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1. Welcome and Introduction

This module of the CAPS training curriculum concentrates on the leadership skills to help you be an effective multi-site supervisor. As your position in an organization grows, leadership skills become more important than technical skills.

To be a successful multi-site supervisor, you need to have talented, trustworthy people reporting to you. It’s impossible for any one person to lease every apartment, fix every refrigerator, and fill out all the paperwork – but the people who do all that work need a leader, and we’re here today to help you be the best leader you can be.

In this class, we’re going to identify the skills that make a good leader, and help you assess your own strengths and weaknesses. When you leave here, you’ll have the tools to work on the areas you’ve identified for improvement, and that will help you improve your bottom line.

Learning Goals and Objectives

This course will help you achieve five key learning objectives. These goals are to:

- Understand the differences between leadership and management, and why both are important.
- Improve your leadership knowledge, skills, and abilities, particularly as they relate to something called emotional intelligence.
- Develop an awareness of your own leadership style—what you currently do well, and what opportunities you have.
- Perform essential leadership activities with greater ability and confidence.
- Prepare you for the Certified Apartment Portfolio Supervisor (CAPS) designation examination.

You’ll achieve these objectives by participating in a number of classroom activities: mini-lectures, individual assessments, small group activities, and group discussions.
Where this Course Fits in the CAPS Training Curriculum

"Effective Leadership" is the fifth and final course in the CAPS training series. It follows these courses:

- Legal Responsibilities and Risk Management
- Financial Management
- Property Performance Management
- Property Evaluation and Due Diligence

Think of this course as the culminating learning experience in this curriculum, one that will help pull together everything you've learned.

Course Overview

This Effective Leadership course is divided into six parts:

1. Leadership versus Management
2. Emotional Intelligence
3. Engagement/Motivation
4. Feedback and Coaching
5. Teambuilding
6. Action Planning and Wrap-Up

Throughout the course, you'll take part in self-assessments, large and small group activities, and even have a chance to build a team of your own.

Ground Rules

- *Participate fully.* What you get out of this class is fully dependent on what you put into it.
- *Help us stay on track.* We're going to cover a lot of ground today—at quite a fast pace—and to make sure you get the full leadership training experience, we'll need everyone to stay focused.
- *Have fun.* The amount of learning that will take place is directly proportional to the amount of fun you have.
2. Leadership versus Management

A good manager also needs to be a good leader. A good leader also needs to be a good manager.

A manager without leadership skills comes up with great plans but can’t get people to follow his or her vision. A leader without management skills comes up with great ideas but can’t put together a feasible plan to get to the final result.

In this part of the training, you’ll discover the differences—and similarities—between management and leadership, and why it is so critical to gain fluency in both disciplines.

Learning Objectives
- Define the difference between leading and managing.
- Identify when “leading” is needed and when “managing” is needed.

Topics
- The Kotter Module of Management
- Leading versus Management
The Kotter Model of Management

*Harvard Business School Professor John P. Kotter cogently sums us the differences between leadership and management in the table below.*

<table>
<thead>
<tr>
<th>Management</th>
<th>Leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning and Budgeting</strong></td>
<td><strong>Establishing Direction</strong></td>
</tr>
<tr>
<td>Establishing detailed steps and timetables for achieving needed results, and then allocating the resources necessary to make that happen.</td>
<td>Developing a vision of the future, often the distant future, and strategies for producing the changes needed to achieve that vision.</td>
</tr>
<tr>
<td><strong>Organizing and Staffing</strong></td>
<td><strong>Aligning People</strong></td>
</tr>
<tr>
<td>Establishing some structure for accomplishing plan requirements, staffing that structure with individuals, delegating responsibility and authority for carrying out the plan, and providing policies and procedures to help guide people, and creating methods or systems to monitor implementation.</td>
<td>Communicating the direction by words and deeds to all those who cooperation may be needed so as to influence the creation of teams and coalitions that understand the vision and strategies, and accept their validity.</td>
</tr>
<tr>
<td><strong>Controlling and Problem Solving</strong></td>
<td><strong>Motivating and Inspiring</strong></td>
</tr>
<tr>
<td>Monitoring results versus plan in some detail, identifying deviations, and then planning and organizing to solve these problems.</td>
<td>Energizing people to overcome major political, bureaucratic, and resource barriers to change by satisfying very basic, but often unfilled, human needs.</td>
</tr>
<tr>
<td><strong>Produces Predictability and Order</strong></td>
<td><strong>Produces Change</strong></td>
</tr>
<tr>
<td>A degree of predictability and order, and has the potential of consistently producing key results expected by various stakeholders (e.g., for customers, always being on time; for stockholders, being on budget).</td>
<td>Often to dramatic degree, and has the potential of producing extremely useful change (e.g., new products that customers want, new approaches to labor relations that help make a firm more competitive).</td>
</tr>
</tbody>
</table>

*Source: John P. Kotter, A Force for Change: How Leadership Differs from Management, pg. 6.*
Leading vs. Managing

_In this brief activity, you and your fellow participants will talk about how you're putting Kotter's theory into everyday practice._

**Management Responsibilities Performed Regularly**

1.

2.

3.

4.

5.

**Leadership Responsibilities Performed Regularly**

1.

2.

3.

4.

5.
Leading vs. Managing

Debrief Questions

1. Can you think of a time when you showed strong leadership?

2. Have you ever done a good job on the management side of things but dropped the ball on leadership? How did that affect your success?

3. Have you ever worked for someone who was good at leading or managing, but not both? What would you do differently than this person?

4. Do you feel like you've had periods where you did a great job on both the management and the leadership sides? What were your results?
3. Emotional Intelligence

The higher you go in an organization, the more important your Emotional Intelligence Quotient (EQ) becomes. In fact, it is more of a critical success factor than your Intelligence Quotient (IQ).

Indeed, people with higher emotional intelligence get promoted faster—and make more money.

In this part of the training, you'll explore the concept of emotional intelligence, and how it relates to effective leadership.

Learning Objectives
- Define the difference between IQ (the intelligence quotient) and EQ (the emotional intelligence quotient).
- Identify why EQ is so important to effective leadership.
- Identify the key competencies related to emotional intelligence.
- Assess your own emotional intelligence.
- Define ways you can improve your EQ.

Topics and Activities
- The Essentials of Emotional Intelligence
- Personal Competencies of Emotional Intelligence
- Personality Traits Inventory
- Social Competencies of Emotional Intelligence
- Emotional Intelligence Quiz
The Essentials of Emotional Intelligence

IQ, or the Intelligence Quotient, is the measure of what you know and how you process information.

EQ, or the Emotional Intelligence Quotient, is the way you use personal and social skills to work effectively alone and with others.

Why Care About EQ?

EQ is twice as important as IQ and technical skills for jobs at all levels. And in senior leadership positions, studies show that 90% of the difference between star and average performers is due to higher EQ, not higher IQ. Leaders with high EQs will get:

- Better business results
- Better retention of talent
- Higher morale
- Greater commitment

And all those, of course, lead to higher employee productivity and engagement.

The Two Facets of Emotional Intelligence

Emotional intelligence has two primary facets: personal competencies and social competencies.

Mastering the personal competencies helps you understand yourself, your emotions, and how they affect you. Mastering the social competencies helps you understand the people around you, where you fit into things, and how you can contribute to the group.

Each of these competencies can be broken down further into two key areas:

<table>
<thead>
<tr>
<th>Personal Competencies</th>
<th>Social Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-awareness</td>
<td>Social awareness</td>
</tr>
<tr>
<td>Self-management</td>
<td>Relationship management</td>
</tr>
</tbody>
</table>
Personal Competencies

Emotional intelligence begins with two personal competencies—self-awareness and self-management—that will help you understand yourself and your emotions.

Self-Awareness
Having self-awareness means you're conscious of:

- *Your emotions*—You know what you're feeling and why, when your emotions are starting to take over, and how your emotions can affect you.
- *Your strengths and weaknesses*—You know what you're good at and what you're not.

Self-Management
Traits of individuals with good self-management skills include:

- *Self-control*—You know how emotions can affect you, and you know when you need to take steps to avoid trouble.
- *Transparency*—What you see is what you get. You are open and honest about the good and the bad.
- *Flexibility*—You can adapt your behavior to meet the needs of the current situation.
- *Ambition*—You have the drive to succeed, and you know what you need to do to get there.
- *Optimism*—You see the world through rose-colored glasses.
### Personality Traits Inventory

*Indicate the frequency with which each of the following statements pertains to you by writing the appropriate response number in the corresponding blank.*

<table>
<thead>
<tr>
<th>Frequency Scale:</th>
<th>1 — Never</th>
<th>2 — Infrequently</th>
<th>3 — Sometimes</th>
<th>4 — Often</th>
<th>5—Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I have feelings of guilt and inferiority.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I am socially competent.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I welcome and look for challenges and variety.</td>
<td>___</td>
<td></td>
<td></td>
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<tr>
<td>4. I put things together in new or unusual ways.</td>
<td>___</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>5. I supervise or command.</td>
<td>___</td>
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<td></td>
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</tr>
<tr>
<td>6. I enjoy being the center of attention.</td>
<td>___</td>
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<tr>
<td>7. I show affection for others.</td>
<td>___</td>
<td></td>
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<tr>
<td>8. I de-emphasize or disregard external authority or control.</td>
<td>___</td>
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<tr>
<td>9. I punish myself.</td>
<td>___</td>
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<tr>
<td>10. I question my own worth.</td>
<td>___</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. I am able to obtain aid, service, assistance, or cooperation from others.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. I am mentally capable in a variety of areas.</td>
<td>___</td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>13. I am creative and original.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. I am competitive.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. I like to attract notice.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. I do things for and with others.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. I emphasize personal choice and freedom.</td>
<td>___</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>18. I tend to feel guilty and to express my guilt.</td>
<td>___</td>
<td></td>
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<tr>
<td>19. I am assertive.</td>
<td>___</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>20. I enjoy variety in personal and professional endeavors.</td>
<td>___</td>
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<tr>
<td>21. I am manipulative.</td>
<td>___</td>
<td></td>
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</tr>
<tr>
<td>22. I direct my own life and actions.</td>
<td>___</td>
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</tr>
<tr>
<td>23. I see others as rivals rather than potential friends or associates.</td>
<td>___</td>
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<tr>
<td>24. I treat others with kindness and understanding.</td>
<td>___</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>25. I quickly perceive another’s thoughts and the relations between these thoughts.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. I need to have a sense of belonging.</td>
<td>___</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Scoring Your Personality Inventory

After you've completed the inventory, take a few minutes to score it, using the score sheet in the Appendix (pages App-2 to App-3).

Debrief Questions
1. What surprised you?

2. Which preconceptions did the assessment reinforce?

3. What are your reactions to your personality, at least as assessed by the inventory?

4. What are some differences between your personality in this environment and your personality in your work environment? What are the similarities?

5. What did you learn about yourself that might be helpful?
Social Competencies

The social competencies of emotional intelligence allow you to look beyond yourself and see how you affect others. The two sides of social competence are social awareness and relationship management.

Social Awareness

People with high social awareness are team players. They don’t push their agendas in a way that alienates others, and they consider the feelings and needs of all parties when making decisions.

An individual with high social awareness exhibits:

- **Empathy**—You understand how others are feeling. This doesn’t mean you necessarily agree with what they’re saying, but you have the ability to see things from their perspective.

- **Organizational awareness**—You have a keen eye for the political realities, opportunities, and liabilities of the organization. You know who the movers and shakers are, and you know how to reach them.

- **Service orientation**—You know what your customers—both external and internal—need, and you know how to get it to them.

Relationship Management Skills

People with good relationship management skills are the classic “plays well with others” kids. They’re influential, trusted members of any group, and often are called upon for their ability to mediate disputes between squabbling factions without sacrificing the group’s mission.

If you have good relationship management skills you are:

- **Influential**—Colleagues and friends look to you for guidance and leadership.

- **A catalyst for change**—You’re good at seeing opportunities others might miss. You have a talent for seeing the pros and cons of a new path, and the influence to convince people to join you.

- **Good at conflict management**—You’re a born diplomat.

- **Collaborative**—You’re not one to hog all the credit. You share your ideas and find ways to incorporate other viewpoints.
Emotional Intelligence Quiz

To help you gain a better understanding of your current EQ, take the ten-question quiz below.

1. You’re on an airplane that suddenly hits extremely bad turbulence and begins rocking from side to side. What do you do?
   A. Continue to read your book or magazine, or watch the movie, trying to pay little attention to the turbulence.
   B. Become vigilant for an emergency, carefully monitoring the stewardesses and reading the emergency instructions card.
   C. A little of both A and B.
   D. Not sure - never noticed.

2. You’re in a meeting when a colleague takes credit for work that you have done.
   What do you do?
   A. Immediately and publicly confront the colleague over the ownership of your work.
   B. After the meeting, take the colleague aside and tell her that you would appreciate in the future that she credits you when speaking about your work.
   C. Nothing, it’s not a good idea to embarrass colleagues in public.
   D. After the colleague speaks, publicly thank her for referencing your work and give the group more specific detail about what you were trying to accomplish.

3. You’re a customer service representative and have just gotten an extremely angry client on the phone. What do you do?
   A. Hang-up. It doesn’t pay to take abuse from anyone.
   B. Listen to the client and rephrase what you gather he is feeling.
   C. Explain to the client that he is being unfair, that you are only trying to do your job, and you would appreciate it if he wouldn’t get in the way of this.
   D. Tell the client you understand how frustrating this must be for him, and offer a specific thing you can do to help him get his problem resolved.
Emotional Intelligence Quiz (continued)

4. You are a college student who had hoped to get an A in a course that was important for your future career aspirations. You have just found out you got a C- on the midterm. What do you do?
   A. Sketch out a specific plan for ways to improve your grade and resolve to follow through.
   B. Decide you do not have what it takes to make it in that career.
   C. Tell yourself it really doesn't matter how much you do in the course, concentrate instead on other classes where your grades are higher.
   D. Go see the professor and try to talk her into giving you a better grade.

5. You are a manager in an organization that is trying to encourage respect for racial and ethnic diversity. You overhear someone telling a racist joke. What do you do?
   A. Ignore it - the best way to deal with these things is not to react.
   B. Call the person into your office and explain that their behavior is inappropriate and is grounds for disciplinary action if repeated.
   C. Speak up on the spot, saying that such jokes are inappropriate and will not be tolerated in your organization.
   D. Suggest to the person telling the joke he go through a diversity training program.

6. You are an insurance salesman calling on prospective clients. You have left the last 15 clients empty-handed. What do you do?
   A. Call it a day and go home early to miss rush-hour traffic.
   B. Try something new in the next call, and keep plugging away.
   C. List your strengths and weaknesses to identify what may be undermining your ability to sell.
   D. Sharpen up your resume.

7. You are trying to calm down a colleague who has worked herself into a fury because the driver of another car has cut dangerously close in front of her. What do you do?
   A. Tell her to forget about it-she's OK now and it is no big deal.
   B. Put on one of her favorite tapes and try to distract her.
   C. Join her in criticizing the other driver.
   D. Tell her about a time something like this happened to you, and how angry you felt, until you saw the other driver was on the way to the hospital.
Emotional Intelligence Quiz (continued)

8. A discussion between you and your partner has escalated into a shouting match. You are both upset and in the heat of the argument, start making personal attacks which neither of you really mean. What is the best thing to do?
   A. Agree to take a 20-minute break before continuing the discussion.
   B. Go silent, regardless of what your partner says.
   C. Say you are sorry, and ask your partner to apologize too.
   D. Stop for a moment, collect your thoughts, then restate your side of the case as precisely as possible.

9. You’ve been given the task of managing a team that has been unable to come up with a creative solution to a work problem. What is the first thing you do?
   A. Draw up an agenda, call a meeting, and allot a specific period of time to discuss each item.
   B. Organize an off-site meeting aimed specifically at encouraging the team to get to know each other better.
   C. Begin by asking each person individually for ideas about how to solve the problem.
   D. Start out with a brainstorming session, encouraging each person to say whatever comes to mind, no matter how wild.

10. You’ve recently been assigned a young manager in your team, and have noticed that he appears to be unable to make the simplest of decisions without seeking advice from you. What do you do?
    A. Accept that he ‘does not have what it takes to succeed around here’ and find others in your team to take on his tasks.
    B. Get an HR manager to talk to him about where he sees his future in the organization.
    C. Purposely give him lots of complex decisions to make so that he will become more confident in the role.
    D. Engineer an ongoing series of challenging but manageable experiences for him, and make yourself available to act as his mentor.
Scoring Your Emotional Intelligence Quiz

After you've completed the quiz, take a few minutes to score it, using the score sheet in the Appendix (page App-4).

Debrief Questions

1. What are your reactions to this snapshot assessment?

2. Did any of the answers surprise you? If so, which ones, and why?

3. What did you learn about yourself that might be helpful?
4. Engagement and Motivation

People always perform better when they’re motivated and engaged. The trick is to find out what makes each person tick, because there’s no single solution. Spending the time to motivate your team is well worth the effort. When your people are motivated, they’re more productive and they’ll think you’re a great leader.

In this section of the training, you’ll learn more about engaging and motivating employees.

Learning Objectives

- Define employee engagement and why it is important.
- Identify the characteristics of engaged and disengaged employees.
- Articulate the hierarchical and orderly progression of engagement.
- Identify the key employee engagement factors and ways you can meet them.

Topics and Activities

- The Gallup Research on Engagement
- Engaged and Disengaged Employees
- Maslow’s Hierarchy of Needs
- What Motivates or Engages People?
- The Gallup Engagement Factors
The Gallup Research on Engagement

Studies consistently show that companies with employees who are engaged in their work perform better financially—and are a lot more personally fulfilled, too.

Based on research with thousands of companies and millions of employees, the Gallup Corporation believes that:

- The only way a company can have long-term success is by maintaining sustainable revenue increases...
- The only way to maintain sustainable revenue increases is to have engaged, loyal customers (or residents)...
- The only way to ensure that you have engaged, loyal customers is to have engaged, loyal employees...
- And the only way to have engaged, loyal employees is to have great managers and leaders.

The Gallup research has also revealed that business units in the top half of employee engagement show, on average:

- 86% higher customer success rate
- 70% higher success in lowering turnover
- 70% higher success rate in productivity
- 44% higher in profitability
- 78% higher success rate in safety figures

A Definition of Engagement
(Please write the definition your instructor provides.)
Engaged and Disengaged Employees

Your instructor will lead a brief discussion on the characteristics of engaged and disengaged employees. Take notes in the space provided below.

Traits of Engaged Employees

Traits of Disengaged Employees

Traits of Actively Disengaged Employees

Engaged/Disengaged Employees in the U.S. Workforce

- Engaged employees: ____________%
- Disengaged employees: ____________%
- Actively disengaged employees: ____________%
Maslow’s Hierarchy of Needs

A psychologist named Abraham Maslow theorized that human beings have different types of needs, from basic ("lower") to complex ("higher").

His theory is expressed in Maslow’s Hierarchy of Needs, often depicted as a pyramid with five levels:

- **Biological and Physiological Needs**: Basic life needs: air, water, food, shelter, warmth, sleep, etc.
- **Safety Needs**: Protection, economic security, order, law, limits, etc.
- **Belongingness and Love Needs**: Family, affection, relationships, work group, etc.
- **Esteem Needs**: Achievement, status, responsibility, reputation
- **Self-actualization**: Personal growth and fulfillment

Maslow claimed that lower needs must be met before attempting to meet the higher needs. An individual can’t focus on the higher needs until the lower needs have been satisfied.

In the same vein, an employee who worries about basic needs like getting paid or workplace safety won’t be mentally or emotionally available to work on career advancement or continuing education.

Once the lower needs are satisfied, the ability to meet higher needs is what separates the engaged employee from the disengaged employee. And when lower needs go unsatisfied, you’re going to have an actively disengaged employee on your hands.
What Motivates or Engages People?

*Split up into pairs, and then discuss this question with your partner.*

Think of a job in which you were thoroughly engaged. You really enjoyed it, looked forward to it, did a good job of it, etc. What was it about that job that really made it great for you?
The Gallup Engagement Factors

Much like Maslow, the Gallup Organization has identified a hierarchy of needs to engage employees.

And it is a hierarchy—as a leader, you need to meet the basic needs before you can step up to the loftier goals, like organizational vision and mission. Here are those needs in order, and what you can do to satisfy them.

**Need #1: “I know what’s expected of me when it comes to responsibilities and results.”**

1. Define the right outcomes. Don’t fixate on the “right” steps. Let your employees find their own path. The steps aren’t important, the outcome is.
2. Communicate. Tailor the communication to the needs of the individual. Some need more details and want more control. Others prefer to understand the big picture with fewer details and more purpose.
3. Give folks the “why” behind your expectations.
4. Give feedback. What went well? What could have gone better?

**Need #2: “The work that I do is a good fit with my skills.”**

1. Select for talent.
2. Match the role to the talent.
3. Clarify roles.
4. Be sure you’re not limiting your employees.
5. Build on strengths rather than fixing weaknesses.

**Need #3: “I am satisfied with the recognition I receive for doing a good job.”**

1. Remember that recognition can be positive or negative. Great managers do not treat them as opposites. The opposite of recognition is being ignored.
2. Be positive, timely, and genuine.
3. Be specific about what is being praised.
4. Don’t rely on formal recognition programs. Personal recognition is far more effective.
5. Encourage team members to praise each other as well.
The Gallup Engagement Factors (continued)

Need #4: “There is someone at work who encourages my development.”
1. Encourage your team to expand their skills and talents, not just fix their weaknesses.
2. Give them the tools and the support they need to develop.

Need #5: “At work, my opinions seem to count.”
1. Validate and encourage ideas from everyone. When people feel supported, they’re willing to take more risks. You never know when the craziest idea will be the best.
2. Encourage employees to “question authority” in a constructive way. They can make you a better leader/manager.

Need #6: “I feel my job is important?”
1. Make sure employees see how their jobs fit into the bigger picture.
2. Encourage them to take full ownership of the items for which they are responsible.

Need #7: “I receive the feedback I need to improve my performance.”
1. Give regular, informal feedback—positive and negative—to help motivate employees to keep improving.
2. Review progress formally every six months so employees can set goals and keep building on their strengths.

Need #8: “In the last year, I have had opportunities at work to learn and grow?”
1. Set an example by taking continuing education courses.
2. Support employees’ efforts to learn more. It will help them grow and innovate.
5. Feedback and Coaching

Most managers are good at “telling” people what to do, but need to develop better feedback, listening, and questioning skills to help people develop.

If you are good at feedback and coaching, you’ll have fewer disciplinary problems — and your people will be more productive (making you more successful as a leader).

In this part of the course, you’ll learn an effective way to give feedback and provide coaching to employees.

Learning Objectives

- Define the following terms and phrases: managing, supervising, giving feedback, coaching, and disciplining.
- Explain the Situation/Behavior/Impact (SBI) model for feedback and apply it to real-world situations.
- Describe the difference between feedback and coaching.
- Articulate the five-step coaching model and apply it to real-world situations.

Topics and Activities

- Key Definitions
- Feedback Fundamentals
- Evaluating Feedback
- Coaching
- The Basic Coaching Process
- Group Coaching Activity
Key Definitions

Managing, coaching, or disciplining? Supervisor or coach? Before we dive into the specifics of giving feedback and coaching others, let's define a few important terms.

**Managing / Supervising:** “To exercise executive, administrative, and supervisory direction on—-to direct the professional career of.” Basically, it is telling your employees what, when, and how to do what they do.

**Feedback:** The process of describing to another person how his or her behavior affects you, others, or the accomplishment of a task.

**Coaching:** A method of conversation that creates a climate and context to gives individuals and groups more confidence—and puts them into position to act on the specific goals they are committed to achieving.

**Coach:** A person who facilitates the learning that results in future-oriented activities. He or she is a trusted role model, advisor, friend, steward, or guide. A leader can be any of these.

**Disciplining:** The process used to address substandard work performance or stop unwanted behavior. Performance has reached a stage where immediate corrective measures are required.
The SBI Model for Feedback

For some people, providing feedback (either good or bad) is a difficult thing to do. But there is a simple process that makes it easier and more effective.

It's called the Situation/Behavior/Impact (or SBI) model.

1. **Situation**: Capture the situation.
2. **Behavior**: Describe the behavior.
3. **Impact**: Deliver your perception of the impact or result of the behavior. The classic statement in this format is, “When you did X, it made me feel Y.”

Then, after delivering this message, explore the feedback with the employee by letting the employee comment or ask for clarification.

**Examples**

Let's look at a couple of SBI examples:

1. **Situation**: “I’m glad you came to the staff meeting yesterday.”
2. **Behavior**: “You were half an hour late.”
3. **Impact**: “I felt like you didn’t think our discussion was important.”

Or how about this example of positive feedback? (Remember, you need to be doling out the good stuff, too!)

1. **Situation**: “You know, you were the MVP of the staff meeting yesterday.”
2. **Behavior**: “Your budget research was both through and accurate—and three days early!”
3. **Impact**: “I’m really fortunate to have you on my team. You make everyone's job much easier.”

**Why the SBI Model Works**

- It's specific about the employee's behavior.
- It has your perception of the impact of the employee's behavior, which makes it much harder for the employee to be defensive. It's hard to argue about someone else's perception.
The SBI Model for Feedback (continued)

Tips for Giving Feedback

- *Give feedback as soon as possible.* That's when it's most effective.

- *Keep your statements simple.* Reduce the feedback to the essential elements.

- *Be sincere.* Employees know when you're not.

- *If there's a pattern of behavior you want to reinforce or correct, give feedback frequently.* It's better to deal with ongoing issues regularly than to have a "discussion" every six months at review time.

- *Feedback is a two-way street.* It is only useful if the recipient is open to listening. But the feedback-giver (you) should be inviting dialogue, too.

- *Receiving feedback is just as difficult, if not more so, than delivering it.* It’s not comfortable for us to hear someone tell us that we didn’t do something well, regardless of what it is.
Evaluating Feedback

*Now, your instructor will give you the chance to give and evaluate some feedback. Stay tuned to see what you’ll be doing!*  

Debrief Questions

1. Did most of the feedback use the SBI model?

2. Why or why not?

3. How could you improve some of the feedback?
Coaching

When managing, we do most of the talking. When coaching, we want the other person to do most of the talking.

Why Coach?
- **Performance**: To improve, maintain, or exceed work performance. This is the leader's responsibility.
- **Development**: To provide guidance to the employee's general development or career development goals. This is the joint responsibility between a leader and an employee.

The Basic Coaching Process
Whatever the reason for the coaching, the basic process is the same:

1. Open the meeting.
2. Gain agreement on the performance or development issue.
3. Explore alternatives.
4. Get commitment to act.
5. Close the meeting.

Let's look at each step in greater depth.
The Basic Coaching Process

The key to effective coaching is that person being coached does the majority of the talking. The coach’s role is to listen and guide the conversation through questions.

One: Open the Meeting
- Plan the meeting by making an appointment.
- Establish the reason for the meeting in a clear, non-accusatory manner.
- Remove judgment.

Two: Gain Agreement on the Performance or Development Issue.
If the problem is a performance issue:
- Use the SBI model to state the performance problem.
- Be sure you come prepared with concrete examples. “I’ve heard complaints that you’re often late” isn’t as useful as “You were 20 minutes late to our last board meeting, and 45 minutes late to the staff meeting yesterday.”

If the problem is a development issue:
- Clarify through open-ended questions what the employee wants or needs to develop.
- Establish whether the employee’s goal is to move up in the organization and determine the skills she would need to work on to meet her goals.
- Reach agreement with the employee on what she should focus on.

If the employee is resistant to or disagrees with the feedback:
- Reiterate your expectations and the consequences of not meeting them.
- Probe the employee to get her to articulate her understanding of the consequences.
- Ask the employee if she agrees that the issue is worth discussing.
- Repeat the process a few times to reach agreement.
- If you can’t reach agreement, end the coaching process. Change your focus to the consequences of the behavior.
The Basic Coaching Process (continued)

Three: Explore Alternatives
- Help the employee set goals that challenge his skills.
- Allow the employee to suggest a plan of action.
- Discuss the pros and cons of each suggestion.
- Ask questions to help broaden the employee’s perspective.
- Listen, listen, listen.
- Allow the employee to take ownership of the solution. People are more likely to follow through on their own ideas.

Four: Get Commitment to Act
- Use the SMART model for goals—Specific, Measurable, Attainable, Results-Oriented, and Time-Bound.
- Encourage the employee to set intermediate goals to help her stay focused as she progresses.
- Determine how the goal will be measured. How will you know if she’s achieved it?

Five: Close the Meeting
- Summarize the discussion.
- Thank the employee for his contributions to the conversation.
- Let the employee know you will follow-up.
- Set a date on the calendar for your next meeting and continue to provide feedback along the way.
Group Coaching Activity

*In this activity, you and your fellow participants will get a chance to do a little group coaching. Your instructor will take you through this eye-opening exercise.*

The Situation
You're the supervisor of a community manager who has worked at one of your properties for two years. In the last two months, he has had an unusual number of days when he was late coming to work, or didn't come at all—without notice.

You're concerned but also do not want it to become a larger issue. As his supervisor, it is your responsibility to give feedback and coach him on his recent attendance issues.

Debrief Questions:
1. Have any of you been in a similar situation before? What did you do, and how did it work?

2. Did you have difficulty avoiding the trap of just “telling” the person what to do and helping him or her come up with their own solutions?

3. What worked well, and what didn’t work so well in this role-play?

4. Is there anything you plan on doing differently the next time you are in a similar situation? Why?
6. Teambuilding

Just like individuals, teams that have “group emotional intelligence” will be more successful. As a leader, you will be judged more by how your team performs than how you perform as an individual.

In this part of the training, you’ll learn techniques for building a more effective, productive team.

Learning Objectives

- Define the key characteristics of a team and what makes a team different from other working groups.
- Articulate the key competencies related to team emotional intelligence.
- List the main reasons why teams can go off track and derail.
- Identify the four stages of team development.
- Identify practical ways that you can help teams in these four stages of development.
- Practice building a team from the ground-up by completing the “Survivor” activity.

Topics/Activities

- What is a Team?
- Is an Apartment Community a Team?
- The Emotionally Intelligent Team
- The Team Competencies of Emotional Intelligence
- The Organizational Competencies of Emotional Intelligence
- Team Derailers
- Creating Team Emotional Intelligence
- The Forming Stage
- The Storming Stage
- The Norming Stage
- The Performing Stage
- “Survivor” Activity
What is a Team?

Not all groups are teams. What separates a “Team” from other “Working Groups”? Consider this excerpt from an article called “The Discipline of Teams.”

Working groups are both prevalent and effective in large organizations where individual accountability is most important. The best working groups come together to share information, perspectives, and insights; to make decisions that help each person do his or her job better; and to reinforce individual performance standards. But the focus is always on individual goals and accountabilities. Working group members don’t take responsibility for results other than their own.

Teams differ fundamentally from working groups because they require both individual and mutual accountability. Teams rely on more than group discussion, debate, and decision; on more than sharing information and best practice performance standards. Teams produce discrete work products through the joint contributions of their members. This is what makes possible performance levels greater than the sum of all the individual bests of team members. Simply stated, a team is more than the sum of its parts...

...A team is comprised of a small number of people, with complementary skills who are committed to a common purpose, performance goals and approach for which they hold themselves mutually accountable...

The essence of a team is common commitment. Without it, groups perform as individuals; with it, they become a power unit of collective importance.

Is an Apartment Community Staff a Team?

This activity is based on key words (shown in the table below) from the quote on the previous page. In your small groups, discuss these questions:

1. Do these key words apply to the people working in an apartment community?

2. How do these key words apply? Can you give specific examples?

<table>
<thead>
<tr>
<th>Key Words</th>
<th>Do these words apply to an apartment community?</th>
<th>How do these words apply? (Give specific examples)</th>
</tr>
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<tbody>
<tr>
<td>Small number of people</td>
<td></td>
<td></td>
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<tr>
<td>Complementary skills</td>
<td></td>
<td></td>
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<tr>
<td>Committed to a common purpose</td>
<td></td>
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<tr>
<td>Common performance goals</td>
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<td></td>
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<tr>
<td>Common approach</td>
<td></td>
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<tr>
<td>Mutually accountable</td>
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</table>
Emotional intelligence applies to teams, too. Consider this excerpt from an article called “Building the Emotional Intelligence of Groups.”

Study after study has shown that teams are more creative and productive when they can achieve high levels of participation, cooperation, and collaboration among members. But interactive behaviors like these aren’t easy to legislate… Three basic conditions need to be present before such behaviors can occur: mutual trust among members, a sense of group identity (a feeling among members that they belong to a unique and worthwhile group), and a sense of group efficacy (the belief that the team can perform well and that group members are more effective working together than apart).

At the heart of these three conditions are emotions. Trust, a sense of identity, and a feeling of efficacy arise in environments where emotion is well handled, so groups stand to benefit by building their emotional intelligence.

Group emotional intelligence isn’t a question of dealing with a necessary evil—catching emotions as they bubble up and promptly suppressing them. Far from it. It’s about bringing emotions deliberately to the surface and understanding how they affect the team’s work. It’s also about behaving in ways that build relationships both inside and outside the team and that strengthen the team’s ability to face challenges. Emotional intelligence means exploring, embracing, and ultimately relying on emotion in work that is, at the end of the day, deeply human.


**EQ: Individuals vs. Teams**

<table>
<thead>
<tr>
<th>Individual EQ Competencies</th>
<th>Team EQ Competencies</th>
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<tbody>
<tr>
<td>Self-awareness</td>
<td>Team awareness</td>
</tr>
<tr>
<td>Self-management</td>
<td>Team management</td>
</tr>
<tr>
<td>Social awareness</td>
<td>Organizational awareness</td>
</tr>
<tr>
<td>Relationship management</td>
<td>Organizational management</td>
</tr>
</tbody>
</table>
Team Competencies

Team emotional intelligence begins with two competencies—team awareness and team management—that team members need to understand and embrace.

Team Awareness

- **Emotional awareness (individual members and team)**—Consists of understanding the emotions and behavioral tendencies of other team members, and knowing how others react to things. Also includes an awareness of the team’s own personality. Highly aware teams know the emotional state of the team—low morale, high engagement, and so on.

- **Knowledge of strengths and weaknesses**—The team knows what it’s good at, and where it might have blind spots.

- **Common strategy, purpose, and commitment**—Everyone on the team knows what’s expected, and they have shared goals and accountability.

Team Management

- **Trust and respect**—Team rules and values promote trust and respect among all members.

- **Clear roles and responsibilities**—The team has established—and the members understand—everyone’s individual and shared responsibilities. Who’s responsible for renewals? Who handles HVAC service requests? Who makes sure all the lights are off and things locked up at night? And so on.

- **Internal communication**—There is open and honest communication among all team members. Conflict is not avoided, but is resolved in a caring, respectful manner.
Organizational Competencies

The organizational competencies of emotional intelligence allow teams to look beyond themselves and see how they affect the organization. The two facets of organizational competence are organizational awareness and organizational management.

Organizational Awareness

- **Alignment of team purpose and organizational vision**—Team members understand how their team fits within the larger organization, and how they support the company’s mission, vision, and strategy. They can answer this question: How does this apartment community meet the company’s commitment to shareholders, customers, and employees?

- **Service orientation**—The team knows who its customers are, both internally and externally. An apartment community team has residents, but it also must work with the pricing department, human resources, vendors, and so on. Team members not only know the service needs of their customers, but also the emotional state and behavioral tendencies of their customers, which allows the team to deliver what the customer wants and how the customer wants it. For example: “How are residents going to respond to the repaving of the parking lot?” “How will the pricing department respond if I am late in reporting?”

- **Political/social awareness**—The team is politically savvy, understanding which people and groups can have an impact on their success—and the team uses this knowledge to improve performance. Examples: Who’s the right person to go to if we have a problem with procurement? Who makes the decisions on capital projects?

Organizational management

- **Building collaboration, cooperation with other groups/teams**—The team develops good working relationships with other groups and teams, such as corporate departments, regional and area groups, other properties, and so on. Examples: Does the team work well with marketing when there is a need to increase traffic? How does the apartment community get along with its vendors?

- **External communication**—There is open and honest communication between the team and other groups/teams. Intergroup conflict is not avoided, but is resolved in a caring, respectful manner.
Team "Derailers"

Each of the "derailers" relates to a particular team emotional intelligence competency. But which one? Fill in the answers during the group discussion.

<table>
<thead>
<tr>
<th>Common Derailer</th>
<th>Team Emotional Intelligence Competency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of clear purpose and mission</td>
<td></td>
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<tr>
<td>Egos</td>
<td></td>
</tr>
<tr>
<td>Lack of trust and respect</td>
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<tr>
<td>Unresolved conflict</td>
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<tr>
<td>Lack of clarity of responsibilities</td>
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<tr>
<td>Putting personal goals ahead of team goals</td>
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<tr>
<td>Lack of communication</td>
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<tr>
<td>Lack of direction</td>
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<tr>
<td>Poor leadership</td>
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Team derailers can lead to a "me first" attitude among team members. When people are looking out only for themselves, conflict arises and stays unresolved, which lowers morale and engagement. The discord makes it difficult for people to meet any goals at all—team or individual.
Creating Team Emotional Intelligence

When a group of people is first formed into a team, their roles and interactions are not established. Some people may stay on the sidelines while they try to determine where they fit into things, while others may engage the process immediately.

As team members learn to understand and embrace their roles—and learn about team issues—they find ways to work with one another, developing into a cohesive group with team emotional intelligence.

The Four Stages of Team Development

<table>
<thead>
<tr>
<th>Stage</th>
<th>Major Activity</th>
<th>Often Characterized By:</th>
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<tbody>
<tr>
<td>Forming</td>
<td>Clarifying the task and getting the members acquainted</td>
<td>• Cautious, guarded interaction&lt;br&gt;• Anxiety&lt;br&gt;• Exploring and testing boundaries&lt;br&gt;• Uncertainty&lt;br&gt;• Lack of trust</td>
</tr>
<tr>
<td>Storming</td>
<td>Encouraging the expression of different viewpoints in a constructive manner and resolving the natural competition for influence among the team members</td>
<td>• Resistance to different approaches&lt;br&gt;• Competitiveness and defensiveness&lt;br&gt;• Conflict&lt;br&gt;• Poor communication&lt;br&gt;• Tension and disunity</td>
</tr>
<tr>
<td>Norming</td>
<td>Establishing the team’s standards for performance and the unwritten rules that govern members’ behaviors</td>
<td>• Developing trust and respect&lt;br&gt;• Finding common interests and goals&lt;br&gt;• Open and honest communication/feedback&lt;br&gt;• Clear roles and responsibilities</td>
</tr>
<tr>
<td>Performing</td>
<td>Accomplishing the tasks and fulfilling the team’s mission</td>
<td>• High level of interaction&lt;br&gt;• Members comfortable with each other and are mutually supportive&lt;br&gt;• Increased performance&lt;br&gt;• Confidence and optimism</td>
</tr>
</tbody>
</table>

This transition is not necessarily a one-time process. Teams may cycle through the stages over and over again depending on the composition of the team and the issues that they identify.
The Forming Stage

This forming stage of team development is an exploration period.

Team members are often cautious and guarded in their interactions, not knowing what to expect from other team members. This is where the team awareness process starts. Members explore the boundaries of acceptable behavior and start to develop perceptions of others.

Helping a Team Get Through this Stage

- *Share relevant information.* Keep members up-to-date on what’s going on, what’s changing (at the apartment community or on the team), and let them know why.
- *Encourage open dialogue.* Help members bring concerns and issues out into the open so they can be addressed.
- *Provide structure.* Lay out clear assignments and performance requirements to help members understand what you expect of them.
- *Direct team issues.* Take a more hands-on approach to addressing problems and project management while members develop the skills to become more self-directing.
- *Develop a climate of trust and respect.* Establish team norms and rules of behavior, and model trustworthy, respectful behaviors to the members.

Specific Activities You Can Undertake

*List ideas from group discussion*
The Storming Stage

This storming stage is characterized by competition and strained relationships.

The team starts to define roles and responsibilities. Barriers to teamwork start to surface: control issues, clashes in working styles, conflicts between members, lack of trust, communication deterioration, and blame.

Helping a Team Get Through this Stage

- *Engage team members in joint problem solving.* Conduct brainstorming sessions and open discussions of problem areas. Involve the entire team in the process.
- *Establish norms for looking at different viewpoints.* Set out rules of behavior to encourage open and honest discussion in a non-threatening, non-judgmental manner.
- *Discuss decision-making procedures.* Help members understand their individual roles and expectations.
- *Support collaborative team efforts.* Create mixed teams of maintenance, leasing, and office employees to work on projects. Conduct teambuilding activities.

Specific Activities You Can Undertake

*List ideas from group discussion*
The Norming Stage

The norming stage is characterized by cohesiveness among team members.

After working through the storming stage, team members discover that they do, in fact, have common interests and common goals.

Communication appears more open and honest, and roles and responsibilities start to become identified and accepted. The team discovers their common purpose and commitment, and their place within the rest of the organization.

Helping a Team in this Stage

- *Talk openly about issues and concerns.* Reinforce mutual understanding and open communication.

- *Encourage members to manage the team process.* Delegate more responsibilities and give the members more freedom to decide how work gets done.

- *Give positive and constructive feedback.* Model open communication and reinforce good performance.

- *Support consensus decision-making efforts.* Build team “buy-in,” engagement, and collaboration.

Specific Activities You Can Undertake

*(List ideas from group discussion)*
The Performing Stage

The performing stage is characterized by team members working together as a fully functioning team.

They can define tasks, work out their relationships successfully, manage conflict, and work together to accomplish their mission. It is the result of successfully completing the first three stages.

The team now has a sense of its own identity, and team members are committed to the team and its goals. These goals are aligned with the organization’s vision. The team is viewed as a valued partner with other groups and teams within the organization. There is trust among members, a sense of team identity, and a sense that the team is greater than the sum of its parts.

They have achieved the essential conditions for team effectiveness—and emotional intelligence.

Keeping a Team in this Stage

- Encourage ongoing self and team assessment. Observe the team and offer feedback when requested.
- Develop team members to their fullest potential. Coach them and help them grow.
- Look for ways to increase the team’s capacity. Support new ideas and ways for achieving positive outcomes.

Specific Activities You Can Undertake

(List ideas from group discussion)
"Survivor" Activity

Now that we’ve talked about the stages a team goes through to become a high performing group, you’re going to get a chance to create your own team, right in this classroom.

You'll be completing an activity called "Survivor." And you'll have fun with it.

Debrief Questions

1. Were you able to act as an emotionally intelligent team? Were you able to reach “synergy”? (2+2=5)

2. What worked well in your team? What didn’t? What would you do differently?

3. What emotional intelligence competencies did you have? Which (if any) were missing?

4. Even though it was a short time - What stages of team development did you go through? Which ones (if any) didn't you get through?
7. Action Plan and Closing

You’ve just spent an entire day learning about leadership. Now, it’s time to make the most of your newfound knowledge by taking action on what you’ve learned.

In this part of the training, you’ll create an action plan for improving your leadership skills, and in particular, your emotional intelligence.

**Learning Objectives**
- Reflect on what you’ve learned today.
- Write an action plan to strengthen your leadership skills.

**Topics**
- Leadership Action Plan
Leadership Action Plan

*It's time to bring home all that you've learned in this course.*

You now know:

- You need to improve your emotional intelligence if you want to be a better leader.
- You have emotional intelligence strengths and areas of opportunity.
- You can use various tools to improve your emotional intelligence.

Now, put it all together and develop an action plan for improving your emotional intelligence—and consequently, your leadership skills.

**My Development Goals**

<table>
<thead>
<tr>
<th>Issue</th>
<th>Goals/Objectives</th>
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<tbody>
<tr>
<td>Emotional Intelligence</td>
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<td>Engagement and Motivation</td>
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<tr>
<td>Feedback and Coaching</td>
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<tr>
<td>Teambuilding</td>
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## My Action Plan

<table>
<thead>
<tr>
<th>Goals/Objectives</th>
<th>Action Steps</th>
<th>Timeline/Date</th>
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Appendix: Table of Contents

Materials for the "Emotional Intelligence" Section
- Personality Traits Inventory: Scoring And Interpretation Sheet
- Scoring Your Emotional Intelligence Quiz
- Emotional Intelligence Quiz Explanation

Materials for the Teambuilding Section
- How Emotionally Intelligent is Your Team?
- Survey on Team Emotional Intelligence Scoring Sheet
Personality Traits Inventory: Scoring & Interpretation Sheet

The Personality Traits Inventory consists of 26 statements that are descriptive of various human characteristics.

The respondent is asked to indicate, on a scale of one to five, how frequently each statement applies to himself or herself. Buried within these statements are eight separate personality traits. Final scoring results in a measure of the degree to which each trait describes the person in question.

To determine your scores for the eight traits, write your responses for the appropriate item numbers in the spaces provided below. Add your responses for each trait and divide by the number provided. The resulting number is your score for that particular trait. A score of 5 means that the trait is highly descriptive of you, whereas a score of 1 means that the trait is not at all descriptive of you.

**Tendency to Feel Inferior** (low sense of self-worth)

1.  
9.  
10.  
18.

TOTAL ______ ÷ 4 = _____

**Social Competence** (ability to be at ease with, to cooperate with, and to gain cooperation from others)

2.  
11.  
19.

TOTAL______ ÷ 3 = _____

**Preference for Variety** (eagerness for new or different endeavors; ability to adjust easily to change)

3.  
12.  
20.

TOTAL______ ÷ 3 = _____
Creativity (originality in thoughts and actions; ability to rearrange existing things into new patterns)

4.
13.

TOTAL_____ ÷ 2 = _____

Desire to Dominate (tendency to compete, to view others as rivals, to manipulate, and to assume control of situations)

5.
14.
11.
23.

TOTAL_____ ÷ 4 = _____

Exhibition (desire to attract notice and to be the center of attention)

6.
15.

TOTAL_____ ÷ 2 = _____

Affiliation (need to feel a sense of belonging, to do things for and with others, and to be kind)

7.
16.
24.
26.

TOTAL_____ ÷ 4 = _____

Autonomy (tendency to direct own life and actions, to exercise personal choice and freedom, and to disregard external authority and control)

8.
17.
22.
25.

TOTAL_____ ÷ 4 = ______
Scoring Your Emotional Intelligence Quiz

Compare the answers you checked on your quiz to the list below. Determine the number of points associated with the answer you gave and enter this number in the right hand column of your scoring sheet. Total your points at the bottom of the page.

1) A = 10  6) A = 0
   B = 10       B = 10
   C = 10       C = 5
   D = 0  ________ points   D = 0  ________ points

2) A = 0  7) A = 0
   B = 5       B = 0
   C = 0       C = 5
   D = 10  ________ points   D = 10  ________ points

3) A = 0  8) A = 10
   B = 5       B = 0
   C = 0       C = 0
   D = 10  ________ points   D = 0  ________ points

4) A = 10  9) A = 0
   B = 0       B = 10
   C = 5       C = 0
   D = 0  ________ points   D = 5  ________ points

5) A = 0  10) A = 0
   B = 5       B = 5
   C = 10      C = 0
   D = 5  ________ points   D = 10  ________ points

___________  Total Points

What Your Score Means

This quiz is designed to measure how well you currently comprehend the concept of emotional intelligence. 100 points is the highest score and 50 is average.
**Emotional Intelligence Quiz Explanation**

*Expand your knowledge of EQ by reading the explanation behind the choices presented in the quiz.*

1. **The Turbulent Airplane:**

   Anything but D - that answer reflects a lack of awareness of your habitual responses under stress. Actively acknowledging your stress and finding ways to calm yourself (i.e. engage in a book or read the emergency card) are healthier responses.

   - [A] 10 Points - Continue to read your book or magazine, or watch the movie, trying to pay little attention to the turbulence.
   - [B] 10 Points - Become vigilant for an emergency, carefully monitoring the stewardesses and reading the emergency instructions card.
   - [C] 10 Points - A little of both A and B.
   - [D] 0 Points - Not sure - never noticed.

2. **The Credit-stealing Colleague:**

   The most emotionally intelligent answer is D. By demonstrating an awareness of workplace dynamics, and an ability to control your emotional responses, publicly recognizing your own accomplishments in a non-threatening manner, will disarm your colleague as well as puts you in a better light with your manager and peers. Public confrontations can be ineffective, are likely to cause your colleague to become defensive, and may look like poor sportsmanship on your part. Although less threatening, private confrontations are also less effective in that they will not help your personal reputation.

   - [A] 0 Points - Immediately and publicly confront the colleague over the ownership of your work.
   - [B] 5 Points - After the meeting, take the colleague aside and tell her that you would appreciate in the future that she credits you when speaking about your work.
   - [C] 0 Points - Nothing, it's not a good idea to embarrass colleagues in public.
   - [D] 10 Points - After the colleague speaks, publicly thank her for referencing your work and give the group more specific detail about what you were trying to accomplish.
Emotional Intelligence Quiz Explanation

3. The Angry Client:
The most emotionally intelligent answer is D. Empathizing with the customer will help calm him down and focusing back on a solution will ultimately help the customer attain his needs. Confronting a customer or becoming defensive tends to anger the customer even more.

[A] 0 Points - Hang-up. It doesn't pay to take abuse from anyone.
[B] 5 Points - Listen to the client and rephrase what you gather he is feeling.
[C] 0 Points - Explain to the client that he is being unfair, that you are only trying to do your job, and you would appreciate it if he wouldn't get in the way of this.
[D] 10 Points - Tell the client you understand how frustrating this must be for him, and offer a specific thing you can do to help him get his problem resolved.

4. The "C" Midterm:
The most emotionally intelligent answer is A. A key indicator of self-motivation, also known as Achievement motivation, is your ability to form a plan for overcoming obstacles to achieve long-term goals. While focusing efforts on classes where you have a better opportunity may sometimes be productive, if the goal was to learn the content of the course to help your long-term career objectives, you are unlikely to achieve.

[A] 10 Points - Sketch out a specific plan for ways to improve your grade and resolve to follow through.
[B] 0 Points - Decide you do not have what it takes to make it in that career.
[C] 5 Points - Tell yourself it really doesn't matter how much you do in the course, concentrate instead on other classes where your grades are higher.
[D] 0 Points - Go see the professor and try to talk her into giving you a better grade.
Emotional Intelligence Quiz Explanation

5. The Racist Joke:
The most emotionally intelligent answer is C. The most effective way to create an atmosphere that welcomes diversity is to make clear in public that the social norms of your organization do not tolerate such expressions. Confronting the behavior privately lets the individual know the behavior is unacceptable, but does not communicate it to the team. Instead of trying to change prejudices (a much harder task), keep people from acting on them.

[A] 0 Points - Ignore it - the best way to deal with these things is not to react.
[B] 5 Points - Call the person into your office and explain that their behavior is inappropriate and is grounds for disciplinary action if repeated.
[C] 10 Points - Speak up on the spot, saying that such jokes are inappropriate and will not be tolerated in your organization.
[D] 5 Points - Suggest to the person telling the joke he go through a diversity training program.

6. The Setback of a Salesman:
The most emotionally intelligent answer is B. Optimism and taking the initiative, both indicators of emotional intelligence, lead people to see setbacks as challenges they can learn from, and to persist, trying out new approaches rather than giving up, blaming themselves or getting demoralized. Although listing your strengths and weaknesses can be a helpful exercise, without actively plugging away motivation to sell will tend to decrease.

[A] 0 Points - Call it a day and go home early to miss rush-hour traffic.
[B] 10 Points - Try something new in the next call, and keep plugging away.
[C] 5 Points - List your strengths and weaknesses to identify what may be undermining your ability to sell.
[D] 0 Points - Sharpen up your resume.
Emotional Intelligence Quiz Explanation

7. The Road-rage Colleague:
The most emotionally intelligent answer is D. All research shows that anger and rage seriously affect one's ability to perform effectively. Daniel Goleman, in his book WWEI, coined the phrase "amygdala hijacking" to describe the process of losing one's temper in this kind of situation. Your ability to avoid or control this emotional reaction in yourself and others, is a key indicator of emotional intelligence. In the road rage scenario, any attempt to calm down your colleague by distracting him away from the effects of the amygdala hijack will have a positive impact on the situation and his behavior, particularly if you are able to effectively empathize with him.

[A] 0 Points - Tell her to forget about it-she's OK now and it is no big deal.
[B] 0 Points - Put on one of her favorite tapes and try to distract her.
[C] 5 Points - Join her in criticizing the other driver.
[D] 10 Points - Tell her about a time something like this happened to you, and how angry you felt, until you saw the other driver was on the way to the hospital.

8. The Shouting Match:
The most emotionally intelligent answer is A. In these circumstances, the most appropriate behavior is to take a 20-minute break. As the argument has intensified, so have the physiological responses in your nervous system, to the point at which it will take at least 20 minutes to clear your body of these emotions of anger and arousal. Any other course of action is likely merely to aggravate an already tense and uncontrolled situation.

[A] 10 Points - Agree to take a 20-minute break before continuing the discussion.
[B] 0 Points - Go silent, regardless of what your partner says.
[C] 0 Points - Say you are sorry, and ask your partner to apologize too.
[D] 0 Points - Stop for a moment, collect your thoughts, then restate your side of the case as precisely as possible.
Emotional Intelligence Quiz Explanation

9. The Uninspired Team:
The most emotionally intelligent answer is B. As a leader of a group of individuals charged with developing a creative solution, your success will depend on the climate that you can create in your project team. Creativity is likely to be stifled by structure and formality; instead, creative groups perform at their peaks when rapport, harmony and comfort levels are most high. In these circumstances, people are most likely to make the most positive contributions to the success of the project.

[A] 0 Points - Draw up an agenda, call a meeting and allot a specific period of time to discuss each item.
[B] 10 Points - Organize an off-site meeting aimed specifically at encouraging the team to get to know each other better.
[C] 0 Points - Begin by asking each person individually for ideas about how to solve the problem.
[D] 5 Points - Start out with a brainstorming session, encouraging each person to say whatever comes to mind, no matter how wild.

10. The Indecisive Young Manager:
The most emotionally intelligent answer is D. Managing others requires high levels of emotional intelligence, particularly if you are going to be successful in maximizing the performance of your team. Often, this means that you need to tailor your approach to meets the specific needs of the individual, and provide them with support and feedback to help them grow in confidence and capability.

[A] 0 Points - Accept that he ‘does not have what it take to succeed around here' and find others in your team to take on his tasks.
[B] 5 Points - Get an HR manager to talk to him about where he sees his future in the organization.
[C] 0 Points - Purposely give him lots of complex decisions to make so that he will become more confident in the role.
[D] 10 Points - Engineer an ongoing series of challenging but manageable experiences for him, and make yourself available to act as his mentor.

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How Emotionally Intelligent is Your Team?

The first step in developing a more effective team is determining where they currently are in terms of their emotional intelligence competencies and their stage of development.

A Survey on Team Emotional Intelligence

Provide each team member with a copy of the survey. Individuals should answer each question based on their own experience with the team.

When all participants have completed their responses, distribute a copy of the Scoring Sheet and a calculator to each team. The Scoring Sheet allows the team to record the number and percentage of individuals responding in each category. The team will also determine the percentage of favorable response scores. The percentage of favorable response score indicates the number of responses in the two highest categories. Ask the team to review the Scoring Sheet examples and respond to any questions team members have about the scoring process.

The twenty-four questions are organized by the four Team Emotional Intelligence dimensions of Team Awareness, Team Management, Organizational Awareness, and Organizational Management. Higher scores within one of those categories would indicate a higher level of development within that dimension. Lower scores would indicate that the relationship and process requirements of that dimension have not been fully addressed. A focus on the behaviors of each question may suggest actions that the team can take to further develop within that dimension.
**Instructions:**

Consider the activities within your team as you have worked together on assigned tasks in the past. Using the six-point scale below, indicate your level of agreement with each of the behavioral statements. How strongly do you agree or disagree that this particular team achieves the behavior described in each statement? Use the scale below and circle the response that most clearly matches what you believe to be true.

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<td>Agree</td>
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**Team Awareness:**

1. Team members invest time to get to know one another better.  
2. Team members often evaluate team functioning or process.  
3. Team members are highly motivated to work towards common goals.  
4. Team members share a common purpose.  
5. Team members believe they are more successful as a team than as a group of individuals.  
6. Team shares responsibility for problem solving.

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**Team Management:**

7. Conflict is dealt with openly and worked through.  
8. Team members openly share perspectives and discuss differences.  
9. Criticism is constructive and not framed as a personal attack.  
10. High levels of trust exist among team members.  
11. Established ground rules are honored, even during times of stress.  
12. Roles and responsibilities are clarified and agreed to by team members.

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**Organizational Awareness:**

13. Team members understand how their efforts help achieve the goals of the organization.  
14. Team members understand how their team effectively interacts with other teams/groups.  
15. Team members understand how their team fits within the overall organizational structure.  
16. The team understands the needs of internal and external “customers.”  
17. Team members are very familiar with the organizational culture and “how to get things done.”  
18. Team members have identified those outside the team who can influence the team’s ability to accomplish its goals.

**Organizational Management:**

19. The team effectively coordinates its work with work performed by other teams/groups.  
20. Team members understand what other teams/groups do, and their value to organization.  
21. Communication between our Team and other teams/groups is open and participative.  
22. Our team has established collaborative relationships with the other teams/groups in the organization.  
23. Other teams/groups recognize our achievements and see us as being effective.  
24. Other teams/groups understand the value we bring to the entire organization.
# Team Emotional Intelligence Scoring Sheet

*Scoring the Survey on Team Emotional Intelligence requires only a hand-held calculator. This worksheet may be used to tabulate responses and to report results to the team members.*

**Step 1:** For each item on the survey, determine the *number of people* who responded in each of the six response categories. Tally them as shown in the example below.

**Step 2:** Convert the raw numbers into percentages by dividing the number in each cell by the total number of team members who responded, as shown in the following example.

**Step 3:** Also calculate the “percent favorable” score. This represents the respondents who circled either agree (5) or strongly agree (6), as shown below.

**Step 4:** Overall dimension scores - add up the total responses in each column (1-6). Convert the raw numbers into percentages by dividing the number from each column by the total number of responses for all questions. Also calculate the “percent favorable” score. This represents the percentage of responses that were either “agree” (5), or “strongly agree” (6). This overall dimension score can then be placed in the “Overall Dimension Score” box at the end of the scoring sheet.

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| Team Management | | | | | | | | | | | | |
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| 12. Roles and responsibilities are clarified and agreed to by team members | | | | | | | | | | | | |
| Total # of responses | | | | | | | | | | | | |
| % of responses | | | | | | | | | | | | |
### Survey on Team Emotional Intelligence Scoring Sheet:

#### Organizational Awareness

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<tr>
<td>13. Team members understand how their efforts help achieve the goals of the organization.</td>
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<td>16. The Team understands the needs of internal and external “customers”</td>
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#### Organizational Management

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<tr>
<th>Question</th>
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<th>5</th>
<th>6</th>
<th>% Favorable</th>
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<tbody>
<tr>
<td>19. The Team effectively coordinates its work with work performed by other teams/groups.</td>
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<td>20. Team members understand what other teams/groups do, and their value to the organization.</td>
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<td>21. Communication between our Team and other teams/groups is open and participative</td>
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<td>22. Our Team has established collaborative relationships with the other teams/groups in the organization</td>
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<td>23. Other teams/groups recognize our achievements and see us as being effective.</td>
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<td>24. Other teams/groups understand the value we bring to the entire organization</td>
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The CAPS Training Series
Effective Leadership Participant Guide
Page App-15
Overall Dimension Scores

<table>
<thead>
<tr>
<th>Team Emotional Intelligence Dimension</th>
<th>% Favorable</th>
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<tbody>
<tr>
<td>Team Awareness</td>
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<td>Team Management</td>
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<tr>
<td>Organizational Awareness</td>
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<tr>
<td>Organizational Management</td>
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</tbody>
</table>

Based on the results of this assessment, and what you know about your team, what stage of Team Development do you think your team is in?

1. Forming __________________
2. Storming ________________
3. Norming ________________
4. Performing ______________

The survey should start to give you an idea of what areas you need to focus on to create an emotionally intelligent team.