# **Developing the Intentional Mindset: Worksheets**

**Introduction**

The purpose of this book of worksheets is to help 21st century workers build awareness and competency as autonomous knowledge workers. Autonomous knowledge workers build value for themselves and for their organizations. Individual productivity and organizational performance are strengthened to increase collaboration and new value creation. Knowledge workers are satisfied and motivated as they strive for success.

Building an autonomous mindset enables knowledge workers to maximize performance and build their organization’s growth efforts. They recognize their independence, as well as their dependence on others to complement their expertise. Factors that influence this growth include employee growth mindsets and organizational support for that growth. When there is a community mentality of growth and autonomy, organizations benefit from the thinking of all members, as opposed to the thinking of just one leader. Growth is exponentially more feasible when all work together toward that growth.

Worksheets that facilitate growth planning are grouped according to book and chapter concepts. References to relevant chapter are included for easy reference to concepts explored. The following modules are included:

Module 1: Understanding the Knowledge Economy

Module 2: Understanding Mindset

Module 3: Setting Goals and Values

Module 4: Setting Beliefs and Mode of Work

Module 5: Using a Learning System

Module 6: Reflecting and Celebrating

Module 7: Building an Autonomous Environment

Worksheets are presented with a sample for context and a working template to complete based on one’s specific needs. The definition, purpose, and outcome are described, along with their connection to other worksheets.

Worksheets will ensure autonomous work if completion is based on research into relevant data and information, its analysis, and evaluation. Expectations of outcomes and benefits should be determined prior to completion so that work is focused in that direction. Once completed, one should check on the planning with a reflective review of the feasibility of that work, planning next steps, and a time for the next check in on this work.

The sample worksheets were completed by a representative knowledge worker, Sidney Glass. Sidney is a new employee, who is navigating her orientation and integration into a human resources design firm, Culture ABC. This organization is focused on helping client companies create an autonomous organization to maximize individual productivity and company performance for growth. The company serves the technology and pharmaceutical industries. Her position is defined as a Director of People and Culture. This is a new position so her work and its context are ready for her to explore. The company founder would like to simulate the organization that they are seeking to create for their client companies. These sample templates will describe her efforts as context for your own work.

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**Module 1: Understanding the Knowledge Economy**

**Reference Chapter 1. The Knowledge Economy**

***Your Knowledge Economy***

Definition: to observe and describe knowledge economy considerations

Purpose: to ensure availability of knowledge economy facilitators

Outcome: awareness and availability of knowledge economy facilitators

Connection to other worksheets: in support of all other knowledge work worksheets

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Knowledge Economy Considerations*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Inquiry and research skills | Inquiry and research training; recognition and reward for inquiry and research outcomes | All employees, network, and mentors |
| Expectations on decision-making | Decision-making protocols and parameters defined |
| Awareness of mindset | Mindset training and social discussions |
| Use of economic and emotional quantifiers and qualifiers | Economic quantifier and qualifier training; digital nervous system of data and information |

Your Worksheet:

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| --- | --- | --- |
| ***Knowledge Economy Considerations*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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***Global Economy***

Definition: to build awareness of global trends and events

Purpose: to be able to leverage global trends and events for avoiding obstacles and finding new opportunities

Outcome: awareness for security and opportunity

Connection to other worksheets: input to reflection and opportunity analysis worksheets

Sidney’s Worksheet:

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| --- | --- | --- |
| ***Global Trend or Events*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Pharmaceutical pricing | Increase or decrease in profits | Investors |
| Drug availability | Building negative narrative  | Consumers |
| Employee tendencies for remote work | Increase in infrastructure costs, decrease in real estate costs | Employees and their skills; owners’ costs |
| Availability of technology-skilled employees | Decrease in services offered; increase in salaries offered | Education institutions; emerging workforce; employers |
| Supply chain delays | Increased delivery times and costs | Consumers, company narrative creators |
| Need for customized technology solutions | Increased client satisfaction and revenue | Expert technologists, company technology staff, customers |

Your Worksheet:

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| --- | --- | --- |
| ***Global Trend or Events*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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***Regional Economy***

Definition: build awareness of regional events and trends

Purpose: to provide information that may avoid an obstacle or lead to an opportunity

Outcome: contemplation that will build sustainability

Connection to other worksheets: provides research and input for other worksheets that are structuring for pivots

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Regional Economy Considerations*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Transit and location impact | Need to motivate employees to counter longer delivery schedules | Employees, customers |
| Competitive activity | Need to lower prices | Company budgeters |
| Technological advances | Increased production expectations | Employees, budget holders |
| Weather restraints | Access to energy or routes | Employees, customers, customers’ customers, budget holders |
| Energy restraints | Internet unavailability | Employees, customers, customers’ customers |

Your Worksheet:

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| --- | --- | --- |
| ***Regional Economy Considerations*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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***Local Economy***

Definition: to observe local environment and its potential impact

Purpose: to act on environmental conditions to leverage or contain their impact

Outcome: managed environmental conditions and their impact

Connection to other worksheets: to define projects to explore, leverage, or contain impacts

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Local Economy Considerations*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Competitors | Pricing impacts | Employees, customers |
| Economic support for roads, etc. | Attractiveness to employees, access to customers | Employees, customer relations |
| Transit availability | Attractiveness to employees, access to customers | Employees, customer relations |
| Customer company cut-backs | Less customer contracts/work | Employees, owners |

Your Worksheet:

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| --- | --- | --- |
| ***Local Economy Considerations*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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***Assessing Your Autonomy***

Definition: to build awareness of your autonomy and your control of activities

Purpose: to design and use your autonomy for positive outcomes

Outcome: your control of life’s events and situations for your best destiny

Connection to other worksheets: defines your needs when problem solving or creating value

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Autonomy Considerations*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Inquiry | Theory Y and Theory Z | Managers, leaders, knowledge workers |
| Learning – 5 Whys | Answer availability |
| Learning - 7 levels of thinking | Digital nervous system needed |
| Decision-making – economic and emotional factors of evaluation for quantity and quality | Decision-making defined with protocols and parameters, economic and emotional training on evaluation factors |

Your Worksheet:

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| --- | --- | --- |
| ***Autonomy Considerations*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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***Assessing Organizational Autonomy***

Definition: to observe organizational support for autonomy of knowledge workers

Purpose: to build support for autonomous work

Outcome: decision-makers are supported in order to make good decisions

Connection to other worksheets: defines and clarifies needs to support autonomy in project work

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Organizational Autonomy Considerations*** | ***Impact to Sidney’s Company*** | ***Stakeholders*** |
| Shared vision, mission, values, goals, and mode of work | Define company narrative, build infrastructure to share stories for community building | Owners, leaders, managers, knowledge workers |
| Employee profiles for networking and mentoring | Facilitate employee profile sharing |
| Job descriptions and training to support growth goals | Confirmation of responsibilities, accountabilities, and goals; availability of relevant training |
| Access to social experiences to build trust and relationship | Organizing and scheduling social exchanges and experiences |
| Access to digital nervous system using decision rationale for research toward decision making | Structured inquiry, parameters for decision making, 7 levels of analysis tied to the knowledge pyramid  |
| Recognition and reward for autonomous work and results | Structure and parameters for recognition and rewards  |

Your Worksheet:

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| --- | --- | --- |
| ***Organizational Autonomy Considerations*** | ***Impact to You or Your Company*** | ***Stakeholders*** |
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**Module 2: Understanding Mindset**

**Reference: Chapter 2. Defining Mindset Components**

***Underlying Mindset of Autonomy: Goals, Values, Beliefs, Mode of Work***

Definition: to define yourself and recognize your mindset

Purpose: to understand yourself so that you are able to maximize your value

Outcome: a motivated, maximized, and self-actualized self

Connection to other worksheets: gives background for matching your mindset to stakeholders and your organization

Sidney’s Worksheet:

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| ***Mindset Profile: A person who is eager to support others in sustaining their own growth*** |
| Your expertise | People development |
| Value proposition | Helping people find their strengths, passions, and activities to leverage them for growth |
| Experiences | Summer camp counselor, tutoring, babysitting, social activity organizer for small technology company, goals coordinator for large teams, job search coach for university career center, training coordinator for pharmaceutical company |
| Goals: vision, mission, personal, professional, community, expertise, performance and learning for each | Personal: build a narrative of a competent person who helps people achieve their desired resultsVision: to enable others for maximizing their potentialMission: to initiate self-development projectsPerformance: to support 10 people per business cycleLearning: understanding mindsets to build trust for successful development |
| ProfessionalVision: to support a learning organizationMission: to engage others in learning projectsPerformance: amount of new value creation for the organizationLearning: researching and introducing discussion opportunities for growth |
| CommunityVision: build a community mindset of learning and developmentMission: structure social experiences for relationship buildingPerformance: employee growth and retentionLearning: exploring employee passions and strengths for maximizing value |
| ExpertiseVision: to build a narrative of an expertMission: to build that persona through individual support projectsPerformance: build a following of 15 people per yearLearning: exploring others’ needs for self-confidence and achievement |
| Values | Compassionate, goal-driven, individual value seeking, self-sustainability |
| Beliefs | Positive reinforcement, find positivity in everyone, education gives an advantage, failure is self-imposed |
| Mode of Work | Work with others, test others’ beliefs, matcher of giving and taking, give continuous chances to learn and achieve, accountability with no delusions, analyze with data |
| Growth plan | To grow to a senior level of contribution to influence others who help with people development |
| Passion | Seeing others achieve |
| Narrative | A motivator and supporter of the individual and common good |
| Mentoring Certifications | Budgeting, communications, economic decision-making, mindset awareness and decisions, narrative development |
| Support of collaborators | Building trust and relationship with customers to engage them in helping others achieve |

Your Worksheet:

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| --- |
| ***Mindset Profile:*** |
| Your expertise |  |
| Value proposition |  |
| Experiences |  |
| Goals: vision, mission, personal, professional, community, expertise, performance and learning for each | PersonalVision:Mission:Performance:Learning: |
| ProfessionalVision:Mission:Performance:Learning: |
| CommunityVision:Mission:Performance:Learning: |
| ExpertiseVision:Mission:Performance:Learning: |
| Values |  |
| Beliefs |  |
| Mode of Work |  |
| Growth plan |  |
| Passion |  |
| Narrative |  |
| Mentoring Certifications |  |
| Support of collaborators |  |

***Aligning Behavioral Tendencies and Decisions to Mindset***

Definition: to clarify the alignment between your behaviors and decisions to your mindset components

Purpose: to be able to define and realign behaviors, decisions, and mindset

Outcome: behaviors, decisions, and mindset for best destiny

Connection to other worksheets: provide clear input to other clarifications on mindset and growth optimization

Sidney’s Worksheet:

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| ***Behavior or Decision*** | ***Alignment to Goal, Value, Belief, Mode of Work*** | ***Change needed for True Alignment*** |
| Joined a professional HR association | Individual value seeking, self-sustainability | Define and share specific value to be gained |
| Held an open discussion on pros and cons of employees’ workday | Understand others’ beliefs | Work with others, test beliefs, open the discussion for all to comment on each other’s beliefs |
| 24-hour delay in email responses | Allow time to think before responding  | Matcher of giving and taking by sharing the reason for the delay to think before responding |
| Engaged an angry employee | Understand the reason for the anger | Look for the positive alignment in that person’s views, goals, values, and mode of work |
| Cancelled a scheduled vacation due to unrest | Prevent the unrest from growing | Establishing self-sustainability with reflection and compromise |

Your Worksheet:

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| --- | --- | --- |
| ***Behavior or Decision*** | ***Alignment to Goal, Value, Belief, Mode of Work*** | ***Change needed for True Alignment*** |
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***Organizational Profile for Mindset, Individual Narrative, Network, and Growth***

Definition: to define and recognize your organization’s mindset

Purpose: to understand your environment so that you are able to maximize your value

Outcome: motivated, maximized, and self-actualized individuals and organization

Connection to other worksheets: gives background for matching your mindset to your organization

Sidney’s Worksheet:

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| ***Organizational Mindset Profile: To help companies ensure their success through culture development that is designed and implemented by the company itself*** |
| Expertise | Understand and develop high performing cultures |
| Value proposition | Helps leaders and knowledge workers maximize customer’s performance toward sustainability and growth |
| Experiences | Building awareness and commonality of mindset, increasing revenue, increasing retention of employees and customers, motivating environments for technology and pharma industries  |
| Goals: vision, mission, individual, business, community, expertise, performance and learning for each | IndividualsVision: to foster individual employee growthMission: to initiate projects that engage individual strengthsPerformance: high retention rateLearning: exploring the comprehensive body of strengths and interests within the organization. |
| BusinessVision: to capture majority of market share in two industriesMission: to engage referral sources to acquire new customersPerformance: to increase market share by 5% per yearLearning: to uncover customer needs to identify relevant and new products and services |
| CommunityVision: to be recognized as a leader in the marketMission: to engage market members in social experiences and exchanges that build awareness of valuePerformance: to increase participation and inquiry in sharing market stories, events, and trendsLearning: to build personal trust and relationships that uncover customer interests and passions |
| ExpertiseVision: to have a narrative of the “go to” expert providerMission: to build that persona and share through industry service projectsPerformance: build a following of 50 industry participants per yearLearning: understand the urgent and important industry needs through social events and experiences |
| Values | Customer growth, company growth, narrative strength, employee growth, new domains of value, transparency |
| Beliefs | Customers, company, and individuals have untapped strengths and value, growth is to be rewarded, support for growth is essential, failed attempts for growth are learning opportunities, openness to sharing |
| Mode of Work | Openness to sharing, parameters for decisions, goals, and behaviors, Theory Y and Z, budget allocation to support growth endeavors, observing and rewarding managed risk-taking, use of a learning system and project structures |
| Growth plan | The responsibility and accountability of all organizational members |
| Passion | Engagement for growth |
| Narrative | Seeking to understand true needs so efforts are absolutely relevant and uncompromised for true value |
| Components of autonomy | Inquiry, learning, decision-making, communication, mindset awareness |
| Support of collaborators | Partnerships, internal and external, are valued and supported for most productive work |

Your Worksheet:

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| --- |
| ***Organizational Mindset Profile:*** |
| Expertise |  |
| Value proposition |  |
| Experiences |  |
| Goals: vision, mission, individual, business, community, expertise, performance and learning for each | IndividualsVision: Mission: Performance: Learning:  |
| BusinessVision: Mission: Performance:Learning:  |
| CommunityVision: Mission: Performance: Learning:  |
| ExpertiseVision: Mission: Performance: Learning: |
| Values |  |
| Beliefs |  |
| Mode of Work |  |
| Growth plan |  |
| Passion |  |
| Narrative |  |
| Components of autonomy |  |
| Support of collaborators |  |

***Stakeholder Profiles for Mindset, Narrative, Needs, Network, and Growth***

Definition: to define and recognize your stakeholders’ mindsets

Purpose: to understand stakeholder environments so that you are able to accommodate stakeholder needs

Outcome: a motivated, maximized, and self-actualized relationship of trust with stakeholders

Connection to other worksheets: gives background for matching your mindset to stakeholders’ mindsets

Sidney’s Worksheet:

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| ***Stakeholder Mindset Profile: A company focused on the specific needs of customers and their customers*** |
| Expertise | Customizing technology solutions |
| Value proposition | Helping their customers with measured efficiency and effectiveness of operations through streamlined technology |
| Experiences | Education institutions, healthcare providers, pharma developers, team performance toward their goals |
| Goals: vision, mission, individual, business, community, expertise, performance and learning for each | IndividualsVision: employee retentionMission: projects to provide satisfiers and motivators Performance: 90 percent retentionLearning: clarifying satisfiers, motivators, and individual growth needs |
| BusinessVision: to foster a reputation to build customer sustainability using growth indicatorsMission: to focus projects on improving efficiency and effectiveness of the work of customer organizationsPerformance: improve performance by 20 percent for each customer organizationLearning: using archetype workflow analysis to uncover gaps and overlaps needing improvement |
| CommunityVision: building recognition of improvement techniques for common use in technology solutionsMission: using projects to develop a model for improving efficiency and effectivenessPerformance: hosting monthly discussions to share improved technology solutionsLearning: recording and sharing stories for further discussion and connections for new learning |
| ExpertiseVision: build a global reputation for customized technology solutionsMission: initiate projects that integrate international technology standards and protocols for improvement of efficiency and effectivenessPerformance: client relationships with 50 global organizationsLearning: establish global relationships to uncover specific needs |
| Values | Efficiency, effectiveness, metrics, global services, positive narrative |
| Beliefs | Universal need for efficiency and effectiveness, importance of self-sustainability, technology as essence of efficiency and effectiveness |
| Mode of Work | Data and information driven-work, engagement of users, use of metrics, recognition of new value, sharing of relevant work and improvements |
| Growth plan | Global and national recognition of their capability to improve efficiency and effectiveness, leading to increased customer base regularly |
| Passion | Helping customer organizations sustain themselves and grow |
| Narrative | Always improve their customer’s performance |
| Support of collaborators | Engagement, integration, and sharing of customer learnings among all collaborators and partners |

Your Worksheet:

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| --- |
| ***Stakeholder Mindset Profile:*** |
| Expertise |  |
| Value proposition |  |
| Experiences |  |
| Goals: vision, mission, individual, business, community, expertise, performance and learning for each | IndividualsVision: Mission: Performance: Learning:  |
| BusinessVision: Mission: Performance: Learning: |
| CommunityVision: Mission: Performance: Learning:  |
| ExpertiseVision: Mission: Performance:Learning:  |
| Values |  |
| Beliefs |  |
| Mode of Work |  |
| Growth plan |  |
| Passion |  |
| Narrative |  |
| Support of collaborators |  |

***Relevant Industry Mindsets***

Definition: understand diverse industry mindsets and needs

Purpose: to establish trust and relationships between relevant industries based on customer environments

Outcome: ability to approach customers in the context of their specific industries and mindset needs

Connection to other worksheets: to add awareness of customer mindset needs within workflows

Sidney’s Worksheet:

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| --- | --- | --- |
| ***Your Industry and Mindset*** | ***Customer, Stakeholder Industries and Mindsets*** | ***Connections between Industries*** |
| Human Resources: people and growth | Technology: automation, self-sufficiency, metrics | People capabilities: inquiry, decision-making analysis, research, learning, mindset analysis, metrics, finding and evaluating new opportunities |
| Pharma: data-driven, low emotional input, validation |

Your Worksheet:

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| --- | --- | --- |
| ***Your Industry and Mindset*** | ***Client, Stakeholder Industries and Mindsets*** | ***Connections between Industries*** |
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***Community Mentality: Stories and Social Experiences***

Definition: developing a common platform of thinking to guide work and decisions

Purpose: to facilitate trust and relationships leading to high performance

Outcome: efficient and effective knowledge work for motivation and performance

Connection to other worksheets: background for other worksheets that require awareness of mindset and its needs

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Mindset*** | ***Community Behaviors and Decisions*** |
| Goals: build value for clients | Engage in trust building and identifying value to be created |
| Values: understand mindset and needs, seeking trust | Mindset inquiry for matching needs with facilitating approach |
| Beliefs: autonomy, and collaboration can be facilitated with the right environment | Using processes, protocols, and resources to enable autonomy and collaboration, making decisions accordingly |
| Mode of Work: research, collaboration, recognition, and reward | Inquiry with relevant research, learning, data driven decisions, overt recognition and use of an inquiry process |

Your Worksheet:

|  |  |
| --- | --- |
| ***Mindset*** | ***Community Behaviors and Decisions*** |
| Goals: |  |
| Values: |  |
| Beliefs: |  |
| Mode of Work: |  |

**Module 3: Setting Goals and Values**

**Chapter Reference: Chapter 5. Profiling Yourself, Organization, and Stakeholders**

***Goals and Values Alignment***

Definition: goals and values that support each other

Purpose: to test and adjust for alignment

Outcome: work guided by consistent thinking

Connection to other worksheets: goals and values providing context for all work

Sidney’s Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Goals*** | ***Leading to or Deriving from…*** | ***Values*** | ***Match?*** |
| To relate to stakeholders |  | Compassionate | Match |
| To support a learning organization |  | Goal-driven | Match with specific goals added |
| To build community mindset |  | Individual value seeking | No match |
| To build a narrative of an expert |  | Self-sustainability | Match |

Your Worksheet:

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| --- | --- | --- | --- |
| ***Goals*** | ***Leading to or Deriving from…*** | ***Values*** | ***Match?*** |
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***Hierarchy of Goals***

Definition: incremental goals that add up to the highest level goal

Purpose: to facilitate meeting longer term goals by building persistence and perseverance with smaller incremental goals

Outcome: meeting incremental in service to meeting longer term goals

Connection to other worksheets: integrates into the project plan structure with incremental milestones for moving project to its final goal

Sidney’s Worksheet:

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| --- | --- | --- | --- |
| ***Highest Goal*** | ***6 Month Goal*** | ***2 Year Goal*** | ***5 Year Goal*** |
| To build a relationship | Research and define opportunities to relate, build stakeholdership for trust | Hold two team leadership positions | Hold one higher level leadership position |
| To support learning organization | Develop a plan for learning organization components to be built, build stakeholdership for trust | Create four learning organization components with infrastructure, recognition, and rewards | Create all learning organization components needed for an autonomous environment |
| To build community mindset | Define elements of the community mindset, create a program plan to engage stakeholders | Implement the community mindset in all of the areas of your leadership and learning organization | Establish routine story sessions to reinforce the community mindset and refine as changes deem necessary |
| To build the narrative of an expert | Define the artifacts of your expertise, plan to demonstrate those artifacts as often as possible | Establish five artifacts of your expertise, test their credibility with stakeholders | Develop a routine evaluation of your narrative to ensure its continued strength |

Your Worksheet:

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| --- | --- | --- | --- |
| ***Highest Goal*** | ***6 Month Goal*** | ***2 Year Goal*** | ***5 Year Goal*** |
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***Aligning Individual Goals and Values to Organizational and Stakeholder Goals and Values***

Definition: to ensure alignment of mindset context

Purpose: to adjust goals and values to align for best decisions and success

Outcome: efficient and effective work among stakeholders

Connection to other worksheets: foundational context for all learning and project work

Sidney’s Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Individual Goals*** | ***Organizational Goals*** | ***Stakeholder Goals*** | ***Modify to Match*** |
| To build relationships | To foster employee growth | Employee retention | Match |
| To support a learning organization | Gain majority of market share in two markets | Reputation for customer sustainability and growth | Match |
| To build a community mindset | Recognized as leader in the markets  | Recognized for modeling improved technology solutions | Match |
| To build a narrative as an expert | Hold narrative as the “go to” provider | Global reputation for custom technology solutions | Match |
| Compassionate | Customer, company, employee growth | Efficiency and effectiveness | Compassion might conflict with efficiency.  |
| Goal-driven | Narrative strength | Positive narrative | Match |
| Seeking individual’s value | Transparency | Metrics | Match |
| Self-sustainability | Developing new value domain | Global services | Match but in different contexts |

Your Worksheet:

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| --- | --- | --- | --- |
| ***Individual Goals*** | ***Organizational Goal*** | ***Stakeholder Goals*** | ***Modify to Match*** |
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**Module 4: Setting Beliefs and Mode of Work**

**Chapter Reference: Chapter 6. Connecting Goals and Values to Beliefs and Mode of Work**

***Theory X. Y, Z for Leaders***

Definition: possibilities for managing employee behaviors and decisions

Purpose: to build an organization that sparks autonomous thinking

Outcome: autonomous work facilitating individual and organizational growth

Connection to other worksheets: input to the mode of work components

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Theory*** | ***Facilitators*** |
| Theory X – leader defines all work and decisions | Employees are assigned to teams. Teams are given assignment, results expected, and schedule for completion. |
| Theory Y – worker is enabled by leader to design work and make decisions | Team members are free to design work, assign specific tasks, and advise leader on the results and schedule for completion. |
| Theory Z – employee development is enabled by leader and organization | Employees can join certain teams that are focused on individual and organizational growth and development. Resources are made available for supporting growth efforts. Employees determine what and how growth is pursued. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Theory*** | ***Facilitators*** |
| Theory X – leader defines all work and decisions |  |
| Theory Y – worker is enabled by leader to design work and make decisions |  |
| Theory Z – employee development is enabled by leader and organization |  |

***Resource Allocation and Budgeting for Knowledge Work for Leaders***

Definition: budgeting for new value creation

Purpose: to ensure that new value is supported

Outcome: systematic and routine new value creation

Connection to other worksheets: input into the learning system economic quantifying of new opportunities

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Knowledge Work Resources*** | ***Budget*** | ***When to Adjust*** |
| Research, digital nervous system | 10 percent of net revenue | New information or knowledge on potential outcomes, economic quantification |
| Employee efforts | 10 percent of employee base |
| Integration into organization | 5 percent of employee time |
| Team creation | 5 percent of team members’ time |
| Social experiences | $200 per month for two experiences |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Knowledge Work Resources*** | ***Budget*** | ***When to Adjust*** |
| Research, digital nervous system |  |  |
| Employee efforts |  |  |
| Integration into organization |  |  |
| Team creation |  |  |
| Social experiences |  |  |

***Members’ Satisfiers and Motivators for Leaders***

Definition: to provide satisfiers and motivators that impact retention

Purpose: to motivate and satisfy employees

Outcome: retained employees with employee growth

Connection to other worksheets: input to design of an autonomous environment

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Satisfiers*** | ***Descriptions*** |
| Compensation | Competitive plus 5 percent |
| Work space | Individual desk, printer, computer; group restroom, cafeteria, lounge for socializing |
| Company policy | Vacation, health care insurance, sick allowances, remote work as needed, retirement savings plan |
| Relationship with supervisor | More time availability needed |
| ***Motivators*** | ***Descriptions*** |
| Profiling | Availability of peer and partner backgrounds |
| Growth opportunities | Project reviews every three months for feedback, mentoring for considerations of next step opportunities |
| Recognition | Progress posted in public recognition blog |
| Responsibility | Plan and measured progress toward goals |

Your Worksheet:

|  |  |
| --- | --- |
| ***Satisfiers*** | ***Descriptions*** |
| Compensation |  |
| Work space |  |
| Company policy |  |
| Relationship with supervisor |  |
| ***Motivators*** | ***Descriptions*** |
| Profiling |  |
| Growth opportunities |  |
| Recognition |  |
| Responsibility |  |

***Mentor and Mentee Support***

Definition: mentors and mentees contribution to each other’s growth

Purpose: to align mentors and mentees

Outcome: supporting infrastructure for mentoring efforts

Connection to other worksheets: contribution to the design of an autonomous workplace

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Mentoring Available*** | ***Certified Mentor -*** Peer employee with relevant experiences as certified in profile | ***Mentee and Need -*** Employee request for mentoring |
| Goal development | Team coordinators | Sam |
| Mode of work defined | Self | Jill |
| Reflection support | Technology leader | Martin |
| Finding growth opportunities | Marketing leader | Julian |
| Narrative development | Founder | Mary |
| Communication processes | Executive leaders | Theo |
| Digital nervous system use | Technology expert | Elliott |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Mentoring Available*** | ***Certified Mentor -*** Peer employee with relevant experiences as certified in profile | ***Mentee and Need -*** Employee request for mentoring |
|  |  |  |
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***Decision-making and Communication Protocols and Guidelines***

Definition: sets expectations for common behaviors and decisions

Purpose: enables all members to communicate and make decisions in a consistent and expected manner

Outcome: clarity of work and relationships eliminates obstacles and wasted resources and time

Connection to other worksheets: designs input and support for inquiry and workflow analyses

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Decisions*** | ***Protocols and Guidelines*** |
| Return on investment | Transparency of expectations, 10 percent on small projects, 5 percent on large projects |
| Resource allocation | All workers can lend 10 percent of their time to a project of interest. |
| Team member invitations | Roles defined, open to applications |
| New opportunity considerations | Proposal submitted including description, target audience, benefits, costs, return on investment, rationale toward growth, additional research needed |
| Beliefs | Comprehensive work, preparation, consider all views, growth prioritized, partnerships optimized |
| Mode of work, timeframes, operations | Vote of confidence determinations, deadlines sacred, communications and decisions follow protocols and guidelines, team membership qualifiers, use of profiles to find resources |
| Communication | Continuous updating, using conversation starters to build trust and relationship, RRRR stages, relevant style, and communication modes |

Your Worksheet:

|  |  |
| --- | --- |
| ***Decisions*** | ***Protocols and Guidelines*** |
| Return on investment |  |
| Resource allocation |  |
| Team member invitations |  |
| New opportunity factors |  |
| Beliefs |  |
| Mode of work, timeframes, operations |  |
| Communication |  |

***Organizational Goals, Metrics, and Measures for Leaders***

Definition: consistent measurement toward defined metrics for decision-making

Purpose: to build metrics and measures into all work to set performance expectations

Outcome: adherence to performance levels and desired outcomes

Connection to other worksheets: provides context for performance expectations on workflows and desired outcomes

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Organizational Goals*** | ***Metrics*** | ***Measures*** |
| Employee growth | Achieve one new skill per year | Certification requirements in specific skill |
| Majority market share in two industries | Over 60 percent market share | Track number of customer companies in context of each industry |
| Recognition as leader in each market | Leader recognition by 75 percent of industry companies | Survey of companies in each industry recognizing Culture ABC as leader, building to 75 percent |
| Narrative as “go to” expert provider | 90 percent awareness of expertise by technology industry participants | Survey results that track to industry awareness, building to 90 percent |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Organizational Goals*** | ***Metrics*** | ***Measures*** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

***Brainstorming. Brainsteering, and Mind Mapping Processes***

Definition: structured processes to identify opportunities for improvement or new value creation

Purpose: to provide a continuous stream of ideas for quantifying and qualifying

Outcome: new value creation options always available

Connection to other worksheets: input to the learning system options for evaluation

Sidney’s Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Process*** | ***Discuss*** | ***Test:***Scale from 1 (low) to 10 (high):UrgencyImportanceFeasibility | ***Conclude*** |
| Brainstorming – broad exploration of growth options | Global, national, regional conditions for culture needs | Research U9, I8. F6Production U10. I3. F5Sales U2, I4, F3 | Global options for sharing research scored highest, needing ability to work across borders efficiently. |
| Brainsteering – specific topic exploration of growth options | Technology and Pharma conditions for culture needs | Partnerships U6, I7, F2Acquisitions U1, I2, F2Technology services U8, I8, F6 | Pharma option for development partnerships scored highest, facilitated by customized technology.  |
| Mind Mapping – connect and integrate identified options for growth  | Related culture needs to integrate and create a growth option | Stakeholdership U10, I9, F6Common goals U9, I8, F8Streamlining technology U7, I8, F9 | Technology to connect research partnerships with stakekholder mindsets scored highest. |

Your Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Process*** | ***Discuss*** | ***Test:***Scale from 1 (low) to 10 (high):UrgencyImportanceFeasibility | ***Conclude*** |
| Brainstorming – broad exploration of growth options |  |  |  |
| Brainsteering – specific topic exploration of growth options |  |  |  |
| Mind Mapping – connect and integrate identified options for growth  |  |  |  |

***Team Charter Template***

Definition: structure of team meetings and activities

Purpose: to ensure consistent and continuous work of a project

Outcome: project teams meet their expected and desired outcomes, as well as integrate as relevant to other team efforts

Connection to other worksheets: support for all project team efforts as their contribute through the learning system to new value creation

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Team Name*** | ***Team Collaboration*** |
| **Team purpose** | Build high level of collaboration |
| **Team objective and outcome with metric** | All teams work from a consistent mindset to reach desired outcomes in a timely manner |
| **Stakeholders** | Functional members, their leaders, and contributors to the team effort |
| **Members roles and responsibilities** | LeaderRelationship builderTeam integration coordinatorMetric monitor for alignment and feasibilityDecision-making coachSubject-matter experts |
| **Decision-making** | Consensus, majority rules, based on mindset and economic analysis |
| **Communications** | Continuous journaling to update on all team activities and achievements |
| **Schedule** | Weekly meetings, monthly recognition and rewards celebrations |
| **Reflections** | Weekly, as part of regular meeting agenda, recorded and reviewed each week for updates |

Your Worksheet:

|  |  |
| --- | --- |
| ***Team Name*** |  |
| **Team purpose** |  |
| **Team objective and outcome with metric** |  |
| **Stakeholders** |  |
| **Members roles and responsibilities** |  |
| **Decision-making** |  |
| **Communications** |  |
| **Schedule** |  |
| **Reflections** |  |

***Readiness, Relevance, Reinforcement, and Reflection (RRRR) Communications***

Definition: communication structure that enables relevant efforts toward a goal

Purpose: to build engagement and commitment to all knowledge work

Outcome: work completed as needed in the context of all other work

Connection to other worksheets: contributes to the successful implementation of all project work

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***RRRR Communications*** | ***Project Definition – Building the Mentoring Program*** |
| **Readiness** – prepare collaborators with knowledge of the project and its needs for outcomes | 1. Describe the concept of mentoring and reverse mentoring.
2. Describe setup using profile information.
3. Describe how to contribute and use mentoring.
 |
| **Relevance** – describe the project in the context of the organizational goals | 1. Give an example of how mentoring was helpful on a project.
2. Discuss openly opportunities to use mentoring on individual projects.
 |
| **Reinforcement** – share the projected benefits of the outcomes, including recognition and rewards | 1. Discuss project needs to apply and measure mentoring.
2. Discuss how to recognize and reward the mentor or the mentee.
 |
| **Reflection** – review of project activity and outcomes for improvement and potential new value | 1. Define reflection and feedback process.
2. Discuss parameters for making changes or new projects.
3. Define process for revisions based on reflections.
4. Reflect on current project work.
 |

Your Worksheet:

|  |  |
| --- | --- |
| ***RRRR Communications*** | ***Project Definition –***  |
| **Readiness** – prepare collaborators with knowledge of the project and its needs for outcomes |  |
| **Relevance** – describe the project in the context of the organizational goals |  |
| **Reinforcement** – share the projected benefits of the outcomes, including recognition and rewards |  |
| **Reflection** – review of project activity and outcomes for improvement and potential new value |  |

***Idealized Design for Future Needs***

Definition: forecast future events and trends in order to build into project needs

Purpose: to ensure that project work does not fall short of needs based on the timelines of the project achievements

Outcome: project work addresses future needs as they evolve

Connection to other worksheets: integrates into all project planning

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Project Name*** | ***Forecasting the Future through Social Experiences*** |
| **Project definition** | To build a social experiences team and program |
| **Objective and desired outcome** | To build trust, relationship, and stakeholdership among organizational members |
| **Stakeholders** | All shareholders, employees, partners, and customers |
| **Implementation steps and milestones** | 1. Structure the events with an agenda
2. Review and sharing of activities
3. Invitational strategy
4. Recognition and rewards of activities
5. Scheduling relevant to schedule of activities
 |
| **Intervening events, trends, and stakeholders to impact outcomes** | All employees, especially new employeesInternational employees and partnersInternational eventsNew customersNew competitors’ perspectives |
| **Forecasted impact** | Availability of new needs and perspectives, building an awareness of biases, new perspectives, new needs, for social event agendas that evolve to accommodate new perspectives  |
| **Revised desired outcome** | New ideas, new options for opportunities, new trust and relationships with external networks, new knowledge in the organization |
| **Impact to implementation and milestones** | Agenda changes to capture new ideas and needs of new participants and their perspectives. Social experiences team alters agendas monthly to maximize new knowledge and options for new value. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Project Name*** |  |
| **Project definition** |  |
| **Objective and desired outcome** |  |
| **Stakeholders** |  |
| **Implementation steps and milestones** |  |
| **Intervening events, trends, and stakeholders to impact outcomes** |  |
| **Forecasted impact** |  |
| **Revised desired outcome** |  |
| **Impact to implementation and milestones** |  |
| **Idealized implementation plan** |  |

**Module 5. Learning System Steps**

**Chapter Reference: Chapter 7. Ensuring Inquiry with a Learning System**

***Learning System Steps***

Definition: a system to ensure that learning activity drives all planning and work toward success

Purpose: to structure learning inquiry with a mindset approach to all work

Outcome: a common platform to streamline work for clarity and high performance

Connection to other worksheets: accepts input from all other worksheets to integrate into project work

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Learning System Steps*** | ***Problem or Opportunity – Individual and organizational goals do not match.*** |
| 1. **Building mindset awareness**
 | Establish the need for mindset components, being goals, values, beliefs, and mode of work, to match for effective project work. Determine the goals of the current project. Identify any gaps between individual and organizational goals to align all to the project goals.  |
| 1. **Finding options for problem solving or new opportunity**
 | Strategize to identify options to close gaps in goals. Use brainstorming, brainsteering, and mind mapping to identify options. |
| 1. **Economic quantification**
 | Quantify the economic impact of each option. Prioritize the options based on best economic impact. |
| 1. **Mindset qualification**
 | Qualify the emotional/mindset match of each option. Prioritize the options based on best emotional alignment. Select the option that is the best economic and emotional match. |
| 1. **Implementing with project steps**
 | Build a project to implement the selected option. |
| 1. **Reflecting on all work**
 | Reflect on the workflow of the project steps, inputs and outcomes, to further identify obstacles and opportunities. Adjust work to eliminate them or to create new value, as possible. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Learning System Steps*** | ***Problem or Opportunity -***  |
| 1. **Building mindset awareness**
 |  |
| 1. **Finding options for problem solving or new opportunity**
 |  |
| 1. **Economic quantification**
 |  |
| 1. **Mindset qualification**
 |  |
| 1. **Implementing with project steps**
 |  |
| 1. **Reflecting on all work**
 |  |

***Project Steps***

Definition: structuring for work to facilitate relevant inquiry

Purpose: to create a common and consistent workflow process for all workers

Outcome: work completed with clarity in a streamlined manner

Connection to other worksheets: project thinking support for all work in all templates

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Project name, description, purpose*** | ***Goals and Alignment - Aligning to selected goal option to ensure a common mindset for organizational progress and growth*** |
| **Stakeholders** | Stakeholders, employees, leaders, partners, and customers are included. |
| **Result expected** | Projects are focused on a common goal and achieves it. |
| **Current state** | Employees and leaders have diverse goals and work is not aligned for a common outcome. |
| **Gap to be filled** | Bring all stakeholders to a common mindset. |
| **Timeframe** | One month |
| **Implementation steps, dates, tracking & metric** | 1. Build readiness with an understanding of the need for a common goal to guide work to success. One day.
2. Collect perspectives on individual and organizational goals and gaps to achieving a common goal. Three days.
3. Discuss and agree on modifications needed to create the common goal. Two days.
4. Make changes needed for agreed upon modifications. Seven days.
5. Track and test modifications for efficient and effective workflow relevant to a project schedule. Seven days.
 |
| **Resources needed and time estimate for each resource** | All involved members allocate one hour per implementation step above as they continue their predefined work on a project. |
| **Resources available and gap to fill** | All functional leaders are responsible to make resources available.  |
| **Other comments** | Streamlining workflow with a common goal must be revisited regularly by checking that the goals are maintained by others working toward the same goal. |
| **Meeting schedule and agenda for meetings** | Independent goal facilitators review and reflect on work and goal alignment with each team for 10 minutes at the end of each project team meeting. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Project name, description, purpose*** |  |
| **Stakeholders** |  |
| **Result expected** |  |
| **Current state** |  |
| **Gap to be filled** |  |
| **Timeframe** |  |
| **Implementation steps, dates, tracking & metric** |  |
| **Resources needed and time estimate for each resource** |  |
| **Resources available and gap to fill** |  |
| **Other comments** |  |
| **Meeting schedule and agenda for meetings** |  |

***Five Whys Analysis***

Definition: technique to determine correlation, cause, and effect of behaviors and decisions

Purpose: to determine one’s mindset for aligning behaviors and decisions for success

Outcome: understanding of how and what other’s think for better collaboration

Connection to other worksheets: ensures common thinking for more efficient work

Sidney’s Worksheet:

|  |
| --- |
| ***Five Whys Analysis*** |
| ***Decision: To terminate a team member’s participation in a project team who is focused on maximizing profits on an outdated product*** |
| **Why?** | Lack of participation |
| **Why?** | No belief in the goal of the project team |
| **Why?** | Lack of value in the goal, current value on the previous product |
| **Why?** | Participant’s mode of work was to focus on what she valued, not the team goal |
| **Why?** | Participant’s benefit from previous product |

Your Worksheet:

|  |
| --- |
| ***Five Whys Analysis*** |
| ***Decision:***  |
| **Why?** |  |
| **Why?** |  |
| **Why?** |  |
| **Why?** |  |
| **Why?** |  |

***Bloom’s Taxonomy – Seven Levels of Thinking***

Definition: thinking guidance to help progress with logic and objectivity

Purpose: to help workers think to explore incremental and higher levels of thinking

Outcome: activity, behaviors, and decisions advised by higher levels of thinking

Connection to other worksheets: higher level input to all worksheets and project work

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Thinking Levels*** | ***Exploration of a Topic: Building a Community Mindset*** |
| ***Knowledge:*** Recall facts and basic concepts. | Community Mindset:Goal – to be the market leaderValues – growth, empathyBeliefs – growth essential and always possibleMode of work – open sharing, decision parameters, managed risk-taking |
| ***Understanding:*** Explain why facts and/or concepts are important or relevant, background with characteristics and connections between/among the facts and concepts. | Goals and values set the contextual expectations for beliefs and mode of work. |
| ***Application:*** Use facts and/or concepts as they apply to new situations. | Do your goals and values align, do they match with your beliefs and mode of work? |
| ***Analysis:*** Differentiate facts and concepts to identify individual meanings. | Test the match your individual goals and values with those of your stakeholders and organization. Then match your beliefs and mode of work with those of your stakeholders and organization. |
| ***Synthesis:*** Consider facts, concepts, and their individual meanings as they might create a system for new and interdependent meaning to potentially create new value. | How will you modify your goals, values, beliefs, and mode of work to match your stakeholders and organization?  |
| ***Evaluation:*** Consider the cost, benefits, and value of any new idea or value, be able to justify. | How feasible from an economic perspective is it to synthesize the mindsets of self, stakeholders, and the organization? Also consider the other mindset components of all to test the feasibility of the synthesized mindset. |
| ***Creation:*** Produce new and original work or value through the results of previous thinking steps. | Create a new narrative to guide the evolving community mindset. Include all characteristics of the synthesized mindset components. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Thinking Levels*** | ***Exploration of a Topi:*** |
| ***Knowledge:*** Recall facts and basic concepts. |   |
| ***Understanding:*** Explain why facts and/or concepts are important or relevant, background with characteristics and connections between/among the facts and concepts. |  |
| ***Application:*** Use facts and/or concepts as they apply to new situations. |  |
| ***Analysis:*** Differentiate facts and concepts to identify individual meanings. |  |
| ***Synthesis:*** Consider facts, concepts, and their individual meanings as they might create a system for new and interdependent meaning to potentially create new value.. |  |
| ***Evaluation:*** Consider the cost, benefits, and value of any new idea or value, be able to justify with marginal analysis. |  |
| ***Creation:*** Produce new and original work or value through the results of previous thinking steps. |  |

***Archetype/Workflow Analysis***

Definition: to identify obstacles and gaps in workflows that derail expected outcomes

Purpose: to identify the cause and effect of obstacles and gaps

Outcome: relevant fixes identified and applied

Connection to other worksheets: workflow insights for mindset misalignments in project work

Sidney’s Worksheet:

|  |
| --- |
| ***Analysis: Ensuring trust and motivation for knowledge workers through relevant support of project work*** |
| ***Workflow*** | ***Production Delays*** | ***Action*** | ***Employee Retention***  | ***Action*** |
| **Limits to growth**  |  |  | **X** | Mode of work – increased investment |
| **Shifting the burden** |  |  |  |  |
| **Shifting the burden with intervenor** |  |  |  |  |
| **Balancing process with delay** | **X** | Belief in work achieved |  |  |
| **Eroding goals** |  |  |  |  |
| **Escalation** |  |  | **X** | Recognition, reward to reinforce value creation |
| **Success to the successful** |  |  | **X** | Value on equity of investment |
| **Tragedy of the commons** |  |  |  |  |
| **Fixes that fail** |  |  |  |  |
| **Growth underinvestment** | **X** | Mode of work - guide for budgeting |  |  |

Your Worksheet:

|  |
| --- |
| ***Analysis:*** |
| ***Workflow*** | ***Obstacle/Gap***  | ***Action*** | ***Obstacle/Gap***  | ***Action*** |
| **Limits to growth**  |  |  |  |  |
| **Shifting the burden** |  |  |  |  |
| **Shifting the burden with intervenor** |  |  |  |  |
| **Balancing process with delay** |  |  |  |  |
| **Eroding goals** |  |  |  |  |
| **Escalation** |  |  |  |  |
| **Success to the successful** |  |  |  |  |
| **Tragedy of the commons** |  |  |  |  |
| **Fixes that fail** |  |  |  |  |
| **Growth underinvestment** |  |  |  |  |

***Decision Influencers***

Definition: provide relevant data or information to help one think differently in the context of a specific scenario

Purpose: to help a worker modify a goal, value, belief, or mode of work, as needed

Outcome: mindset changes to align to others

Connection to other worksheets: identifies modification steps to achieve desired outcomes

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Outcome*** | ***Change Needed*** | ***Data and Information to Influence*** |
| Mistrust among team peers | Build understanding of common thinking | Identify areas of commonality |
| Lost customer | Reestablish the relationship | Reasons for loss, needs to reverse the loss |
| Non-motivated employee | Motivate for growth and retention | Expanded profiling to understand employee interests, strengths, and needs |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Outcome*** | ***Change Needed*** | ***Data and Information to Influence*** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

***Choice Architectures***

Definition: helps to facilitate a decision when one is challenged with moving forward

Purpose: limit choices and give probable outcomes to motivate action

Outcome: easier decisions

Connection to other worksheets: supports all decisions needed in all other worksheets

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Outcome*** | ***Desired Outcome*** | ***Choices*** |
| No profile completed | Profiles completed for all to use | * Completed profiling earns new opportunity with a current project
* Completed within 6 months earns a possible opportunity with a future project, if available
 |
| Missing deadlines | Make deadlines | * Missed deadlines incur a salary reduction
* Three sequential deadlines made incur a bonus payment
* Ten sequential deadlines made incur a small salary increase
 |
| No purchase of health insurance due to current good health | Health insurance purchase | * Free six-month trial period before subscribing
* Free twelve-month trial period at a very low rate
 |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Outcome*** | ***Desired Outcome*** | ***Choices*** |
|  |  |  |
|  |  |  |
|  |  |  |

***Designing and Building the Digital Nervous System***

Definition: a digital resource of data and information available for research and pivoting to customize further research

Purpose: to support relevant research for decision-making and finding new opportunities

Outcome: a sustaining and thriving organization that meets it goals

Connection to other worksheets: provides the resource required for workflow and operations research and planning

Sidney’s Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Data and Information***  | ***Descriptive - Mindset and Needs*** | ***Predictive –******Future Activity*** | ***Prescriptive – Approach to Manage*** |
| **Customer** - Sales, patterns, repurchase needs | Technology ATZ$10,000 per monthThree year contract | Expand services by 30 percent, year 2 | Customer base needsImplementation workflow and costsMotivators to buy |
| **Operations** - Workflows, integration of functions, inputs and outputs | Expand operations for new contracts, including resources and employees | Increases in input presume increases in output  | Increase employees to ensure increases in input are accommodated for increases in output |
| **Sales and** **Profit** - Revenue and costs per month, margins | Fifty client companies:RevenueCostsMargin | Potential of continued revenue, costs, and margins | Opportunity exploration to increase sales and profits |
| **Profiles** - Individual, customer, partners, organization | Sam, Jill, Martin, Julian, Mary, Theo, ElliottTechnology ATZCulture ABC | Skills and interests to spark new development | Growth plans based on current skills and interests leading to intrapreneuring |
| **Competitors’ profiles** | Competitor A – new remote solutionsCompetitor B – new customer base  | Next competitive version of products and services, expansion of markets | Potential countering products and services or partnerships |
| **Industry descriptions, profiles** | Human Resources – human developmentTechnology – customized solutionsPharma – expedited development cycle for new vaccines | Skills preparation needs, mindset alignment | Learning plans that include skills and education needs, learning culture development |
| **Global descriptions, events, trends** | Global need for collaboration Technology advancement with new skills neededPharma accelerated delivery needs  | Technology skills neededPharma skills and operational updates needed | Plan to accommodate new needs with specialized resources and performance expectations |
| **National descriptions, events, trend**s | Regional sharing of markets  | Sharing strategy to balance and maximize partner’s market share | Plan to manage partners and balance of markets |
| **Regional/local descriptions, events, trends** | Tracking and leveraging local conditions and needs | Logistical changes and supply chain shortages | Manage changes, economic and emotional, to ensure sustaining margins and returns on investment |

Your Worksheet:

|  |  |  |  |
| --- | --- | --- | --- |
| ***Data and Information***  | ***Descriptive - Mindset and Needs*** | ***Predictive –******Future Activity*** | ***Prescriptive – Approach to Manage*** |
| **Customer** - Sales, patterns, repurchase needs |  |  |  |
| **Operations** - Workflows, integration of functions, inputs and outputs |  |  |  |
| **Sales and** **Profit** - Revenue and costs per month, margins |  |  |  |
| **Profiles** - Individual, customer, partners, organization |  |  |  |
| **Competitors’ profiles** |  |  |  |
| **Industry descriptions, profiles** |  |  |  |
| **Global descriptions, events, trends** |  |  |  |
| **National descriptions, events, trends** |  |  |  |
| **Regional/local descriptions, events, trends** |  |  |  |

**Module 6: Reflecting and Celebrating**

**Chapter Reference: Chapter 8. Reflection and Celebration**

***Reflections for Growth (RFG) Team Charter***

Definition: sets up and organizes a team to manage growth initiatives with processes and protocols that reinforce intrapreneurial efforts

Purpose: to engage and motivate employees in intrapreneurial thinking

Outcome: qualified and quantified ideas for growth

Connection to other worksheets: processes all growth ideas that are uncovered in other worksheets

Sidney’s Worksheet:

|  |
| --- |
| ***Reflection for Growth Team Charter*** |
| ***Purpose and Objective*** – includes the reason and desired result of the team effort | The Reflection for Growth Team (RFG) is designed to increase intrapreneurial activity in a way that motivates, quantifies, qualifies, and reinforces new ideas so that individuals’ and the organizational growth is systematic and assured. |
| ***Team Membership*** – describes the protocol for who is involved in the team | Team membership is voluntary but can only include a maximum of one member from each functional area. Members are also approved to participate based on a consensus vote of other team members.The team leadership is rotated every six months in order of individual membership date.  |
| ***Discussion Forums*** – describes how, when, and where discussions will be held | Intrapreneurial activity and ideas are discussed in regularly scheduled forums on Wednesday, 1 PM. They are held in rotating locations at the invitation of a team member and noted on the team website two days prior to being held.The team leader creates an agenda for each forum and distributes proposals, when received, for review to team members. Team leader also leads the discussion based on the parameters of impact and protocols noted in the proposal. |
| ***Parameters of Impact –*** parameters that define the review guidelines for furthering a suggested option or opportunity  | Ideas will be considered based on the following:1. Potential users
2. Economic impact
3. Emotional/mindset impact
4. Competition
5. Cost parameter
6. Resources and scheduling impact
 |
| ***Protocols for Proposals*** – list of requirements to be included in an idea proposal, including preliminary qualifying research needed for consideration and estimating costs of implementing a proposed idea | Ideas are presented to the team leader one week prior to being discussed in the following manner:1. Description of the idea and its potential audience/buyer
2. Rationale for why they might be interested
3. Reasons they might not be interested
4. Competitive forces
5. Preliminary costs and benefits
6. Size of the potential market
7. Time feasibility of development and delivery
 |
| ***Opportunity Leaders*** – accountability and responsibility parameters for idea proposer | The intrapreneur/owner of the idea is named with a description of input and intended responsibility for managing the implementation of the idea.  |
| ***Decision-making*** – definition of decision-making parameters and timeframe | Decision-making on the pursuit of an idea is based on:1. Alignment to goals, values, beliefs, and mode of work
2. Benefits and costs balance
3. Intangible benefits
4. Resource need and availability
5. Cost of acquiring resources needed
 |
| ***Resource Allocation*** – how and when resources can be acquired and allocated to development of an idea; definition of resources available for initial research to quantify and/qualify an idea and to implement it | All organizational members can engage 15 percent of their time, as available, to supporting a new idea, either in validating or implementing it.Other resources can be acquired as long as they fit the balance of benefits and costs in a sic month timeframe. |
| ***Recognition and Rewards*** – what and how ideas will be accepted, recognized, and rewarded, celebrating new value | Intrapreneuring and ideation are rewarded by consensus vote of the members of the RFG team. Rewards can include monetary incentives, certificates, leadership positions on new ideas, and external opportunities to implement an idea. Recognition can include public announcement, publications, or speaking events to share an idea. Celebrations can include social gatherings to share the benefits of an idea. |
| ***Benefits/Impact Summary*** – use of a benefits/impact summary to track the projected new value, including cost or time savings, new market, new customers, new revenue, new narrative, process improvement, employee or customer retention, and motivating stakeholders | A Benefits/Impact Summary is created and shared for each idea. This Summary is used to further the intrapreneurial activity in the organization, suggesting new ideas or benefits from the current work. |

Your Worksheet:

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| ***Reflection for Growth Team Charter*** |
| ***Purpose and Objective*** – includes the reason and desired result of the team effort |  |
| ***Team Membership*** – describes the protocol for who is involved in the team |  |
| ***Discussion Forums*** – describes how, when, and where discussions will be held |  |
| ***Parameters of Impact –*** parameters that define the review guidelines for evaluating a suggested option or opportunity  |  |
| ***Protocols for Proposals*** – list of requirements to be included in an idea proposal, including preliminary qualifying research needed for consideration and estimated costs of implementing a proposed idea |  |
| ***Opportunity Leaders*** – accountability and responsibility parameters for idea proposer |  |
| ***Decision-making*** – definition of decision-making parameters and timeframe |  |
| ***Resource Allocation*** – how and when resources can be acquired and allocated to development of an idea; definition of resources available for initial research and quantification/qualification of an idea |  |
| ***Recognition and Rewards*** – what and how ideas will be accepted, recognized, and rewarded, celebrating new value |  |
| ***Benefits/Impact Summary*** – use of a benefits/impact summary to track the projected new value, including cost or time savings, new market, new customers, new revenue, new narrative, process improvement, employee or customer retention, and motivating stakeholders |  |

***Growth Parameters, Investment, and Returns Parameters***

Definition: provides decision parameters for all pivots and growth initiatives

Purpose: to define and support autonomous decision-making

Outcome: decisions aligned to organizational expectations to implement

Connection to other worksheets: provides context for all decisions within all other worksheets

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Growth and Performance Parameters*** | ***Culture ABC Parameters*** |
| Supports goals and values | Measured individual growthIncrease in market shareMeasured leadership in marketExpert narrativeExploration of new domains |
| Supports individual growth | New projects focus learning for participating members  |
| Supports organizational growth | Measured new revenueNew elements added to narrativeAdd to leadership in market |
| Resources are available  | Measured member interest in volunteering to participate with available time |
| ***Investment*** | ***Culture ABC Parameters*** |
| Resources can be acquired within defined ranges: percent of member time, match of cost and benefit within six months | 15 percent of current member timeMeasured and continuing perceived benefit of current participants |
| Other investment up to percent of new revenue | 20 percent of new revenue to be invested based on benefit match |
| Exceptions are due to extreme need or opportunity, evaluated by senior leadership team | Exceptional consideration for opportunities or improvements that will yield 40 percent or above of current margin or 15 percent of current net revenue, aligned to current company mindset |
| ***Returns on Investment*** | ***Culture ABC Parameters*** |
| Time in months | Benefits are realized within six months of investment. |
| Intangibles of goodwill, new market awareness | Goodwill of mindset, invisible capital, or priming new opportunities are documented and pursued according to performance parameters. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Growth and Performance Parameters*** |  |
| Supports goals and values |  |
| Supports individual growth |   |
| Supports organizational growth |  |
| Resources are available  |  |
| ***Investment*** |  |
| Resources can be acquired within defined ranges: % of member time, match of cost and benefit within 6 months |  |
| Other investment up to % of new revenue |  |
| Exceptions are due to extreme need or opportunity, evaluated by senior leadership team |  |
| ***Returns on Investment*** |  |
| Time in months |  |
| Intangibles of goodwill, new market awareness |  |

***Story/Project Session Planning***

Definition: shares others’ experiences to analyze narrative and mindset

Purpose: to inspire new ideas, creativity, and intrapreneuring for individual’s and organizational member’s growth

Outcome: a continuous stream of new ideas and opportunities to consider

Connection to other worksheets: sparks new thinking in completing all other worksheets

Sidney’s Worksheet:

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| --- | --- |
| ***Stories for Learning*** | ***Reflective Stories*** |
| **Story Sharing** | A current customer developed new relationships with their customers due to the outreach of Culture ABC employees to assist in collaboration through conversation starters, stages, styles, and content design of communications. Culture ABC was role-modeling behaviors that would ensure trust and new relationships. The customer’s business increased significantly. |
| **Considerations of narrative** | Culture ABC’s narrative is sharing skills of communication, collaboration, and performance. |
| **Mindset in support of narrative** | The supporting mindset is based on matching goals, values, beliefs, and modes of work for growth in everyone’s skills. |
| **Benefits and impact**  | Culture ABC benefits when customers grow. This makes growth a priority effort for both parties. |
| **Potential pivots** | New understandings of the customer’s needs guide a pivot to impact customer performance for improvement. |
| **Potential new opportunities** | Awareness of new customer needs helps Culture ABC’s employees find new options to explore for growth in the domain of related services. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Stories for Learning*** | ***Reflective Stories*** |
| **Story Sharing** |  |
| **Considerations of narrative** |  |
| **Mindset in support of narrative** |  |
| **Benefits and impact**  |  |
| **Potential pivots** |  |
| **Potential new opportunities** |  |

***Narrative Check-In***

Definition: to track narrative changes based on behaviors and decisions

Purpose: to help ensure understanding of narrative and changes

Outcome: narratives always current and as desired

Connection to other worksheets: provides insight into obstacles, overlaps, and gaps in workflow due to mindset mismatches and narrative misunderstandings

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Behaviors or Decision*** | ***Narrative-Mindset Indicator*** | ***Modification Needed*** |
| Inclusion of all members in story sharing | Belief that growth is essential and possible | Engage all in growth conversations |
| Integration of expertise from all members | Importance of member growth | Engage members in their own growth design |
| Customer prioritizing | Customer-first  | Balance customer with company priorities so services can prevail most effectively |
| Decision to delay spending due to limits | Mitigating risk-taking | Use balance of outcomes to monitor risk and spending |
| Deadline observation | Respect for others | Balance with reasonable exceptions |
| Explicit communications | Clarity of purpose | Seek acknowledgement of understanding |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Behaviors or Decision*** | ***Narrative-Mindset Indicator*** | ***Modification Needed*** |
|  |  |  |
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***Benefits/Impact, New Opportunity Analysis***

Definition: reflection on previous work to provide insights into value created and potential new opportunities

Purpose: to uncover and manage the impact of benefits, internal and external to individuals and/or the organization

Outcome: support for recognizing and maximizing value for the individual and the organization

Connection to other worksheets: serves as a record for all value created through the other worksheets

Sidney’s Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Benefits*** | ***Impact*** | ***New Opportunity*** |
| Time savings | Combined workflows | Individual growth through new skills development |
| Cost savings | Replacing text editing with a new text application | Increased resources for new projects |
| Revenue generated | New automated customer data entry service | Ability to invest in a new opportunity with new revenue |
| New business concepts | New ancillary product to accompany main product  | Increasing distribution to a current and a potential new market |
| New business pipeline | New product use  | New customer base |
| Supporting endeavors | Added email service to phone services | New needs provide new relationships |
| Infrastructure development | Created a new quality team to replace quality work within each operational function  | New efficiency and effectiveness in quality domain |

Your Worksheet:

|  |  |  |
| --- | --- | --- |
| ***Benefits*** | ***Impact*** | ***New Opportunity*** |
| Time savings |  |  |
| Cost savings |  |  |
| Revenue generated |  |  |
| New business concepts |   |  |
| New business pipeline |  |  |
| Supporting endeavors |  |  |
| Infrastructure development |  |  |

**Module 7: Building an Autonomous Environment**

**Chapter Reference: Chapter 9. An Autonomous Environment**

***Individual Autonomy***

Definition: sets foundational guidelines and structures needed for an autonomous environment

Purpose: to support autonomous work with decision-making parameters, skills, and resource support

Outcome: higher productivity and performance through autonomous knowledge workers and work

Connection to other worksheets: provides skills and support needed to complete all other worksheets

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Characteristics of Individual Autonomy*** | ***Artifacts*** |
| ***Considers mindsets*** – One thinks about the four components of mindset and their alignment to each other. Mindset considerations happen for each decision and stakeholders involved in a work initiative. Do the components align to each other? | Workers build relationships with collaborators to ensure awareness of their thinking and mindsets that drive decisions. |
| ***Sets goals and pursues results*** – Goals are set as part of mindset, but then a hierarchy of goals and results expected are set for each effort, a project, and daily work. | Workers have individual goals and work towards specific results for each goal.  |
| ***Values inquiry and learning*** – Knowledge workers query all efforts and define expected learning. Mindset components are identified and queried in support of all efforts. | Workers use data resources to learn about projects and mindsets prior to making decisions. |
| ***Ensures data access and uses data for decisions*** – Queries spark identification of relevant data and information as available through the digital nervous system for decision-making. | Workers ensure that they have and use data resources in order to make good decisions. |
| ***Makes decisions*** – Knowledge workers are comfortable and competent in making decisions routinely. | Workers consider multiple factors prior to making decisions. |
| ***Reflects for new value ideas and celebrates them*** – Knowledge workers automatically reflect on all work, initiatives, and outcomes to improve performance or to identify improvements, new ideas, and opportunities. | Workers consider previous work and results to uncover new ideas. They recognize, reward, and celebrate new value. All participate in team discussion sessions for this specific purpose. |
| ***Creates new value*** – Knowledge workers systematically pursue opportunities to create benefits that positively impact themselves and/or their organizations. | Workers are continuously recognized and rewarded for finding and implementing new ideas, for intrapreneuring. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Characteristics of Individual Autonomy*** | ***Artifacts*** |
| ***Considers mindsets*** – One thinks about the four components of mindset and their alignment to each other. Mindset considerations happen for each decision and stakeholders involved in a work initiative. Do the components align to each other? |  |
| ***Sets goals and pursues results*** – Goals are set as part of mindset but then a hierarchy of goals and results expected are set for each effort, a project, and daily work. |  |
| ***Values inquiry and learning*** – Knowledge workers query all efforts and define expected learning. Mindset components are identified and queried in support of all efforts. |  |
| ***Ensures data access and uses data for decisions*** – Queries spark identification of relevant data and information as available through Bill Gates’ digital nervous system for decision-making. |  |
| ***Makes decisions*** – Knowledge workers are comfortable and competent in making decisions routinely. |  |
| ***Reflects for new value ideas and celebrates it*** – Knowledge workers automatically reflect on all work, initiatives, and outcomes to improve performance or to identify new ideas and opportunities. |  |
| ***Creates new value*** – Knowledge workers systematically pursue opportunities to create benefits that positively impact themselves and/or their organizations. |  |

***Organizational Environment for Autonomy***

Definition: an organizational environment for autonomy that supports trust for autonomous decision-making for high performance

Purpose: to support decision-making and learning for knowledge workers to make improved decisions

Outcome: high performance 21st century organizations

Connection to other worksheets: supports all worksheet completion with good decisions-making and learning

Sidney’s Worksheet:

|  |  |
| --- | --- |
| ***Characteristics of an Autonomous Environment*** | ***Artifacts*** |
| Organizational mindset and narrative are defined and shared, including performance and learning goals and mode of work | Culture ABC has a specific website for knowledge workers that provides mindset and narrative descriptions and examples of their application toward current work. |
| Mindset awareness and alignment is required and supported with relevant data and information regarding individuals, stakeholders, organizational, project, and partner mindsets | Mindset component descriptions are validated with supporting data and information.  |
| Digital nervous system for data and information support and analysis of mindset, future state, workflow and archetype analysis, decision influencers, and choice architectures | A digital nervous system is designed and updated every six month based on current events, trends, members, and business conditions. |
| Confidence-building, inquiry and learning-orientation support through personal profiling, a learning system structure, prior learning references, teams and projects, autonomous decision-making, economic and mindset evaluation, archetype workflow analysis, and future state speculation | Learning systems and project structures are routinely available and used by all knowledge workers. |
| Recognition and reward for new value creators/contributors and awareness of percent of contribution to organizational revenue | Value creators are recognized through story sharing sessions and rewarded with tangible gifts. Percentage of tangible value is also recognized. |
| Growth and reflection teams to uncover, support, and reinforce new ideas | The RFG team is open to all members to participate in recognition, reward, and celebration of new value created. Value created is estimated as a percent of overall performance. |
| A balance of management theories, satisfiers, and motivators | Worker profiles include their identified satisfiers and motivators. Management theories are included in the organizations website for knowledge workers, as well as how and when they apply to specific work activities. |

Your Worksheet:

|  |  |
| --- | --- |
| ***Characteristics of an Autonomous Environment*** | ***Artifacts*** |
| Organizational mindset and narrative are defined and shared, including performance and learning goals and mode of work |  |
| Mindset awareness and alignment is required and supported with relevant data and information for individuals, stakeholders, organizational, and partners |  |
| Digital nervous system for data and information support and analysis of mindset, future state, workflow and archetype analysis, decision influencers, and choice architectures |  |
| Confidence-building, inquiry and learning-orientation support through personal profiling, a learning system structure, prior learning references, teams and projects, autonomous decision-making, economic and mindset evaluation, archetype workflow analysis, and future state speculation |  |
| Recognition and reward for new value creators/contributors and awareness of % of contribution |  |
| Growth and reflection teams to uncover, support, and reinforce new ideas |  |
| A balance of management theories, satisfiers, and motivators |  |