Making the Most of 30 Minutes: Keys to Conducting a Great Orientation Meeting

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When people become certified practitioners, they often focus most of their energy—and anxiety—on the insights meeting. This makes sense: In addition to being twice as long, the insights conversation has a much looser structure, and there is more of an art to it.

That said, I find that new certified practitioners sometimes underrate the importance of the orientation meeting. This is also understandable: This conversation is much more structured; it can even feel formulaic. And the goals are straightforward: Build some rapport; take 15 minutes to learn as much as you can about the business context, then take the remaining time to walk the leader through their ExPI report, user's guide, and developmental summary worksheet.

While it's fair to say that there is less chance of things going terribly wrong during an orientation meeting, there are enough subtleties to the process that you can easily miss opportunities for both parties to get as much out of the conversation as possible. With this in mind, this article is devoted to making the most of these 30-minute conversations.

Considering the Subtext of the Insights Conversation

I am an avid reader—and occasional writer—of fiction. One of the most interesting aspects of reading and writing a story is what can be gleaned between the lines---not just thinking about what's said but what it means and how it's said. For that matter, what's left *unsaid*?

The same is true when you're conducting an orientation meeting. On the surface, it all can be very straightforward: Follow the script; ask the questions; write down the answers; then go back to the script to walk through the three documents and answer questions along the way.

No great sin has been committed if that's all you do in this conversation. But on the next page, I've tried to do justice to capturing what you might be missing if you're not deliberate about considering the subtext of what you say and do as well as what the leader is saying and doing.

	Insights Provider	Leader
Text	• Asking questions about context • Explaining the documents • Answering questions about the documents	• Answering questions about context • Reacting to report • Asking questions about documents
Subtext	• Are you actively building some rapport and connection? • How is your energy and engagement coming across? • Are you getting what you need to nail the business context on the next call? • Are you explaining things without getting drawn into an insights conversation?	• How engaged is the leader in this conversation? • How are you experiencing the leader's communication style, personality, and attitude? • Is the leader's behavior with you consistent with comments and ratings on the report? • Does the leader's initial reaction to their data seem appropriate and reasonable? • What are the implications of the leader's behavior for the insights conversation?

Let's review each bullet point for the subtext of the orientation meeting.

Subtext of Your Behavior as Insights Provider

Even though you're following an established script for this conversation, you have many opportunities to shape the quality of the orientation meeting experience for the leader. Here are some tips related to each subtext point.

1. Are you actively building some rapport and connection?

While 30 minutes is not a great deal of time, you do want to devote a minute or two to establishing yourself as a supportive and attentive presence. This is especially true when you consider the wide range of possibility in how leaders show up for this conversation. The leader may begin the conversation feeling:

- Fully present or distracted because of a previous meeting or looming deadline
- Enthused, anxious, upset, intrigued, or enthused about the report
- Delighted, wary, or resentful about participating in the conversations (and program if there is one)

Regardless, your job is to "meet leaders where they are" and help them be in the moment. You also need to convey genuine interest and curiosity in them. Here are some things that can help:

- Look up the leader's LinkedIn profile and ask questions about it to show that you did some homework and to determine if the description is current and accurate.
- Seek common ground: If you can glean something about their educational background, job history, or interests from their LinkedIn profile, it might merit a comment or question.
- Confirm where the leader is calling from on that day and be ready with a comment or question about the weather or region.
- Explicitly tell them that you've been looking forward to the call and to learning more about their background.

2. How is your energy and engagement coming across?

Beyond building some initial rapport, you need to monitor how your energy and engagement come across. On this front, it's important to acknowledge that some orientation meetings are done purely by phone while others may be on a video call or in person. Here are some thoughts on both:

- If you're purely on the phone, it's crucial that you concentrate heavily on ensuring that your voice conveys energy, curiosity, warmth, empathy, and sincerity.

- If you're on video or in person, voice is still important, but you also need to use eye contact, facial expressions, and body language to convey those same qualities.

If I'm dealing with a leader who initially comes across as negative or guarded, here's what I'm saying to myself:

- "If I keep projecting energy and engagement, I can change their attitude!"
- "Be patient: Sometimes a leader who seems disengaged at first is actually quietly engaged… or just needs steady support and more processing time."

In addition to your voice and body language, it's important to listen actively and react. Depending on your style, this can be done with humor or empathy or inquisitiveness. Let's say you ask a leader about her role, and you get a long list of duties that sound incredibly challenging. Think of how you could react:

- Humor: "Gee, is that all? You really should see if they can find more to keep you busy…"
- Empathy: "That sounds very challenging. How are you able to keep all those balls in the air?"
- Inquisitiveness: "Are you satisfied with this level of responsibility, and is it sustainable?"

Whatever your choice, the subtext is that you're paying attention and that you care about the context.

Another key to showing good engagement is pausing to ask questions when explaining the three documents. The leader's attitude and engagement can shift during the call, especially if they're seeing their data for the first time. Check in with questions to make sure they understand what they're seeing and what they need to do with this information.

3. Are you getting what you need to nail the business context on the next call?

When I've trained people to do these orientation meetings, this is the most common problem that I see. When you're new to these meetings, it can be easy to fall into simply asking the suggested questions and accepting the answers at face value. Alternatively, you may run into a leader who is very verbose on the initial questions without necessarily giving you what you need to understand regarding what's urgent and important for them in their business imperatives.

You really need to come away from this call with two things above all else:

- A clear sense of what business outcomes the leader needs to drive in the coming year, ideally tethered to what the enterprise-wide goals are for the organization
- A meaningful answer to the final question about which areas of leadership the leader would like to focus on in the coming year

Sometimes the first answer you get to those two key questions is a bit of a platitude or a non-answer. If you feel like you're hearing more of a job description rather than an urgent, here-and-now business imperative, you need to press for one here. If not, then you're going to struggle to nail the business context on the next call: Instead, you'll be stuck rehashing what you heard about the leader's role and stakeholders.

4. Are you explaining things without getting drawn into an insights conversation?

As noted earlier, leaders vary dramatically on this call. Some have barely looked at their data, while others have already dug deeply into it. Among the latter, some leaders have a strong action bias and want to jump into dissecting the data on the first call so they can "solve the problems" as soon as possible.

That's not the purpose of this call. Here are some tips for striking the right balance between helping the leader deal with their initial reactions without prematurely diving into an insights conversation:

- **Appreciate that some leaders do need to be "talked off the ledge"**

When a leader is anxious, angry, or fixated on a particular data point, this may threaten their ability to go through the insights preparation process as constructively as possible. For such a leader, it's not sufficient to say, "We'll talk about that on the next call." If you sense that the leader is getting stuck on a real or perceived outlier in the data, a low rating on a particular facet or item, or a negative comment, you will need to help them get "unstuck" without digging too deeply into the data.

- **Acknowledge and normalize what the leader is thinking, feeling, and saying.**

Whatever a leader is feeling, you need to acknowledge that it's legitimate and understandable. In the face of emotional reactions, I often say the following:

- "Just about every leader finds some great news and some things that are troubling or disappointing; what you're feeling is definitely more the rule than the exception."

- "Remember that the ExPI captures the perceptions of others—not your intentions. And the ExPI is a snapshot in time: These perceptions can be changed, often quickly."

- "This is a robust report, and the data can feel overwhelming at first. But I'm going to walk you through a process that will help you make sense of what's in there and what you can do about it."

- **Use language that reduces defensiveness and increases curiosity**

Some leaders will either become defensive or engage in catastrophizing." With the latter, they may say things like the following:

- "Well, I thought I was good at Inclusiveness, but I guess people are saying I'm bad at it."

- "I have so many weaknesses; I hardly know where to start."

- "Based on these results, should I be looking for another job?"

You need to correct people, gently, when they make statements like these. Your use of language here is crucial. Here are some good examples:

- "I would disagree with the notion that you are 'bad' at Inclusiveness. Your high self-rating in that facet tells me that you have an inclusive spirit and intention. What you should be thinking about in preparation for our next call is what's keeping that spirit from 'showing up' or 'coming across' in the perceptions of others."

- "Some of your facets are rated lower than others, and that's true for all leaders. But I wouldn't think of those lower-rated facets as 'weaknesses." Instead, I would encourage you think of them as areas of opportunity. As for where to start, we're going to begin on our next conversation by talking about your strengths, and then we'll tackle three or four facets that seem especially urgent and important given your business context. I can promise you'll come away from the next call with a clear sense of some immediate steps you can take to move the needle on some of these perceptions."

- "Let's emphasize that we're not fixing a broken leader here! You have been very successful in your career to date. Our goal now is to build on your considerable strengths and see if there are a couple of areas where some changes can help you become even more successful."

- **Point the leader to some data points and inspire an "intellectual treasure hunt"**

Another effective strategy in the orientation meeting is to point the leader to some interesting data points in their report. These could include:

- A facet that has an unusually wide range bar
- A facet where one rater group rates the leader much lower than another rater group
- One of the lowest-rated facets or items that seems especially important given the business context or surprising given what you know so far about the leader.

Quite often, I have talked to leaders who seemed marginally engaged at the start of this conversation. But once I highlighted an intriguing data point, I could sense that the gears had started turning and that the leader was curious to understand more. Sometimes I will explicitly tell the leader to think of going through the user's guide as going on an "intellectual treasure hunt." There is real gold in any feedback, and we want to inspire that kind of mindset.

Subtext of the Leader's Behavior in the Orientation Meeting

Meanwhile, you want to be noticing the following as you listen to the leader:

1. **How engaged is the leader in this conversation?**

As I'm listening to the style and content of the leader, I'm asking myself many questions: Do they seem happy to be having this conversation? Are they relatively forthcoming or more guarded? To what degree did they look at the report prior to the call? Do they seem to be tracking with me and reacting appropriately as I give them directions or point them to parts of their report? Basically, you're starting to gauge the ability and willingness of the leader to engage in a real dialogue on the subsequent call.

2. **How are you experiencing the leader's communication style, personality, and attitude?**

I'm a big fan of Irvin Yalom, a renowned psychiatrist who has written extensive nonfiction and fiction about his work with patients. One of his central beliefs is that a psychotherapist can view his relationship with a client as a metaphor for the client's other relationships. The same is true for you in these conversations: Position yourself to notice how the leader's communication style, personality, and attitude land with you, as this may give you some insight into how others experience them.

As the leader answers your questions, note whether they are concise or verbose, clear or convoluted, open or guarded, warm or cold, emotional or rational, and so on. While the leader may not always act the same with you as with a direct report or peer, you often can get an appreciation as to why others perceive the leader as they do. For example, a leader who gives a rambling description of his business imperatives may help you grasp why their ratings are low on the Practical Wisdom item related to cutting through complexity to get to the heart of the matter.

3. **Is the leader's behavior with you consistent with comments and ratings on the report?**

More often than not, you'll find consistency here. A leader who is praised for being caring and warm will often come across similarly with you, for example. What interests me most is when the leader's behavior with me is at odds with others' perceptions. Here are some examples:

- A leader who is called out for being hotheaded or defensive who is highly composed and doesn't react negatively when pointed to more critical data.
- A leader who can clearly explain their business imperatives in strategic and inspiring terms to you who gets low ratings on the Vision facet.
- A leader who is open, curious, and asks great questions of you but has low ratings on these ExPI items.

When you notice these disparities in the orientation meeting, you don't need to call them out immediately. You shouldn't, really. Just hang on to them, as they can be interesting to bring up as observations or insights in the longer conversation.

4. **Does the leader's initial reaction to their data seem appropriate and reasonable?**

There are always surprises in how leaders react to their data. I've had leaders who were very, very upset about their reports—even though their lowest-rated facet was something like a 4.25. I've had other leaders who were unsurprised, cavalier, and even relatively pleased despite having many facets range almost from 1-5 in variability or having several facets rated around 3.0 or lower.

It's not always immediately clear what such reactions really mean. In some cases, leaders are okay with lower scores because they know that's how their culture or their leader tends to grade people. For example, one Fortune 100 CEO who has rated leaders on the ExPI makes it very clear to his direct reports that he likes to give many "1" ratings as well as many "5" ratings. This is because he dislikes ambiguity and likes to be very clear about what's going well and what needs attention. In other instances, I've known leaders who wrote to their raters and encouraged them to be tough graders.

On the other end of the spectrum, you've got leaders who have an almost impossibly high bar for themselves. To be fair, many of them have been successful because it wasn't "okay to be okay" or "good enough to be good enough." They want to be great. You could also say that they are wise enough to know that however much they have accomplished, the journey to being the perfect leader never ends. That's fine as long as they aren't wasting a good deal of time and energy brooding on data points that may not even be all that significant. This can be another example of needing to talk leaders off the ledge.

What about those leaders who are cavalier or dismissive about data that by any objective standard is concerning? My main advice is to resist the urge to pounce on leaders and rub their noses in the data. This is especially important during this first conversation. Leaders may seem to be shrugging off negative data or dismissing it quickly because they believe there is an outlier or some other mitigating circumstance. I tend to let that go during this first conversation. Quite often, the leader will reach new conclusions through the preparation process. If not, usually we can help new insights come to the surface when exploring the development themes and asking questions to help the leader realize that their first impressions may have been inaccurate.

5. What are the implications of the leader's behavior for the insights conversation?

When I'm reviewing my notes from an orientation meeting, I'm always considering how I need to manage my time during the insights conversation:

- If the leader remained relatively disengaged during the call, I might pay extra close attention to the quality of the developmental summary worksheet and to the leader's tone and energy early in the call. I also may need to be ready to channel that much more positive energy and attentiveness to the leader to win them over.

- If the leader is verbose and struggles to get to the point quickly, I will probably ask them to describe only one strength, not two. A verbose leader will also make me more inclined to hit the most important development themes first rather than trying to tee them up by delving into a contributing facet. Likewise, I may decide that a more open-ended, "Socratic" approach in exploring the development themes may be too much of a time risk; I may be better off pointing them to more specific data points.

- With all leaders, I'm listening for levers I can pull and buttons I can push on the subsequent call. Whether the leader tells me that they want to be the next COO, be a better mentor, or show up with a stronger voice when communicating up, I'm going to play back those words during the insights conversation to remind them of why they're motivated to make a developmental change.

While there is plenty to be gained in the text of the orientation meeting, don't just scratch the surface: Dig deep into the subtext to make the most of these conversations.