

1 CENTER YOURSELF AND CLARIFY REALITY

PAUSE → **BREATHE** → **REFLECT**

If strong emotions are present, check in with yourself to understand what's shaping your reaction. Let these questions help you clarify what's happening inside you.

- What part of my emotional response is grounded in facts, and what part might be interpretation?
- Am I making assumptions or filling in blanks with information that may not be accurate?
- Am I taking anything personally, or making something personal that isn't? If so, why?
- Are past experiences coloring my ability to think clearly, stay objective, and focus on the facts of the present situation?
- Am I overstating any fears and allowing them to distort my perception of reality?
(fear of harm, loss, rejection, exclusion, or desperation)
- Am I engaging in any irrational or self-protective narratives that are distorting my view of the situation, minimizing my own role, influence, or responsibility, and undermining my ability to think clearly, stay composed, and engage effectively?

FOOL'S CHOICE

"I can't be honest and maintain the relationship."

Framing the situation as an either/or when a both/and solution is possible. You assume you must choose between two undesirable extremes instead of exploring a balanced, skillful middle path.

VICTIM STORY

"It's not my fault."

Minimizing or ignoring your own contribution to the problem. You cast yourself as the innocent party to avoid discomfort, accountability, or self-examination.

VILLAIN STORY

"It's all their fault."

Exaggerating the other person's flaws, motives, or incompetence. You assume the worst about them while overlooking their possible good intentions, pressures, or limitations.

INADEQUATE / IMPOSTER STORY

"It's all my fault."

Over-owning responsibility due to self-doubt or imposter feelings. You inflate your shortcomings and assume you're the sole cause of the problem, even when the situation is shared or complex.

HELPLESS STORY

"There's nothing I can do."

Believing you have no influence or options. You convince yourself you're powerless, which prevents you from seeing the choices, boundaries, or actions available to you.

With mental maturity and genuine empathy, step outside your own perspective and explore the situation through the experiences of others. Consider:

What impact is this situation having, or is likely to have, on others involved?

Make sure you're gathering all the FACTS with a full awareness and understanding of the following categories:

- ✓ **Known Knowns** Facts you are fully aware of and confident are true.
- ✓ **Other Data Points** Assumptions, interpretations, opinions, speculation, fears, and concerns. These are not facts, but they influence your thinking and should be acknowledged, not treated as truth.
- ✓ **Known Unknowns** Information you know you don't yet have. You may need to seek out the missing data, make a well-informed estimate, or avoid filling in the gaps with assumptions.
- ✓ **Unknown Unknowns** Factors you don't yet know that you don't know (your "Black Swans"). Stay open to the possibility that additional variables or perspectives may emerge.

PURPOSE

2 CHECK YOUR MOTIVES AND ALIGN YOUR INTENTIONS

As you consider how to approach this conversation, stay focused on what matters most and let that clarity guide your decisions and behavior.

In difficult conversations, your **behavior will always reflect your motives**. Use the questions below to **ensure your motives haven't slipped into unproductive agendas**, such as winning, punishing, keeping the peace, or teaching a lesson that can derail a constructive dialogue.

Q1

WHAT OUTCOME AM I SEEKING?

What do I ultimately want to accomplish?

Q2

WHAT DO I WANT FOR:

- *myself?*
- *the other person?*
- *the relationship?*
- *the organization?*

Q3

WHY IS THIS CONVERSATION NECESSARY?

What value will it create for me, my team, or the organization if it goes well?

Q4

IF I TRULY WANTED THESE RESULTS, HOW WOULD I THINK AND BEHAVE DURING THIS CONVERSATION?

*Who do I want to be in this moment?
How would the version of me that I'm becoming handle this?*

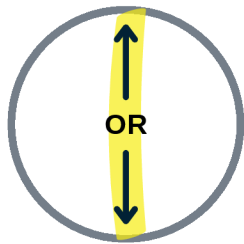
STRATEGY

3 PLAN YOUR APPROACH WITH INTENTION AND CARE

After deciding who should be included in the discussion, use your experience with each person to clarify their preferred communication and engagement style.

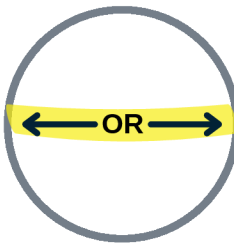
- 1 Consider whether this person tends to be more:
- 2 Then, consider whether this person also tends to be more:
- 3 Now, combine this person's tendencies to determine their DiSC Style.

FAST-PACED & OUTSPOKEN



CAUTIOUS & REFLECTIVE

QUESTIONING & SKEPTICAL



ACCEPTING & WARM



DOMINANCE

PRIORITIES

- results
- action
- challenge

FEARS

- failure
- appearing weak
- being taken advantage of

DEFAULT STYLE

- pushes for results
- shows decisiveness
- displays confidence
- conveys urgency
- speaks up about problems

BOTHERED BY

- wasted time
- small talk
- too many details
- indecisiveness
- lack of control
- challenges to authority

INFLUENCE

PRIORITIES

- enthusiasm
- action
- collaboration

FEARS

- rejection
- criticism
- being ignored

DEFAULT STYLE

- generates enthusiasm
- creates a lively environment
- eager to get things moving
- gets everyone involved
- connects well with others

BOTHERED BY

- dull or dry analysis
- too many details
- cold or detached people
- loss of approval
- negativity or pessimism

CONSCIENTIOUSNESS

PRIORITIES

- accuracy
- stability
- challenge

FEARS

- being wrong
- low quality / inaccuracies
- emotional outbursts

DEFAULT STYLE

- strives for reliability
- ensures accuracy
- provides logical analysis
- thoroughly questions ideas
- maintains high standards

BOTHERED BY

- emotional or illogical people
- personal questions
- overly enthusiastic presentations
- pressure
- emotional appeals

STEADINESS

PRIORITIES

- support
- stability
- collaboration

FEARS

- rapid change
- upsetting others
- loss of harmony

BOTHERED BY

- high pressure
- sudden change
- pushy people
- uncertainty
- unpredictability
- conflict

DEFAULT STYLE

- team player
- listens and provides support
- patient, calm, and tactful
- accommodating of different people and ideas
- strong pulse on team engagement and dynamics

Using the information below and from the previous page, consider how you might adjust your approach to engage more effectively in this conversation.

INTERACTING WITH THE DOMINANT STYLE

When Trying to Connect:

Make efficient use of time, get right to the point, expect candor

Strategies:

- Use a confident and no-nonsense approach
- Get to the point
- Give them options and a sense of control
- Convey respect for their authority
- Show a desire to help them get immediate results

Emphasize:

- Immediate outcomes
- The bottom line
- Efficiency, ease of use
- Profits, savings

When Problems Need to be Solved:

Tackle problems boldly, avoid sugar-coating and over-analysis

When Things Get Tense:

Face issues quickly and directly, avoid taking bluntness personally

INTERACTING WITH THE INFLUENCE STYLE

When Trying to Connect:

Convey enthusiasm, make a personal connection, be collaborative

Strategies:

- Use an upbeat and lively approach
- Give them a chance to tell their stories
- Be open to disclosing information about yourself
- Show empathy for their concerns
- Demonstrate how your offering helps other people

Emphasize:

- Testimonials
- Ease of use
- Exciting opportunities
- How your offering makes them look good

When Problems Need to be Solved:

Remain optimistic, be open to change, expect spontaneity

When Things Get Tense:

Stay calm, acknowledge their feelings, avoid personal attacks

INTERACTING WITH THE CONSCIENTIOUSNESS STYLE

When Trying to Connect:

Focus on the facts, avoid pushing them, expect skepticism

Strategies:

- Use an objective approach
- Slow down and discuss the details
- Have evidence to back up your claims
- Use logic to connect solutions to their problems
- Give them a chance to show their knowledge

Emphasize:

- Quality, high standards
- Your expertise
- Logical reasons
- Evidence of reliability

When Problems Need to be Solved:

Show appreciation for their logic, but don't let them get bogged down in the details

When Things Get Tense:

Allow them time to process, avoid becoming forceful or emotional

INTERACTING WITH THE STEADINESS STYLE

When Trying to Connect:

Show warmth, take an easygoing approach, be collaborative

Strategies:

- Use a casual and low-pressure approach
- Show warmth and sincerity
- Present information in a step-by-step manner
- Allow them space and time to process information
- Provide reassurance

Emphasize:

- Ongoing support
- Examples from the past
- Stability and security
- Warranties, service plans, and guarantees

When Problems Need to be Solved:

Respect their caution, acknowledge people's needs, agree on a timeline

When Things Get Tense:

Practice patience and diplomacy to avoid shutting them down

Professional Readiness for Critical Conversations



Determine the best time and place for this conversation. Evaluate the pros and cons of your options, as well as the factors that may influence everyone's mindset and engagement.

TIMING

What is the ideal time to initiate this discussion? Consider the **best day of the week** and **time of day** to ensure everyone is in the right headspace for a productive conversation.

METHOD

In-person, virtual meeting, phone conversation, text, messaging platform, email, group communication, etc.

LOCATION/ENVIRONMENT

Private setting, public setting, group meeting, onsite, offsite, your office, their office, neutral space.

Create a loose outline for how you want to facilitate the discussion.

How will I:

- A. **Initiate and set the stage** for the discussion?
- B. **Facilitate the dialogue** in a way that keeps it focused, respectful, and productive?
- C. **Move the conversation into action** with clear agreements, deliverables, and timelines for follow-up?

THINGS TO CONSIDER

SHARE YOUR PERSPECTIVE

Using logic and reason, engage in a discussion about what is happening and why.

1. *What will I say?*
2. *How will I say it?*

- word choice
- tone, pace, pitch, volume
- facial expressions
- body language
- physical energy



INVITE THEIR PERSPECTIVE

The goal is to get all relevant information out into the open, including opinions, concerns, data, facts, and ideas.

1. *How will I invite their thoughts, observations, concerns, stories, and relevant information?*
2. *What questions will I ask?*
3. *Why am I asking them?*
What do I want to achieve?
 - gain insight
 - deepen understanding
 - gather information
 - encourage strategic thinking
 - ensure they feel heard and understood
4. *How will I ask them?*

ANTICIPATE CONCERNS

What concerns or objections might they have, and how will I address them?

PREPARE FOR 'TESTING'

How will I invite opposing views and model healthy disagreement by playing devil's advocate with all perspectives shared, including my own?

CREATE THE CONDITIONS FOR TRUST TO EXIST

How will I establish and maintain trust throughout the conversation? How will I reinforce mutual purpose and demonstrate balanced respect and empathy as the conversation unfolds?