



YOUR TEAM SUCCESS PODCAST

If They Could Read Your Mind: Tools For Capturing Organizational Wisdom

Shannon Waller: Do you wish your team could read your mind? Do you think that they already should know what to do and how to do it? Stay tuned to learn about the value of getting stuff out of your head and into other people's simply by writing it down.

Hi, Shannon Waller here and welcome to Team Success. Something has come home to me even more than it has in the past, and I want to share with you. And it is the importance of getting stuff out of your head and into a document, into a template, into a brief so that other people can understand what your thinking is, they can add to it, they can riff off of it, they can use it as a source document. Just the absolute importance of getting your thinking down, I'm going to say on paper, but frankly that's probably going to be digital at this point, but it becomes the really good handoff in teamwork. If you think about teamwork as a Unique Ability Relay, which is how I now describe a lot of teamwork.

In a relay race there are two critical things, and I've never run relay, but some people have told me this and I've watched a few. Number one is, have the right person in the right position in the race. Number two is, don't drop the baton. Bad things happen. But what's the baton? What's the baton in teamwork? What is that tool? What is that instrument? What is that vehicle? What is that baton? What are we passing? Well, it better not just be words in a conversation is what has come absolutely home to me. It has to be written down. Now I'm kind of jumping to the conclusion of the podcast now when I say we have a phenomenal tool at Coach called The Impact Filter. And it's available for free, we'll include the link in the notes, but you can just probably look at Impact Filter Strategic Coach and Google it and find it. But it is such a useful tool for getting your thinking down, and you can use it to riff off of, as one of my fabulous team leaders did yesterday.

She goes, "Oh my gosh, I need to create a marketing brief." And she based it off The Impact Filter, but she used some different terminology and we talked about it, and it can grow and evolve, like it's the whole point. But she's used it now to explain two really important campaigns and initiatives that we're doing, and she starts off with the "why." I'm so thrilled with it, and I complimented her on this this morning, so shout out to Lynda, because it sets the context so everyone knows why this is a big deal.

And here's why it's so critical to write stuff down. First of all, when you write it down, your thinking gets clearer. You also figure out what you know versus what you don't know, and that means you can leave some stuff blank and enroll other people in helping you fill it in, so there's opportunities for other people to contribute. But then also it becomes, as I said, that source document for other people to base their individual activities and Unique Abilities off of that.

Here's the problem if it just happens in conversation. You might come in with, "Hey, I've got this really cool idea. I think we should do X." Might be a cool idea, but what you haven't said is why. What problem are you trying to solve? What opportunity are you trying to maximize? What are you trying to do? What inspired you? What's the "why"? And these days, and I



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actually really appreciate the recent generations for this, is they're not going to take action until they know why. And here's why you should respect that, because you won't either. All of us are motivated- It's like we're choosy about where we direct our energy, time, and attention. And if someone doesn't give us a good enough reason, we're not doing it just because you said so. That's not really how we're wired, and we don't have automatons working for us either. They're not machines. They're thinking, feeling humans.

So we need to be really articulate about why we're doing what we're doing, and in a conversation, that can get missed. And, by the way, as soon as you've done the meeting and this has been documented and studied, people walk away from a verbal meeting when things are not written down with completely different takeaways and completely different interpretations of what happened and what was important. And knowing what I know about people's profiles and how they come into meetings, I'm not surprised. I'm someone who looks for actions. I'm looking for what's going to be fun. I'm looking for the strategies. Other people are going to take away the plan or the timeline. Other people are going to take away how this is going to make the audience feel. We all have very, very, very different lenses through which we look at things, and only by having it on, I'm going to say a piece of paper, but only by having it written down, digitally or otherwise, not that it's static, but it's captured.

Now, it may seem like I'm stating the obvious, and to some extent perhaps I am, but having been with Coach now for 32 years—who knew?—and how many meetings, I swear to God, the first year, two, maybe more, most of our meetings were held with people who, from a Kolbe standpoint, were short Fact Finder, short Follow Thru, and long Quick Start. So we would have meetings every two weeks, and we'd brainstorm and we'd come up with these great ideas, and then we'd leave and we'd come back two weeks later and go, what did we say we were going to do again? Because nobody had written it down. This happened for a long time. Finally, we happened, wisely, to bring someone in who was a Fact Finder/Follow Thru and they started capturing stuff. They could say, "Oh, here's what you said last time." And we're like, "Oh, that's still a good idea." Or, "No, what were we thinking? That's a terrible idea." Whatever it was. But then we had some memory brought back to the deal.

So I've been part of experiences where it was so obvious in the moment we thought we would never forget and then we forgot, or something that seemed like a really good idea at the time, flash of inspiration, later in the light of day, hmm, not so groovy. So it is so key to have a structure. I'm going to call it a structure rather than... Document sounds a little formal. But you really want to have a way to capture all of your great thinking, and you want to answer certain questions in that document, in that brief, in that thing that you're writing down, in The Impact Filter, which is, why are we doing what we're doing? What are we talking about and why is it important?



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I love how we talk about the best results, so you paint the picture of what it's done and done really, really well. So that kind of sells you and the team intellectually. For The Impact Filter, it also has a place to tell stories. So there's the best result and the worst result, and I actually start with the worst result. And the first worst result is, if we do not take action, if we don't do anything and maintain the status quo, what is the cost? We won't grow. We won't fix this problem. We won't address this particular topic. Something will be left undone. Those are our common worst results. And you want to bring some emotion into this. By the way, it's like oh my gosh, three years from now we're going to look back and go, "Why the heck didn't we do this? We'll be super frustrated with ourselves." Like you feel it. This is emotional fuel in the tank.

Then the other part of the worst result that I like to do is, if we do do it and it does not go well. So if we don't nail it, if we don't bring the right "Whos," the right Unique Abilities into play, if we don't meet the timing, if we miss the mark, if we blow it, what does that look and feel like? What does that mean for us? So telling that story with the emotions, like "we're going to feel bad." We used to have a joking thing where "we'd all lose our jobs, go work at McDonald's, eat little french fries," etc., etc. We tailor it a bit more customized now.

And then we do the best result. So the best result is, if you pull this off, if you win, if you accomplish everything you want, you get the ideal outcome, what does that mean for you? What does that mean for your future? What does that mean for your client's future if they're involved? What does it mean for you as a company? What does it mean for you as a team? One of my clients did something really fun. The best result if they pulled off this pretty incredible result, a chair design firm, is that he would take them on a trip to Italy to look at the amazing buildings and architecture there, and that's exactly what happened. They did end up going. Super cool. Now, that's not everyone's best result, but just to plant the seed there, it's kind of fun. You can put some big wins in your best result.

And then the success criteria is, how do you accomplish that ideal outcome? How can you prevent the worst and ensure the best? That is key. You want to set the floor, and you want to get the ceiling, and how you get the best and prevent the worst is how I like to fill out The Impact Filter. And that's your success criteria, and that becomes a checklist. I am a huge fan of checklists because they share your brain. Get stuff out of your head, get it out of your team's head. When it's on paper you get to tap into what Babs calls collective intelligence. And when it's only in our minds, it only happens in a conversation, trust me, when you leave, it's like if you're blindfolded and put a bunch of people around an elephant and they felt the different parts of the elephant, you'd have a very different description of what that animal was. The same thing happens with our projects. We all have our own blindfolds. And so doing an Impact Filter, creating a marketing brief, having a template, creating a checklist.



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The checklist that the renovation company that's doing our house, they had on the wall... Much less of all the other stuff that they've just done, all the demo stuff in three days and it's pristine, it's very impressive. But the checklist, I took a picture of it. Like, this is incredible. I know what you're thinking and other people know what you're thinking, and it's pasted on the wall and you don't even have to be there. Like how cool is that? So I'm super excited about getting the checklist into Asana, getting the template into Asana. This is going to be one of the coordination tools to make for my last podcast about how to have much better teamwork between teams is to create templates. So if I'm asking you to do something, here's the checklist, or if you're getting something from me, you're like, "Oh, okay, this, this, and this. What about that?" Right? And if you've co-created the template, then you're going to ask really smart questions.

We've been using these checklists in Trello. Now, we're switching to Asana. So I'm excited because it means we can share our brains, we can add our input, things can happen consistently. And from a CliftonStrengths standpoint, consistency is I think in my bottom five. So it's not something that I bring to the table, but I sure as heck appreciate it when other people do. I want to know that that knowledge and wisdom is captured. Do not reinvent the wheel every time. It makes no sense. So how can you capture that knowledge and wisdom? We've been doing stuff for a while. If you're in Coach, Unique Method is such a fabulous tool. You start to document the steps, it's done in a clockwise fashion, 12 boxes in a horseshoe shape. And then in the boxes, what's the step, and then who's the "Who"? That word's been there for a long time, well before when we wrote the book. And then there's a little arrow to the next box. So what's the handoff, and add the timing in there. And that's a great graphic way of illustrating what has to happen.

So as you can tell, there are a ton of tools for this. Obviously, project management software is part of it, but even having that original, I'm calling it a source document, that shares the thinking. I'll often start one, but I would much prefer to collaborate on it. I want other people's input. I think that's key. So I create something that other people can contribute to and then it lives, and then other people can riff off of it. It's great, because I was talking to Lynda about another one that she did, and she goes, "It was great. Now Chris can go grab his stuff, Anna could grab her stuff. Tammy could come and take what she needed." And it gives that inspiration to people, and we're all literally on the same page.

So capture stuff, write it down, get it out of your head, get it out of other people's heads, put it into a form where other people can access it, and it just makes everyone smarter. And again, it means you don't have to be there all the time. It drives me crazy when you need these huge chains of approval, and you have to go up all of these levels. It's like, that is so bureaucratic. And if you want to distribute knowledge and get it out to your team, this is how to do it. And we take for granted how much we know. We take for granted, we think that other people think the way that we do and that they've had our experiences and that they've made our mistakes.



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They clearly have not. And so they know what to do or what not to do. Mm-mm, mm-mm <No, no>.

So think about your thinking, capture it. Start with an Impact Filter. You may innovate another completely different document, please don't steal ours, that captures some of the key information that you want to use. But do that. Take the time, make the effort to capture that thinking in a permanent form because it is gold. And in fact, we had a client one time and we told him we had at that point 500 documented Unique Methods of how we do things and how we produce our workshops before Zoom workshops and lockdown and such. And he said, "Wow, you've just doubled, if not tripled the valuation of your company." He said, "Most wisdom for a company walks out the door at five or six o'clock and doesn't come back in till the next morning." He said, "The fact that you have written down how you do things means that your company, again, is worth two to three times more." I was like, "Cool." Not that we're planning on selling, but it's great to know that our company becomes more valuable, and it becomes more valuable for the people in it, much less anyone else.

So if you've been putting that off, if you're not someone who naturally writes stuff down, just do it in collaboration. It's way easier. Someone will be a good scribe, trust me. And it's fun. It's fun to capture everyone's input. And then there are other people, Kolbe Follow Thrus, who naturally like to document things for the most part, as long as it's something they're interested in. So take advantage of the talent that you have. There's some people that are actually wondering how the heck you manage to do what you do with nothing written down, and they would really appreciate that. There are natural list makers in the world, so please take advantage.

All right. So get stuff out of your head, get other people involved, value what it is that you do. Break it down into the smaller pieces, create those checklists. Read The Checklist Manifesto by Atul Gawande. G A W A N D E. The Checklist Manifesto. Brilliant, brilliant book, and it will sell you on why checklists are really important for people like doctors and pilots. So it should be important for us too. And have fun. Have fun capturing all the wisdom, all of the how-tos for your company so that the "Whos" can know how to do things. This is really what we're talking about.

All right. Thank you so much for listening. I hope you're inspired. I hope you have some wrinkles you'd like to iron out that this process will solve for you. And really it's all in the spirit of having just phenomenal, fabulous, fast, effective teamwork. So thank you so much for listening. If you have any questions or comments, please let me know at questions@strategiccoach.com. And as always, here's to your team's success.