesis I have: I wonder if the fact that you want to hear from others makes you less inclined to step up with your own insights? It could be that your Humility can be an over-strength at times. What do you think?"

Here's another example for a leader who received low ratings on Vision:

- "When you talked about your strength in Restraint earlier, you said that you always like to think things through and not weigh in until you're really confident about your view… and that you'll wait to hear what others say first. Do you think that style could affect how others perceive your ability to 'paint a vivid and compelling picture of what could be.'?"

Leaders don't always connect the dots between their strengths and their development themes, and they can find it very valuable when you get them to think about it. The key is to always state hypotheses rather than facts—sometimes you'll miss the mark, but it can be a great way to stimulate thinking.

6. ***Be ready to change course depending on what you learn as you go.***
   You don't want to be too rigid about your game plan. There have been many times when I came into an insights meeting with a strong hypothesis about what the story behind the numbers would be—only to have my hypothesis blown out of the water within the first ten minutes.

   Alternatively, you may have a few different possible hypotheses, and you may need to dig into a facet before you know which one is right. Here's an example. I went through an insights call a while ago to a leader who had very low ratings in Practical Wisdom, which are often more of a symptom of issues in other facets. But which one or ones in this case? When I got him to talk about what was keeping others from seeing real insight from him, the issue was that he was like a "deer in headlights" when grilled by senior leaders about his function, Supply Chain Management. Based on that, I decided to go to Composure next in order to understand what led him to struggle under pressure. But just as easily, we could have dug into Authenticity next if the issue seemed more like a struggle to be transparent or to devote adequate preparation time prior to meetings.

7. ***Ask the leader for ideas on how to make the feedback actionable, withholding your own ideas for now.***
   One way or another, you'll help the leader generate some insights about why an item is not showing up as strongly as it could be. Once the two of you have a viable hypothesis about what's behind the rating, see if the leader has some good ideas about what to do about it. Here are some good ways to prompt those insights:
   - "So what do you think you could do differently to make ___________ come across more clearly in the eyes of others in months to come?"

   - "Have you seen the movie *Groundhog Day* with Bill Murray? Do you remember that he was forced to relive the same day again and again to get it right? So if we had you go through that tough presentation you described again and again, what would you differently to make the quality of ______ show up for others?"

   - "Have you seen the movie *Back to the Future*? If we could jump in a time machine and fast forward to six months from now, and you were really showing up with this quality of _______ in the eyes of your _______, what would you be doing differently? What would 'good' look like for you with this quality?"

More often than not, leaders will come up with some good ideas when prompted in this way. Capture them, so you can refer back to them in the final ten minutes of the meeting. Likewise, you, too, will be coming up with all kinds of great ideas for how to make the feedback actionable. Jot those down, too… but keep them in your back pocket for now. If you intervene too quickly, you may discourage the leader from coming up with more good ideas. On top of that, you want to keep the focus on exploration during this middle phase of the insights meeting. You'll have an opportunity to become that much more directive during the ten-minute wrap-up phase that concludes your session.

8. Look for opportunities to connect the dots as you explore the facets together.

As you gain experience as an ExPI insights provider, you'll become better and better at connecting the dots in a variety of ways:

- How your discussion of the strengths foreshadows the exploration of some development themes
- How a story about one facet and item sheds light on another facet, guiding you toward which facet to explore next
- How helping the leader solve for one facet can reap benefits in several others

Here are a few examples of how I've seen these qualities play out:

- Leaders who are very high in Integrity may have an over-strength that leads them to be very rigid, having a negative impact on qualities such as Concern and Resonance.
- Leaders whose strong action bias leads to high ratings in Confidence might see speed work against them in facets that require a more deliberate approach, such as Restraint, Resonance, and Inclusiveness.
- Exploring the facet of Assertiveness may reveal a tendency toward conflict avoidance, consistent with a leader's highs in Concern and Resonance as well as their lows in Intentionality.
- Digging into the facet of Humility may help a leader become aware of the downside of their signature strengths in Authenticity, Practical Wisdom, and Confidence.
- A leader may realize that their ideas for amplifying Resonance are likely to reap dividends in Practical Wisdom, Concern, and Inclusiveness.
- Another leader may discover that increasing the quantity and quality of two-way communication in Interactivity will improve perceptions in several areas, such as Authenticity, Concern, and Inclusiveness.

Leaders often find it quite magical when you make observations about these connections. We want to keep a real dialogue going, and you don't want to dazzle people constantly with your own insights when you could be getting people to develop and share their own. That said, sprinkling in some of these tidbits can speed insight and bolster perceptions of your credibility.

Final Thoughts

Be patient with yourself as you work toward mastery in helping others explore development themes. If you're still new to it, trust the process, and don't put pressure on yourself to know the facets, items, and connections inside out. You can have a very successful conversation simply by getting people to open the report and asking them questions to get them to think through what might explain their results. Over time, you'll see more and more patterns and themes, and you'll discover language that helps people get unstuck and get to insight.

Once you go through even four or five ExPI insights meetings, you'll feel that much more assured in your approach. If you're impatient about speeding your progress, I recommend that you read and reread some of the earlier ExPI Community of Practice articles, particularly the ones on building your facet fluency, nailing the business context, understanding facet correlations, and discussing ExPI strengths. It's great fun to build confidence and competence in this area of ExPI insights meetings. Exploring never gets old.