

Momentum Partners, LLC.

...Accelerating Results!



Building Sustainable Client-Centered Solutions, Internally or Externally

May 1, 2014



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Part 1

- Case Examples Using Assessments
- Instrument Research / Validation
- Exercises

Part 2

- Overview / Background – Wiley DiSC®
- Explore 4 Instruments + Applications
- Learn How to Get a Free Profile

Elaine Steiner



- Specializes in mid-level executive education, leadership, coaching, management off-sites and workshops
- Over 25 years of experience with a major luxury goods retailer focusing on organizational development, communication, team and individual performance

Certifications:

- International Society for Performance Improvement (ISPI) – Certified Performance Technologist (CPT)
- American Society for Training & Development (ASTD) – Certified Professional in Learning and Performance (CPLP)
- DiSC – Certified Facilitator
- Myers Briggs (MTBI) / FiroB – Certified Facilitator
- Dale Carnegie – Certification & Coach; Effective Communications and Human Relations Skills
- LEAN Certification, Green Belt

Wendy Blumenstein

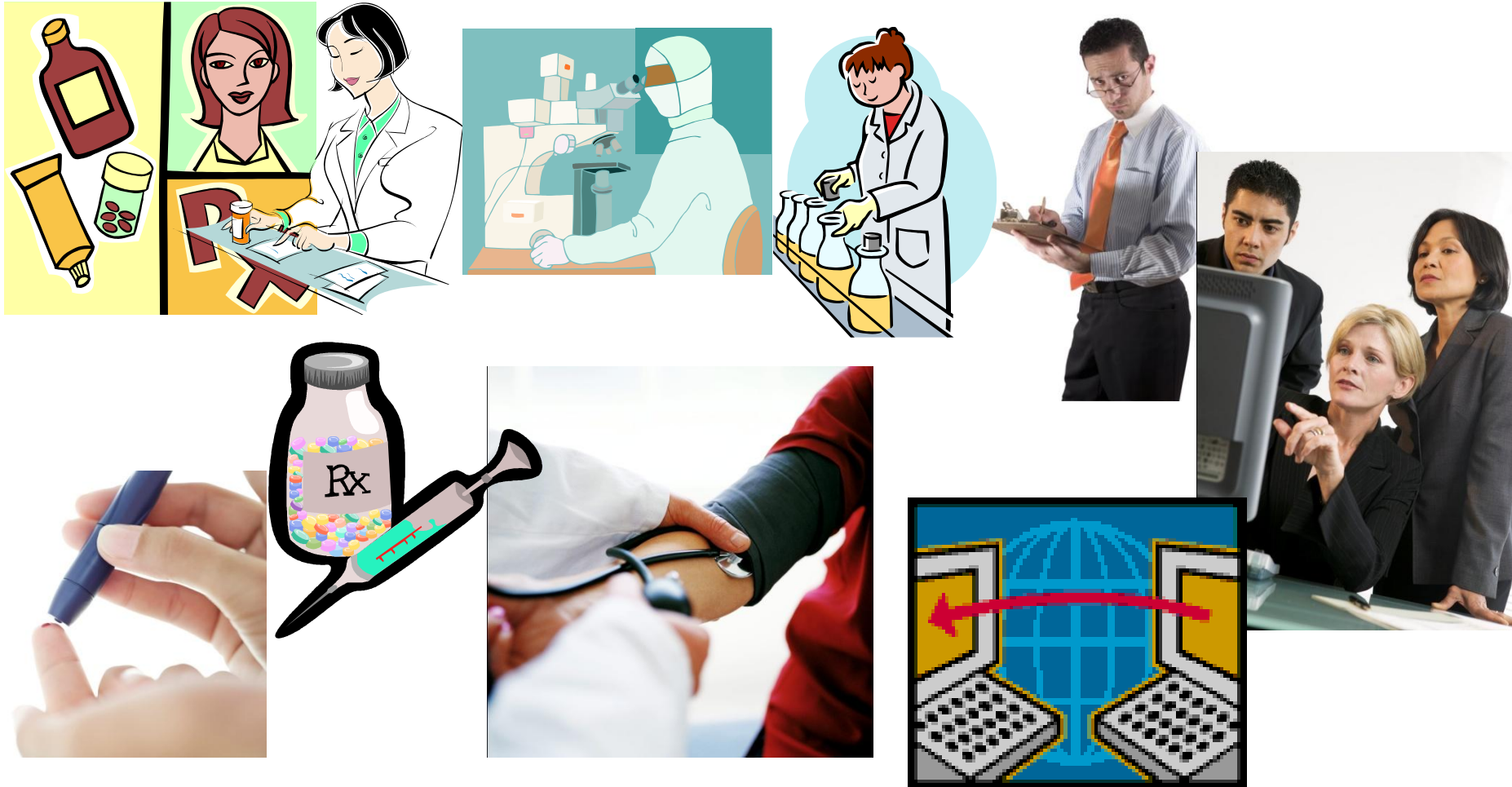


- An expert in Business Change Implementation, Engagement, and improving productivity with sustainable implementation. For over 3 decades Wendy's work has encompassed implementing change strategies for business growth, greater efficiency, effectiveness and ROI to owners, investors, and stakeholders.
- Education:
 - Masters Degree, Adult Learning + Organizational Development, *Temple U.*
 - Bachelor of Science Degree, *Pennsylvania State University*
- Additional Qualifications
 - Wiley Partner, DiSC® Trainer, Authorized Distributor
 - Vital Learning Partner + Trainer
 - Alignment Manager (specialized alignment tools & techniques)
 - Certified Leadership & Business Coach
 - Published on change, teamwork & innovation – ASTD, Leadership Excellence, and more

Culture and Tactical Org Change

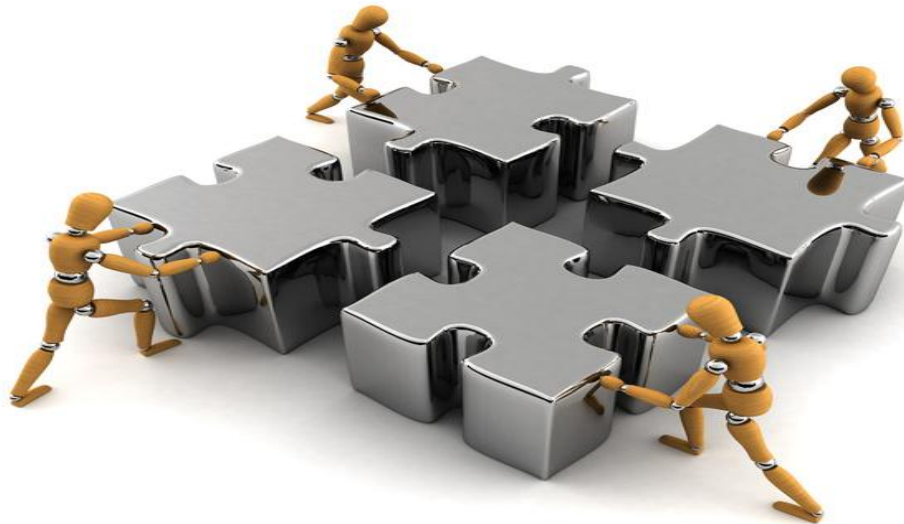
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Consistent Quality Systems Across the World

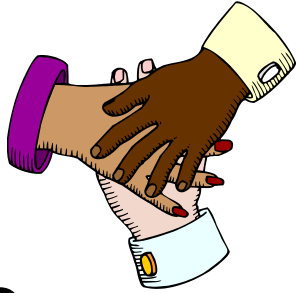


Consistent Quality Systems Across the World

- Understand Yourself – Understand Others
 - Bring Out Best in Others



Consistent Quality Systems Across the World



- To ...
 - Bring Out Best in Others
- People Reading
 - Platinum Rule – “Do unto others as they would have you do unto them”



Consistent Quality Systems Across the World

- Leadership & Change Best Practices Process
 - Know what gaps to fill + how to fill them



Fundamental Process

- Vision
- Alignment
- Execution

Work of Leaders: Vision, Alignment, and Execution

Work of Leaders provides a simple, three-step process to help you reflect on how you approach the most fundamental work of leaders: Creating a Vision, building Alignment around that vision, and championing Execution of the vision.



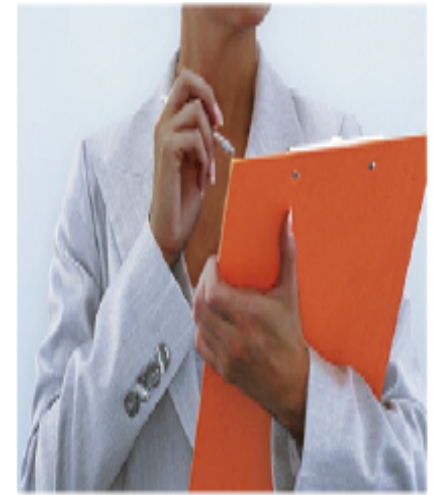
VISION

The work of leaders includes crafting a vision of new possibilities for the future through exploration, boldness, and testing assumptions.



ALIGNMENT

Leaders build alignment by communicating with clarity, engaging in dialogue, and providing inspiration, so everyone is moving in the same direction.



EXECUTION

Finally, leaders need to champion execution through momentum, structure, and feedback, to enable the group to capitalize on its talents while making the vision a reality.

Consistent Quality Systems Across the World

- Understand Yourself – Understand Others
 - Platinum Rule – “Do unto others as they would have you do unto them”
 - Bring Out Best in Others
- People Reading
- Leadership & Change Best Practices Process
 - Know what gaps to fill + how



Talent Development

- Helps managers & employees have meaningful conversations
- Strengths / skills / areas of opportunity openly discussed
- Short term vs. long term development
- No assumptions – real data
- Behaviors needed to adopt, embrace and exhibit necessary skills

Learning Assessments

– Foundational for Change

- Understand Yourself – Understand Others
 - Platinum Rule – “Do unto others as they would have you do unto them”
 - Bring out Best in Others
- Talent Development
 - Direct Reports – Dialogues, Performance
 - Know what coaching is needed to assess willingness to adopt new skills
- People Reading
- Leadership & Change Best Practices Process
 - Know what gaps to fill + how

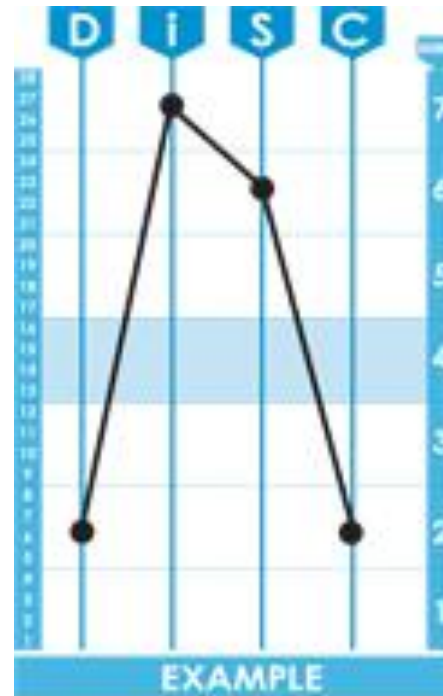
DISC Background

- Based work of Marston
- Studied work environment
- Based on emotional responses of normal people – 1928 published ‘Emotions of Normal People’
- The theory was developed into a 4 quadrant model based on Marston’s work – examined behavior in specific environments
 - Scales were developed and named by Marston & Clark

DISC History

- Marston's DISC theory defines four categories of human behavioral styles:
 - "D" for Dominance-Drive-Direct
 - "I" for Influence
 - "S" for Steadiness or Stability
 - "C" for Compliant, Conscientious, or Cautious
- Marston never developed DISC theory into the four quadrant model
 - Never copyrighted his work
 - Dr. John Geier took that work and created the first DISC personality instrument that became part of Inscape Publishing's Learning Instruments, now Wiley owned

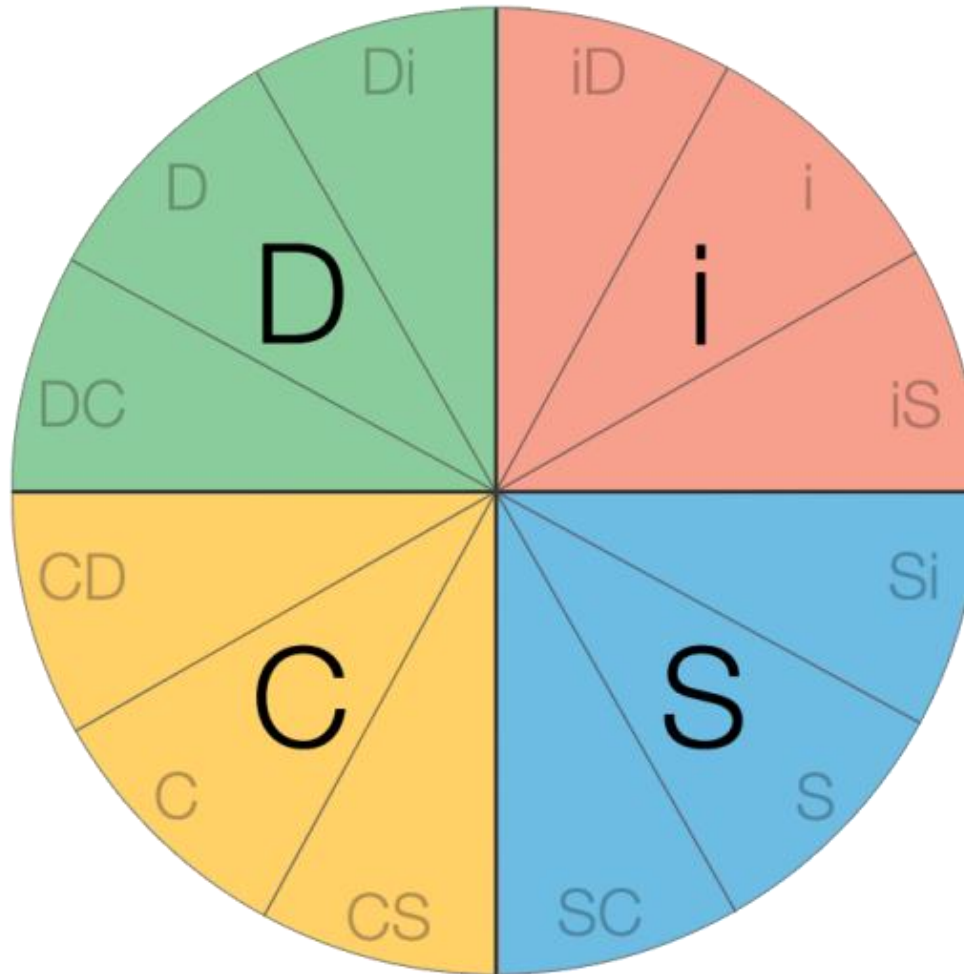
Have you seen this?



Your DiSC[®] Style

How about
this?

Everything
DiSC[®] – 8
Scales



- Construct Validity
- Reliability
- Internal Consistency
- Construct Validity



Two fundamental questions:

1. How reliable is the tool?

That is, researchers ask if an instrument measures in a consistent and dependable way. If the results contain a lot of random variation, it is deemed less reliable.

2. How valid is the tool?

That is, researchers ask if an instrument measures accurately. The more that a tool measures what it proposes to measure, the more valid the tool is.

- Stability can be quantified as a reliability coefficient – statistic generated looks at mathematical relationship between group's initial scores + subsequent scores
- Reliability coefficients range between -1 and +1
- *The closer the coefficient is to +1, the more stable the instrument is considered to be*
 - Coefficients above .70 are considered acceptable
 - Coefficients above .80 are considered very good
- ***Everything DiSC® scales are +.85, with a median of .87***

Adaptive Testing

- What is it?
- Why is it important?
- What other instruments use it?
 - Workplace Assessments?



Exercises

- A flavor for some other exercises



How You See Yourself



Active



Questioning

Accepting



Thoughtful



People Reading

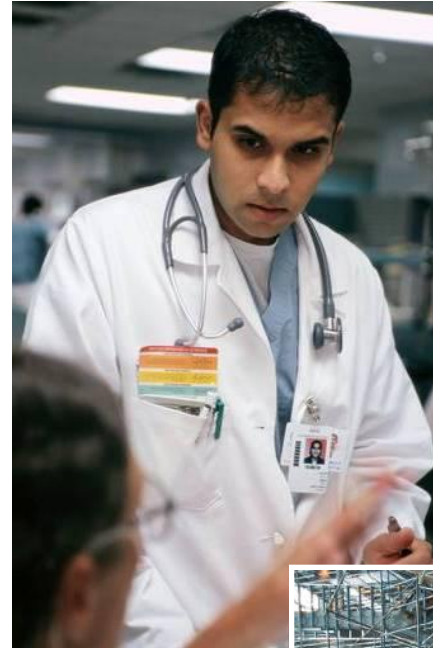
Module 2

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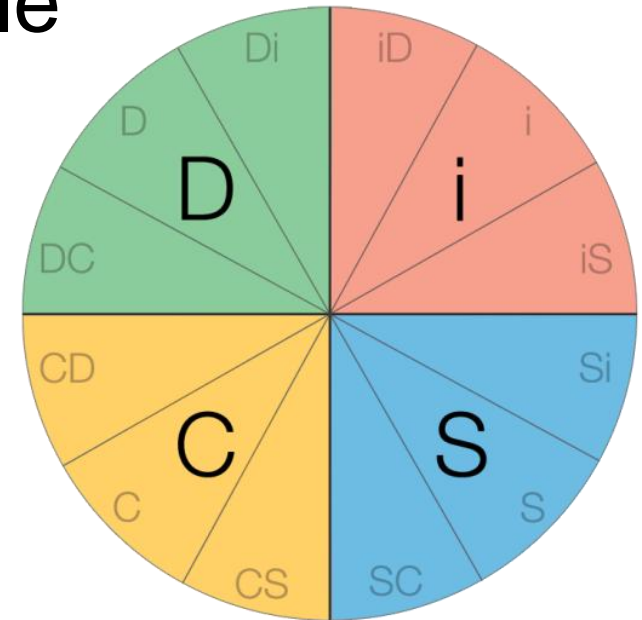
People Reading

- Method to recognize behavioral styles
- We can't be sure of others' styles until they tell us
- But, we can start with a base of knowledge



Why Use DiSC®?

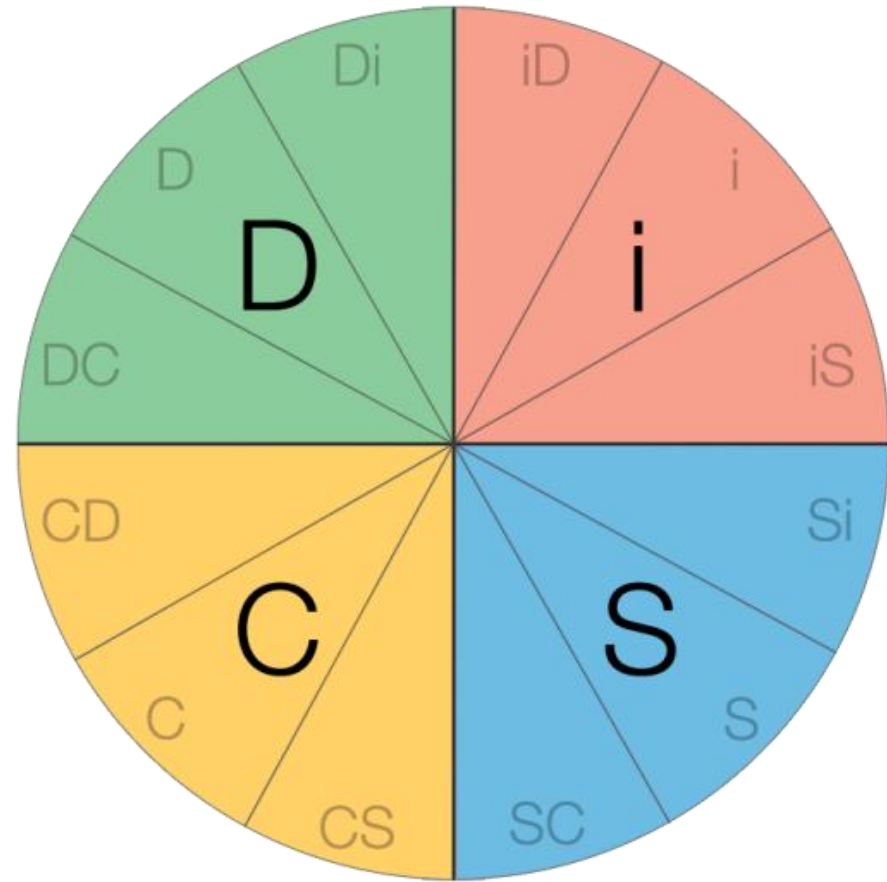
- Value
- How can it support sustainable business objectives?



Next 1 hr - Everything DiSC® Profiles

■ Learn Profiles

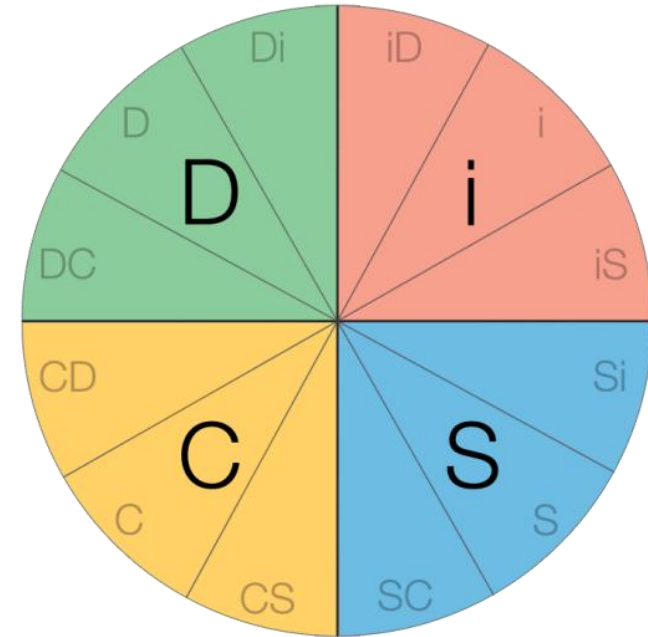
- Workplace
- Management
- Work of Leaders
- Sales



Part 1

- Case Examples Using Assessments
- Instrument Research / Validation
- Exercises

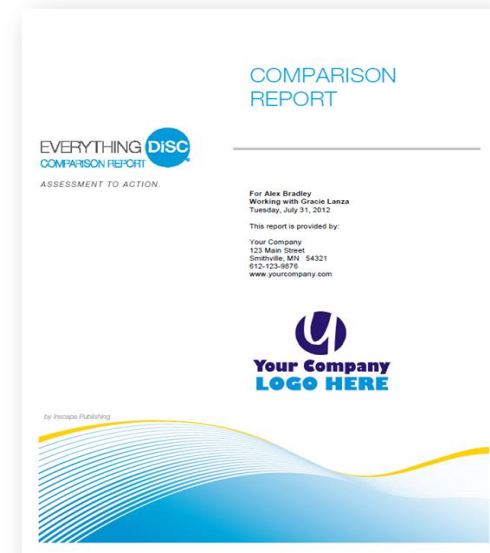
Take a Profile



- Free Profile Link for Everyone
 - Share your card or fill out a form

For You ...

- Draw for a free 1-1 personal debrief
- Want a platform to run profiles for your company? We can set you up
- Interested in piloting a profile and training – ask me about it
- Want to use profiles with your clients?
- Get free comparison reports to be done between 2 people
- Become Certified
- Free Showcase or Lunch & Learn for your Company ...



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Thank You!



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Part 2 – Experiencing Profiles

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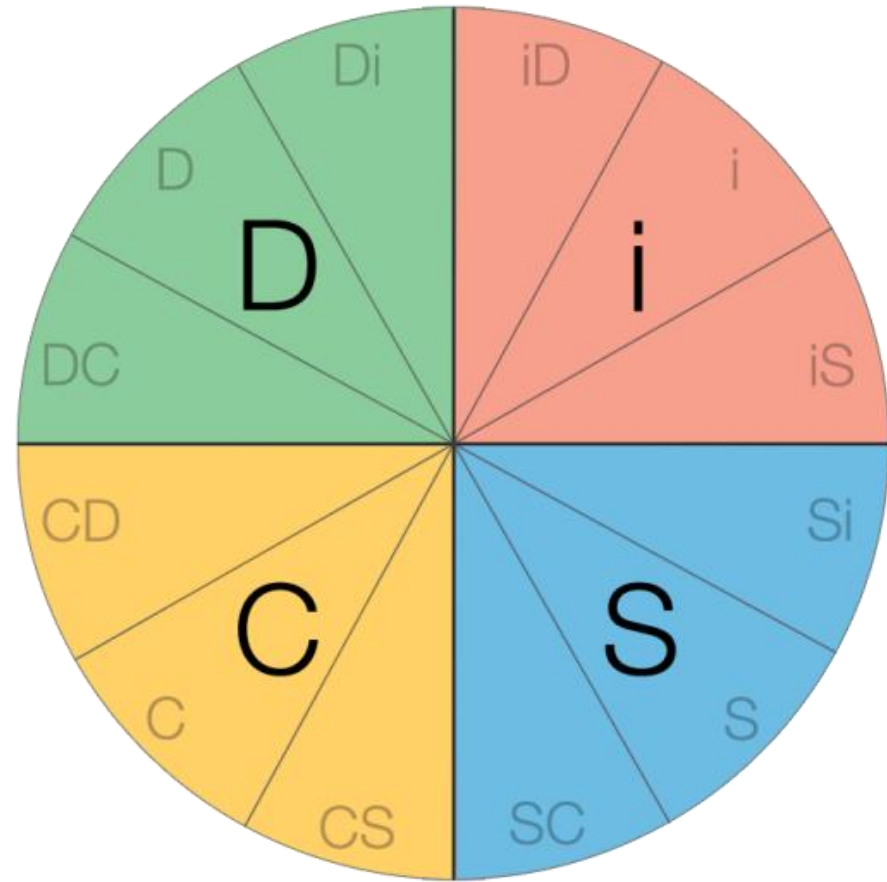
- Overview / Background – Wiley DiSC®
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- Wiley (Inscape DiSC®)
 - First – Based on William Marston's Work
 - Everything DiSC® is Most Updated Set of Instruments for Today's Workplace
 - Highest Reliability & Validation
 - Ongoing Research & Development
 - Everything DiSC®
 - Facilitator Kits
 - Slides, Video, Great Exercises
 - Profiles

Everything DiSC® Profiles

■ Learn About Profiles

- Workplace
- Management
- Work of Leaders
- Sales



Learning Assessments

- **Workplace** — Build productive working relationships with anyone in your organization
- **Management** — Adapt your management style to meet the needs of each team member
- **Work of Leaders** — Gives leaders best practices to make their vision come to life
- **Sales** — Understand your customers' buying styles and close more deals
- **363 for Leaders** — A 360 that's easy to understand and apply
- **Conflict** — Develop the understanding and self-awareness necessary to resolve interpersonal conflict
- **Five Behaviors of a Cohesive Team** — Build greater trust, healthy conflict, commitment, and accountability to achieve results (Lencioni)



Everything DiSC® Profiles

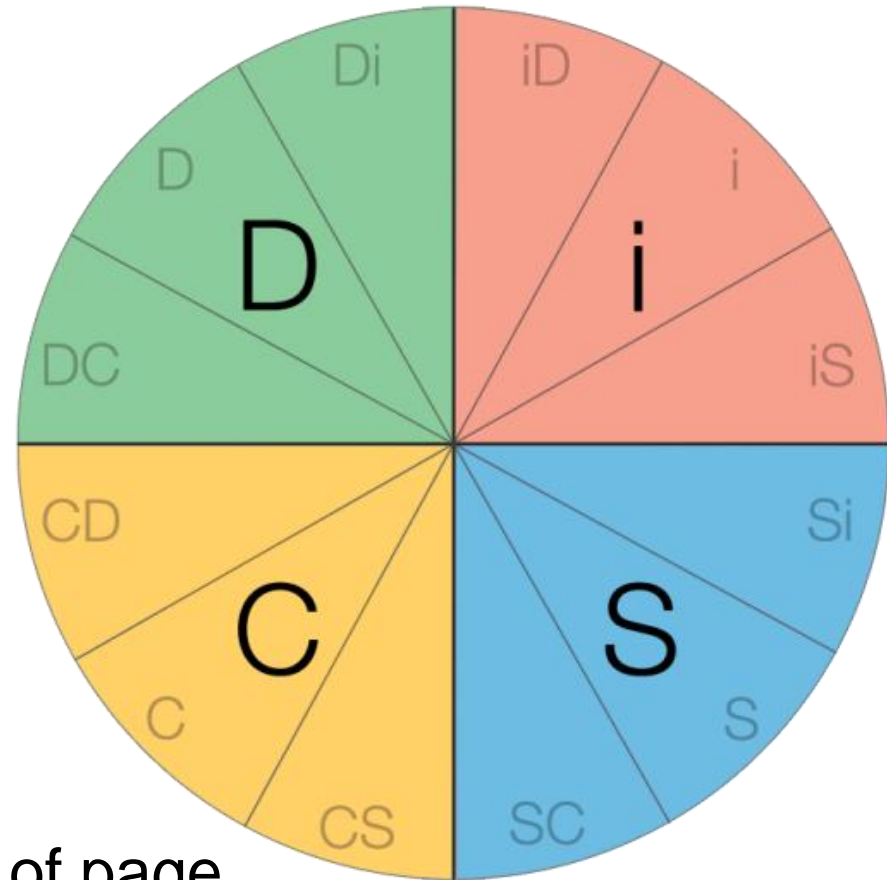
■ Form Profile Work Groups

- Workplace
- Management
- Work of Leaders
- Sales

■ Get profile at ...

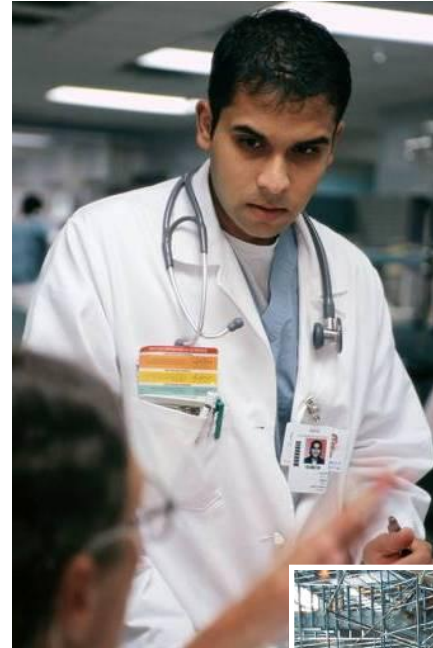
www.Momentum-Partners-LLC.com/Assessments.html

Click links in upper right corner of page
(under Profiles & Facilitator Kits)



Report Out – As a Group

1. Tell us potential workplace applications where you could use this profile to support sustainable business outcomes.
2. What do you like about the profile?



Comparison Report


EVERYTHING DiSC®
COMPARISON REPORT

ASSESSMENT TO ACTION.

For Alex Bradley
Working with Gracie Lanza
Tuesday, July 31, 2012

This report is provided by:


Your Company
123 Main Street
Smithville, MN 54321
612-123-9876
www.yourcompany.com


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by Inspiro Publishing

HOW YOU AND GRACIE FIT ON THE EVERYTHING DiSC® MAP

The eight words shown around the Everything DiSC® Map shown below are priorities that people use in their work that affect their relationships with others.



● = Alex:
Di Style

○ = Gracie:
C Style

You emphasize:

- ACTION
- RESULTS
- ENTHUSIASM

Gracie emphasizes:


- ACCURACY
- STABILITY
- CHALLENGE

DARING = CAREFUL

► Discover

When it comes to taking risks, some people are naturally daring, while others tend to be more careful. You're probably comfortable taking chances, while others who you interact with may prefer to exercise more caution. In some situations, your daring approach will be quite effective, while in others, it may cause you to act impulsively.

- Careful individuals may want to take things slowly.
- Daring individuals may want to charge ahead.
- Behaviors on both ends of the continuum are valuable.



You're very daring; Gracie is very careful. Alex, compared to Gracie, you're more likely to welcome bold ideas and gamble on big payoffs.

► Personalize ✓ X ?

Alex's Tendencies	Gracie's Tendencies
<input type="checkbox"/> Tends to see change as invigorating	<input type="checkbox"/> Tends to see major changes as risky or stressful
<input type="checkbox"/> Tends to pitch fresh ideas and new approaches	<input type="checkbox"/> Tends to rely on well-tested methods and solutions
<input type="checkbox"/> May come across as reckless at times	<input type="checkbox"/> May come across as closed-minded at times

► Apply

Potential roadblocks when working with Gracie

- You may feel that she is overly conventional or risk-averse.
- She may occasionally find your approach to be somewhat reckless.

Potential benefits of you and Gracie working together

- Your bold ideas may sometimes lead to valuable improvements.
- Her sense of caution probably helps keep unpleasant surprises to a minimum.

Tips for working with Gracie

- Avoid insisting that your plan is better just because it's new and different.
- Consider her legitimate objections to somewhat riskier aspects of your ideas.
- Remember that she dislikes moving forward with a plan until she is sure it will work.

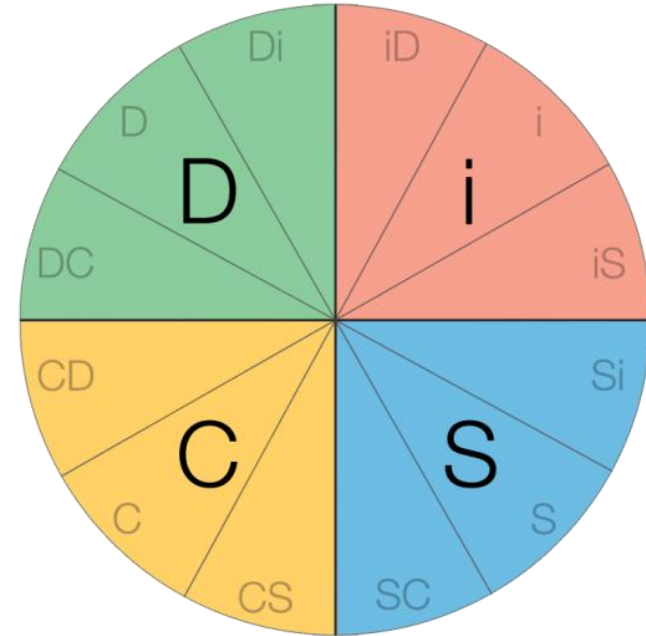
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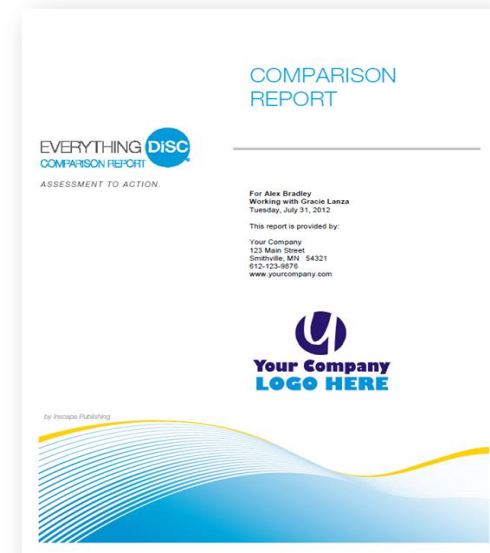
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