A LEADER'S GUIDE TO

Getting More, Fresh, High Quality Ideas from Their Teams

RIGHT NOW

A wake-up call to any leader that needs to innovate to thrive

By: Lynda McNutt Foster and Richard Hammer

Cortex Leadership Consulting

Why teams aren't better at creative problem solving

Issue: Team returning to our offices.
What if they don't feel safe coming back in, someone says in the meeting.
Ok, why don't we ask employees what they think.
No, we don't have time for that.
Sure we do.
Yeah, right, like we have time to talk to every employee right now?
No, we don't have to time talk to every person.
Maybe we could use our text system or google forms or something to take a sort of pulse survey on what they're thinking right now.

What? No. That would take too much time. We've never done that.
Let's just stick to the plan we have.

No.
Yes, but.
There's no time for that.
You need to understand how things work around here.

BAM! Death of an idea in less than 30 seconds in a team meeting. Maybe it was a bad one. Maybe it wouldn't have worked, and who knows if there was a better one that could quickly be built on from that one.

These words and phrases seemed to quickly shut down exactly what 94% of senior leaders say they want more of – fresh, new ideas to solve the biggest issues that their organizations are facing, especially during a crisis and transition of the type all organizations are going through right now. To survive and eventually thrive in the business climate we have now entered requires skills in seeking different, fresh, perspectives.

70% of senior executives said that innovation was going to be the main driver of innovation in their companies, yet only 65% of them were "somewhat", "a little", or "not at all" confident about the decisions they make in that area, According to the McKinsey & Company report Leadership and Innovation in 2008. The report went on to say:

The structures and processes that many leaders reflexively use to encourage innovation are important, we find, but not sufficient. On the contrary, senior executives almost unanimously—94 percent—say that people and corporate culture are the most important drivers of innovation.

There are 4 main conclusions that were apparent from the research which Cortex conducted that collected and analyzed more than 100,000 pieces of data over more than 5 years with senior leaders, managers and supervisors and their teams. These conclusions were:

> Micro interactions and conversations are the key factors in creating a high-trust working environment that leads to team members being willing to co-create and share their new ideas and have others experiment with them.

> A high emphasis on organizational values, mission, or goals do not create engagement unless the senior leadership team, along with their managers on the frontlines, are held accountable to practicing them.

> The ability of senior leaders and their managers to remain curious by actively seeking different perspectives from all levels of the organization is a key factor in the volume and quality of idea generation.

> Specific types of team training, coaching, reinforcement, and individual support that is designed to build trust and accountability in adhering to the new behaviors, can make almost any team capable of generating more and higher-quality ideas.

The research conducted used the following methods:

- ❯ Observing teams in their actual meetings.

- ❯ Tracking, through multiple quick touch points each week, the progress that leaders and their teams were or were not making in using any new behaviors they had committed to making.

- ❯ Mapping and measuring patterns of communication that could be the drivers that created their current culture.

- ❯ Assessments that measured their behavioral preferences, motivators, and strengths when working on a team.

The most telling research discovered was in one number, 58.

Idea avoidance.
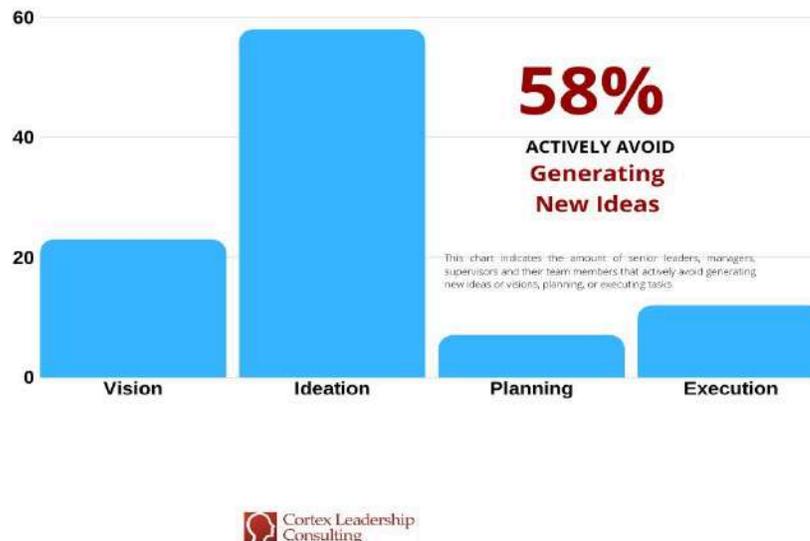
58% of leaders and team members actively avoided the generating of ideas and those people with a strength in ideation were often avoided as well. This avoidance of the brainstorming of new ways and perspectives of looking at problems lead to a stagnation of forward progress necessary for maintaining a competitive advantage.

Sometimes the people on teams in the study that did have new ideas were ostracized by their fellow team members. This avoidance to the generation of new ideas and of the ideators themselves isn't recognized by some leaders. When this type of culture persists on a team or becomes the corporate culture, innovation becomes almost non-existent except at smaller tactical levels. In some cases, when an executive leader or even a manager with authority is strong in idea generation, there seems to become a learned helplessness type of response by team members. It appears that the team expects their leader to generate the ideas and they believe their job is to plan what they are told to execute.

The 4 Strength Zones in Generating and Executing New Ideas

The assessments taken by participants were a measurement of the 4 strength zones for executives, managers and supervisors when working on a team initiative or project. These strength zones were:

Visionaries: people who are fully engaged when they are looking far into the future when given a "blank sheet of paper" to come up with a vision of the future for their division or organization.
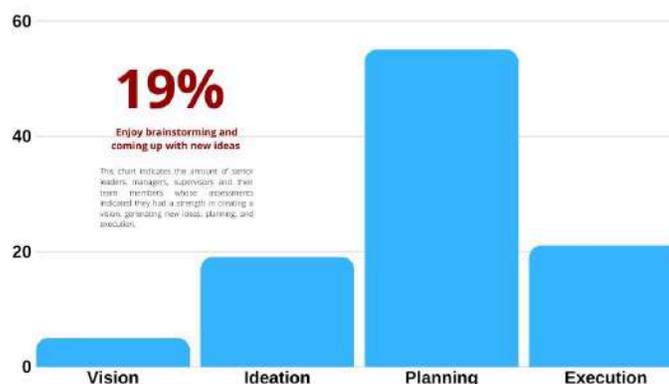
Ideators: people who enjoy brainstorming new concepts or methods for doing things differently than the status quo – these people come up with new ideas all the time and get excited about new possibilities

Planners: like to consider what is feasible. They quickly eliminate ideas they do not find as feasible to execute – they love to come up with the plans for the vision that others have created.

Executors: like to get things done. They complete projects, run across the finish line as they work in an urgent and important mindset. They want to check tasks off "the list".

The chart to the left indicates that in a wide variety of organizations planning is the area people feel the safest and most competent in at work. It shows that Ideators are outnumbered five to one.

Planning occurs when ideas are sorted to determine their feasibility to reach the vision stated. **Without a clear vision to point towards and enough ideas to compare against one another, teams get stuck in spending valuable time planning the execution of a single idea.** When that idea fails to produce the desired results, the entire process starts over again.

19%

Enjoy brainstorming and coming up with new ideas

This chart indicates the amount of senior leaders, managers, supervisors and their team members whose assessments indicated they had a strength in creating a vision, generating new ideas, planning, and execution.

Cortex Leadership Consulting

When teams were trained in a method in which their concerns were heard around the problem that needed to be addressed, at the beginning of the meeting, they seemed to feel more comfortable discussing the possible ideas. They were better at setting a desired outcome before they started idea generation. When concerns were heard and felt they were understood at the beginning of a process and throughout it, the team members were highly engaged in the process. Their ability to create a sufficient volume and quality of ideas increased.

These are guidelines that help teams become better at creative problem solving that leads to innovation:

1. Spend an equal amount of time and energy at many levels of the organization to create a vision or desired outcome.

2. Use active listening skills to note concerns from team members without feedback, simply letting them feel heard and understood.

3. Actively and consistently encourage new, fresh ideas from anyone that can generate them regardless of their tenure on the team or in the organization or role they currently hold.

4. Use those whose strengths are in the planning phase to determine the most feasible ideas for reaching the aspirational vision or desired outcome that has been agreed and committed to achieving.

5. Allow the people who were tasked with executing the ideas/experiments to come back to their teams with issue feedback on what results they were seeing and ways to improve them.

The more time that a team was observed planning before the creation of a clear and aspirational vision and gaining buy-in from key team members that were going to be needed to execute it, the more they seemed to demonstrate innovation constipation. Leaders who did not appear to make an intentional effort to use active listening skills with those on the frontlines that were going to be needed to execute the new plans, the more it was witnessed that the plans when executed didn't generate the results they planned for.

4 Main Factors Why Ideas Die in Meetings

1   **New Ideas Can be Seen as Threats**

Perhaps you've heard yourself or another leader say in a meeting:

"We need some new ideas!" the leader of the team announces. I mean we really need them. You're working, doing the job everyday guys, and we're not making progress like we need to. Our customers are changing, the dynamics are changing, yet, we're stuck. What do you think we could try? Anyone got anything for me?"

Crickets.

This sound of silence is heard by many leaders and is the leading factor for them reaching out for assistance in problem solving. The leaders who are seeking fresh, new ideas to help solve issues in their department, division, or organization are plagued with silence from team members they thought should be able to help them. Leaders can see that some type of change has to happen to grow or survive, yet every time they ask for ideas none of their team members speak up.

From the research, after meetings, team members thought that coming up with new ideas wasn't their job. Other times they thought they had good ideas, but felt that they weren't being listened to or their ideas even considered. This was especially true from young professionals' point of view on the teams.

Most meetings include little, if any significant time or focus on the generation of ideas. The studies found that there was a culture that supported the preponderance of the "blame game" in many teams and throughout the organization. The research indicated that an obstructionist type of behavior occurred frequently and seemed to be rewarded.

Obstructing new ideas before they are fully formed can be a way for leaders to justify their own methods of operating within the organizational system. Many see new ideas and methods of doing things as threats to their experience and expertise and subsequently to their worth.

The consistent behavior we observed with organizations that had innovation constipation was they played the BLAME GAME.

2 The blame game syndrome

The blame game was pervasive. It sounded in meetings like, "I wasn't really behind that idea when they came up with it," Or "Who's idea was that anyway?" Or "We should have never tried that – it was a stupid idea in the first place."

You can easily measure the level of avoidance of being the one who gets blamed in these types of cultures by how many people are CC'd on every e-mail that goes out. What that sounds like when asked about the waste of time it was to copy so many people on every email, is: "I don't want to get blamed for not having told so and so about it." Or "I don't want to have that come back on me."

When small, sometimes only one sentence, micro conversations were mapped during team meetings, we identified certain team members' behaviors that were labeled as "obstructionists." If people in authority consciously or unconsciously obstructed new ideas from forming, these individuals could stop the generation of ideas dead in their tracks.

3 Yeah, but

"What if we tried…" someone in a meeting said, after hearing about a problem that has arisen in their department. "Yes, BUT we tried that a few years ago and it didn't work," comes from an individual who has been at the company for years. "But, the person with the idea says, you haven't tried this, and I think it could work!" "Buuuuttt, you don't really know enough about our industry to know whether it will work or not".

And so it goes. Yeah, BUT. The indicator from people in meetings to say, "Yes, I heard you, BUT my thought is more important than what you just said." The obstruction that occurs in these micro moments of BUT and kill the will and engagement of the other team members and those that might be listening. It's a signal to everyone in the room that says, **you better be ready to not only defend every idea you bring up in a meeting, but also substantiate its ability to work before you dare speak up.**

What tends to happen in meetings is that the highest authority in the room has the final say on which ideas move forward and which ones don't. What also happens is that a meeting to generate ideas occurs without an authority in the room to guide it and so when any ideas are presented, they are quickly thrown out without explanation to the people or team that created them. Many times, it was observed that strengths of those whose strength was in planning and execution push an idea before it has had a chance to be built on. This results in not enough ideas for the planners to consider.

ust as destructive to the process, are people strong in the desire to generate new ideas who cannot stop generating ideas during sessions marked specifically for planning. Ideators became obstructionists themselves when they haven't been trained to channel their ideas into a conversation and invite co-creation. When idea people got in the room with people of authority, they are not found credible when they have not done their research on the industry, the background of the people in the room with them, and quick fire a set of ideas before people can process them.

Whoever the obstructionists are in a meeting they may not be consciously aware that they are putting up obstacles. Team members simply describe themselves as "practical" or "experienced" or "had another good idea" or "need to get to work" or "already sees where things need to go – what are we wasting time on generating new ideas – we've got the vision".
.

Assess Your Ideation Tolerance

As a leader, ask yourself these questions to determine the ideation tolerance level in your organization:

- How many new ideas to solve your toughest challenges have each of your leaders considered from their team members in the last month, 3 months, 6 months?

- Do the consultants you use work directly with senior leaders and their teams to generate new ideas?

- If polled, what percentage of meetings would people in your organization think are a waste of their time?

- Measure your failure tolerance by finding out how many experiments do you actively support in a year and how many have failed?

- Do you budget for and provide the resources of time and support for experimentation?

The good news is that when the proper training, coaching, and reinforcement is applied, the teams that demonstrated an avoidance of ideation were able to start making a shift that was measurable.

The Key Factor is a Culture of Continuous Improvement

Teams that are trained, coached, and new behaviors supported and reinforced become successful at ideation that leads to innovative problem solving. The teams that a core value of continuous improvement and accountability begin to thrive. They begin seeking feedback and are willing to make fundamental changes to their daily practices. The leaders and all team members became accountable to one another which quickly built trust in the areas of reliability, competency, standards, and involvement. Leaders and managers started to work in unison to set an example of what right looks like by beginning or continuing to demonstrate a high level of responsibility for experimenting with new ideas. They also held themselves accountable for getting results – not for whether a particular idea succeeded or failed.

Start with a Clear Vision of What Right Will Look Like

Teams that have a clear vision of what right will look like (their why, so to speak) are more likely to succeed in their innovative initiatives. Simon Sinek wrote one of the most viewed TED Talks with a total of more than 28M views and a book he wrote on the topic, Start with Why. According to Simon, "People like Martin Luther King Jr., Steve Jobs, and the Wright Brothers had little in common, but they all started with Why. They realized that people won't truly buy into a product, service, movement, or idea until they understand the why behind it." Simon was able to capture the world's attention with his concept and message. The assessment tools and conversational mapping used in the studies we conducted were designed to measure leader's strength and skillsets in developing and communicating a vision others would become engaged with. The vision or desired outcome needs to be clear for each project or initiative as it allows the team to understand how everything they do fits into the bigger organizational vision and mission.

One finding that can bring hope to leaders, their teams, and organizations is that no matter which skill team members started with, whether it be Vision, Ideation, Planning, or Execution, they could be trained to build another on other ones. Observations also indicated that when leaders and team members form thinking pairs and small groups, wherein each member of a team determines their own strength zones, appreciates and trusts the skills and ability to contribute from others, solving problems happens exponentially faster.

3 Ways to Cultivate Ideation in Team Meetings

The good news is that simple behavioral changes can make a big difference when it comes to cultivating ideation. When the leaders of an organization of any size consider these, the environment becomes ripe for ideation and the engagement of team members rises.

Ways to support ideation:

1. Praise the effort, not the outcome. From the research by Angela Duckworth that she released in her book, [Grit, The Power of Passion and Perseverance](#), the most important factor in success is "grit". Praising the effort that was made keeps ideas flowing.

2. STOP using "BUT" and start saying "AND" during meetings of any kind. What that sounds like is, "Right, I get that you are seeing it that way, and my perspective is" or "Okay, that's an idea, and are there any others right now" Build on each other's comments rather than immediately shutting them down with "yeah, but" language.

3. Ask for ideas for the toughest problems you are facing, not just the smaller tactical items. Ideators and highly engaged teams love to solve big problems and work on things that they feel will have an impact – especially young professionals on your teams! The brightest ones are exactly the ones you want to bring to the table for ideation as they have a fresh view and no experience that an idea won't work because it hasn't in the past.

Example of what right looks like: One very traditional organization that was studied, hired a CEO whose highest assessed scores were in the strengths of Vision and Ideation. The leader pushed through initiatives while some of his executive leadership team members were actively obstructing forward progress. They thought everything was working just fine the way it was, why change? Why was it necessary, many of them thought, to move so quickly? His grit and persistence to keep the "ball rollin'" and his vision for 5 years down the road was unwelcome by some on the leadership team and perhaps even some members of his board. The CEO was in a position of the highest authority, though, which gave him a strategic advantage and allowed him to move quickly towards his vision. His tone wasn't always appreciated, and it rarely is in the type of situation and with the type of team he had inherited. He was open to new and fresh ideas, humble and also highly engaged in the leadership training his team went through. His grit has resulted in a strategic positioning many in his industry would admire right now during a crisis.

A Leader's To Do List

Foundational changes by leadership teams can quickly increase the likelihood their organization, divisions or team's ability to innovate through their existing and future challenges. When leaders commit to following certain practices, a culture of inclusion began to be created for all team members. The results trigger their best thinking and reward the organizations they serve with higher profits and lower expenses.

Leadership behaviors to change:

- Replace the "blame game" with assuming good intentions from all team members.

- Believe in team member's ability to execute greatness in their role. When you no longer believe that, do what you can to help the team member transition to a role they could thrive in.

- Schedule time, at all levels of the organization, for interactive dialog about systems and processes to build trust in the areas of sincerity, involvement, and reliability.

- Hold yourself, your leadership teams, managers and supervisors accountable for supporting and cultivating new ideas and experimenting with them.

- Work alongside your teams to create a set of rules of inclusion and facilitate meetings holding yourself and all attendees accountable to follow them.

- Lead the way in using new technologies the way other team members are – have a young professional on one of your teams teach you how to use them.

- Use video for conveying messages on matters that have been decided so that team members can hear your tone and see your body language.

Modifications to Team Meetings:

> Use shared drive software instead of meetings for report outs.

> In-person team meetings should only occur when you need team member's input to progress.

> Build trust by starting and stopping meeting on time and following agendas.

> Use timed rounding by stating something at the beginning of the meeting like "We have about 10 minutes, could each person share _____ for about a minute".

> Only label meetings as "interactive" if every team member attending could provide input.

> Make meetings smaller by having them contain 10 people or less to ensure that there is time for each member to share their point of view during the session.

> Schedule each meeting for a specific purpose like "planning" or "ideation" or "vision" or "execution".

The most important part of getting teams to think at their highest level is to remember that you cannot separate the human being from what they do at work. People have experiences, those experiences drive what beliefs they form that lead to what actions they take. Changing the way people treat each other in meetings isn't just the right thing to do from an organizational values point of view, it also results in sustainable profits and a competitive advantage.

Addendums to this study will include:

1. An Idea Generation one-sheet you can use to start generating ideas with your teams right now.

2. An example of rules of inclusion that can be used by any team.

3. Instructions for a Team On! exercise that teams can use to creatively problem solve.

4. An explanation of the what, why, who, when and how of the these studies

An Explanation of the What, Why, Who, When and How of the Studies

Over the last 5 years, Cortex Leadership has studied the way leaders and their teams solve problems. We studied a wide variety of organizations and industries, and among diverse styles of leadership teams for generating ideas. The studies and work we did range from a multi-location truck dealer to senior living, from international engineering firms to smaller, local ones. Our work included working with leaders in the processing and distribution of scrap and other metals along with, credit unions, city municipalities and other government institutions, and manufacturers small and large. In doing so, we collected over 100,000 pieces of data, from more than 10,000 executive leaders, their managers, supervisors and their teams.

As the CEO of Cortex Leadership Consulting, I am a small business owner. Cortex isn't my first profitable endeavor, I opened my first company at 20 and sold it 10 years later to an international one. My background and experience ranges from pest control in that first company to advertising and marketing in subsequent ones and roles with television and radio stations. I started in coaching and consulting leaders because the ones I was selling advertising to asked me to during the 2008-2009 recession. They seemed to trust my advice because it worked to help them grow their companies. In order for me to trust the advice I was giving them I felt compelled to be constantly updating my understanding of their businesses, industries, employees, systems of operation, and proven methods for behavioral change.
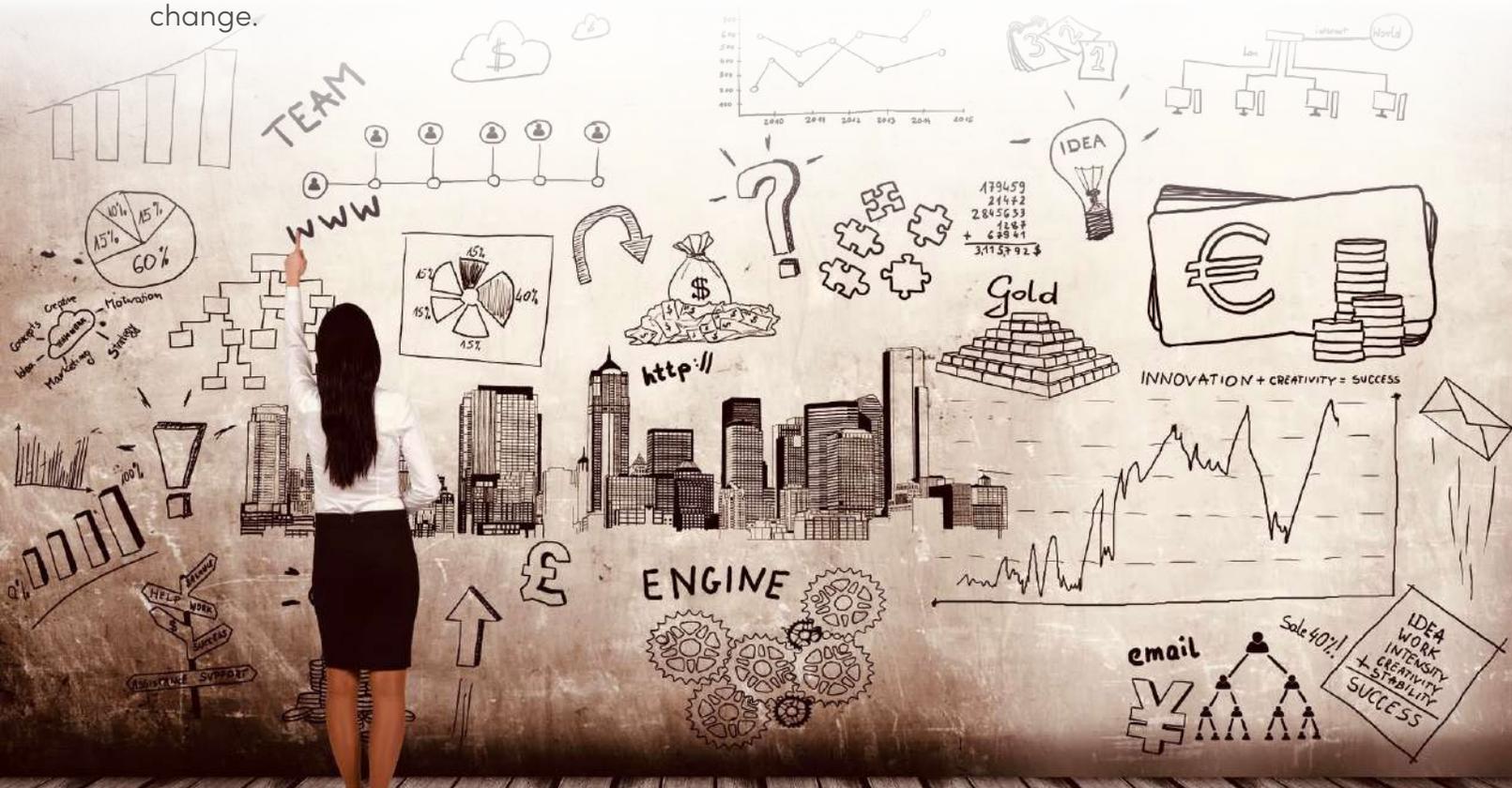
The studies we've been doing with leaders and their teams weren't from an academic standpoint. It was from a business standpoint, rooted in wanting the people and businesses we serve to be successful. If we don't contribute to leaders getting results, we don't stay in business. If we don't learn what is working and what is not, we can't continuously improve and update our systems of operation. We had to do the work we are reporting to you about because if we hadn't, we ourselves wouldn't have made profits and remained relevant in our marketplace.

As a smaller firm ourselves, we did our best to use care and integrity in what we collected and to keep all information we received anonymous in what we report to you. For those reasons it's important to note:

> The purpose of collecting this data was originally embarked on to create a vehicle for continued improvement in our deliverables to clients.

> The volume of data coupled with the trackable application of the findings has allowed us to see meaningful patterns that at times, we did not expect.

> This is not a peer reviewed academic, scientifically validated set of findings and conclusions, although it is one that has much more data and hands on approach than any research in this area we have studied that has come before it.

> The hope is that the release of these findings, now, during this crisis time and downturn in the world economy can help bring to light the real-world application of some principles and practices that organizations can use to make them more competitive.

The quest we've been on was aided and accelerated greatly by the insights and contributions of Richard Hammer, a brilliant creative problem-solver and technology whisperer. His experience in being an enterprise architect gave our work the advantage of having a world-class team builder and successful entrepreneur to learn from and with. He was also able to overcome with us any hurdle in the creation of digital tools that gave us the ability to track and collect data and analyze it immediately for the purpose of using it to improve the results the teams we were working with were getting.

Throughout the last five years we had some theories going into the study that were completely disproved and others substantiated. One that was disproved was that people who were willing to change behaviors showed up to a leadership class highly engaged from the first day. To our surprise, some of the leaders that had the biggest behavioral changes in the way they treated other team members occurred from those that seemed to come to our work kicking and screaming. A theory that we were able to prove and substantiate were finding that were published in Change for Good, A Revolutionary Six-Stage Program for Overcoming Bad Habits and Moving Your Life Positively Forward, which is required reading for many coaching programs. That 20 year study concluded that adult behavior change was aided the most by helping relationships. I wondered, after learning that, how leaders could be helped consistently, and in a personalized way through the behavior changes we were training and coaching them through in a servant leadership model?

Answering that question turned in a long process that resulted in developing our own software and utilizing it to do constant experimentation. The system we built sent out interactive questions to leaders via their text messaging on their smartphones. When we started out and built the software we call goMonti® there were no tools we could find for our specific purposes and it turned out that one of the biggest hurdles was that most adults didn't even know what a **keyword** was.

The reason that goMonti became such an important part of our studies was that it was the first time any researcher focusing on leaders and their teams, that we were aware of, tracked what leaders were thinking, in real time, three times a week through quick sort of pulse surveys.

We used questions to see how leaders were applying what they were learning. We tracked if their vocabulary to describe their problems at work was changing as they learned. We prompted them with questions to remind them to ask more questions to their teams. On Fridays, a common question to the leaders was, "What went right this week for you or your team?" Many leaders went from not answering that type of question and when asked in class why they didn't saying, "I couldn't think of anything at that moment?". By Monti responding to them automatically to their answers in a helpful, supportive, and encouraging way many leaders began to rely on the system for reinforcement of the behaviors they longed to see in themselves. Our proprietary system also allowed me to group different types of questions to groups and all answers came back to only our software system, never to a group of people. When received I would review them (sometimes up to 250 a day) and respond individually to those that I found interesting, wanted more learn more about, or to let them know, "I am listening. I hear you or you matter."

This consistent system of support to leaders in their behavior change turned out to be much more unique then I ever thought it would be. When we had it built, my thought was that every keynote speaker, coach or trainer would immediately adopt a system like it. Afterall, wasn't it a perfect way to finally know if what you were coaching, teaching, training, or lecturing about was being utilized by your audiences? Would everyone want to know if the effort that they were putting into getting leaders to change was working, but more importantly, why was it working, and most important, if it behaviors weren't changing wouldn't you want to change your methods of delivery quickly? Didn't every consultant or coach want that level of accountability to their client if they could?

Nope. I was wrong. One keynote speaker, when I excitedly told him about the system said, "I'm not paid for the results they get from what I teach them." There were some evangelists like Raphael Louis Viton, though. Raphael is a talented and very successful innovation leadership coach with **Axialent**, and author of **Free the Idea Monkey**. He understood what we were trying to do immediately and worked to let other coaches and clients know the new and innovative way they could track the progress of the leaders through behavior change. He tried. He believed. He was only able to get beta testing done in a few cases. Raphael spent hours with me on the phone, discussing methods we were both using, comparing notes, and he was and is very encouraging and, makes me laugh out loud.

A T-shirt he is famous for wearing is black with bold white letters that says, "Make More Mistakes". He's taught me a lot.

So, for the better part of the last 5 years I have been Monti. I work with Mark on our team that programs the system for me, runs reports, and helps me watch the steady stream of incoming messages. We have witnessed transformations happen through the text messages being responded to by leaders. I remember one in particular. The leader started the coaching/training "kicking and screaming."

He didn't want to change. People were idiots, he was sure of it, and not worth the bother. As time passed, and he showed up and learned more, his tone began to soften and his insights began to change his reactions to those on his team that used to annoy him. He began joking with Monti and sharing when he was struggling. Monti became, for him, a person he could trust to listen and be vulnerable with. Monti was his stepping stone and supportive mentor he needs to have during his change process.

I'm not sure my husband Allen has ever really seen the true value of Monti as he is an introvert that doesn't use text messages very often to communicate. When the system needed a complete and total overall, though, to be able to create more sophisticated interactions he pulled out his personal checkbook and wrote a $20,000 amount to the developer we worked with. He did what I couldn't find within myself to do then. He believed in me at that moment more than I believed in myself. He became my Monti. To note, Monti has never sent anyone $20,000.

This interactive way of support through our goMonti system of quick communication points (micro-conversations) became a leader's coach in their pocket and was our vehicle for comparing what someone said in class, versus what they actually thought and did when they were in their workplace. We were able to compare their DISC scores and see if what the assessments were saying were their motivators, came through in their responses to leadership level questions. When it came to their strengths in vision, ideation, planning or execution that we have chosen to focus on in this particular report, Monti tracked the results of problems they were facing and had to solve to survive another day.

In the last year, Monti has been used to create team engagement pulse surveys that we can collect one day and report out on the next. No delay in data collection or in getting the leaders to be able to quickly pivot leaders behaviors that are effecting their teams the most.

By utilizing assessments, coaching sessions, observations in team training classes, the main factors that obstruct idea generation on leadership teams began to become clear. Experimenting with willing participants occurred with over 50 teams in order to try different methods designed to increase the volume and quality of fresh ideas that grew into results that could be experimented with. The thesis that was applied from the start was that certain principles and practices that increased idea generation and experimentation, along with applying accountability best practices, could recession proof the companies that had committed to and were using them.

At time of this report, our team at Cortex feels a great deal of pride and appreciation for the companies that allowed us the privilege to study their teams, existing methods, and have been willing to experiment with new processes. For most of those we worked with, the reports to us are that the hard work they did to create cultures for ideation and innovation in their companies are paying off. We are grateful to them for their support and encouragement as we conducted this research and were allowed to do with their teams to continually improve the work we do with their leaders and teams.

Our team is also grateful for those individuals that helped us with the studies and collection and sorting of data. Mark Quiroz assisted greatly with the programming and collection of data in our goMonti proprietary software and Thomas Kappler was able to quickly pull data and create reports, graphs, and pie charts we could use to understand snap shots of what was happening at that moment and trends that were occurring on teams we studied and worked with.

As important was the constant support and encouragement by Samantha Steidle throughout the research project, but who also freely and generously lent her expertise to us in assisting us to format and wordsmith this report of findings.

In addition, there has been a group of individuals that for the last 5 years have contributed to the continuous improvement of the findings we were receiving back from the studies. Kimberly Eakin is known now as our Cortex historian and helps us remember the origin of all the principles and practices that were tested and developed as a result of the constantly updated findings. Simone Knowles is a discerning, loyal, helpful professional which we recognize as being foundational to the birth and sustainability of the work being done to help leaders and their teams. Her feedback has been invaluable to apply real world scenarios to test all theories that were being developed.

These and so many other alumni of our Cortex programs have consistently shown a dedication to working hard towards the aspiration of leading winning teams with a servant leadership mindset. Bless each one of them. Finally, Allen Foster, who my husband and business partner. He has always found the strength and grit when I couldn't for the last 20 years. Any credit for what we have been able to do in our work goes then, to him, and the God of my understanding.

Team On!

The purpose of this exercise is to utilize the principles and practices consistent with what you are learning to develop habits for conducting and participating in more effective meetings with your team and others.

The following is a step-by-step guide for facilitating a meeting for the purpose of creative problem solving.

Step One:

Choose who will execute the roles of:

Facilitator – leads the team through each phase of Team On exercise. The facilitator commits to listen and ask questions to bring out others highest level thinking.   They are to lead with curiosity as to be an example to the team. The facilitator does not have to be the highest authority in the room. They should be fully supported by the highest authority, however.

Scribe – takes notes for group, on a white board or virtual one that is visible to all team members. The facilitator is usually the Scribe. The reasons for this are several. The facilitator can use the scribing method to help team members feel heard and understood. The process also encourages the facilitator to stay in a place of curiosity that will allow them to look for information, not confirmation. When team members see the person leading creating the outcomes from their input, they feel more safe to share, as long as the facilitator is encouraging and supporting the comments they are fielding from team members.

Time Keeper – keeps track of the total amount of time allotted and makes the group aware of how much time is spent for each phase. They communicate directly with the facilitator. The time keeper should ask the facilitator how they would like to have the time kept and reported out on to them or the group as a whole.

Step Two:

Write Down Problem or Challenge Your Group Needs to Overcome

Write challenge on whiteboard

Step Three:

State Concerns In Connection with Challenge or Problem

This process should end with a minimum of 5 concerns and no more than 10 that connect directly to the objective. Concerns can be anything and should not be judged. Write each down starting with a line in front of the statement to leave room for later prioritization.

Example:
Challenge or Problem: Unproductive Meetings. Too much time spent in meetings that people feel are not a good use of their time.

Current Concerns: (stream of consciousness)
_____ If we don't have meetings how will we get information we need?
_____ Meetings at least keep people accountable for some deadlines
_____ I won't have a say in which meetings to get rid of
_____ No one knows how to conduct effective meetings
_____ If I'm not invited to a meeting I may get thrown under the bus and won't be there to defend myself

Step Three:

Determine What Right Will Look Like In One Year

Have group complete the following statements:
In one year, we will know we have solved the problem because we will:

DO.... What will the group be doing if the problem is solved? If it is based on the example of unproductive meetings, the statement may sound like: We will be having less meetings and the ones we do have will be highly productive as confirmed by employee surveys.

HAVE:... What will your team have if the problem or challenged is solved? Using the example of unproductive meetings it might be: We will have a structure for the way meetings are conducted and appropriate team members will be skilled in facilitating those meetings. We will also have more time to focus on strategies that lead to better decision making and have less unproductive conflicts.

FEEL... What will team members feel when the problem is solved? Using the above example you might state: We will feel empowered to work more effectively as a team and more comfortable and confident in our abilities.

Step Four:

RANK Concerns based on What Right Would Look Like a Year From Now

The group should use paper or other methods to privately vote on the top two concerns, that if solved first, would have the biggest impact on reaching what right would look like a year from now. The voting should take place privately and be revealed AT THE SAME TIME. This part of the process is critical. Members should not be affected by other member's votes.

Have someone on the team give the facilitator the results of the vote.
Vote until there is a concensus on which concern, if solved, would probably have the biggest impact on what right would look like in a year.

Example: The group may pick: No one knows how to conduct effective meetings.

Step Five:

What Right Will Look Like When The #1 Concern is Solved

Describe what right will look like when that concern is solved.
Using the same model as Step 3, what will the team Do, Have, and Feel if that top concern was solved.

Example: The people who are trained, will be facilitating the meetings.
We would have people who knew how to manage productive conflict during meetings. We would feel heard and understood during meetings.

Cortex Leadership Consulting

Step Six:

Brainstorm 5 Different Ways to Solve It

Have the group determine 5 different ways the concern can be solved. These should be 5 completely different ways to address the concern – NOT 5 ways to execute the same way.

Continuing with the same example the group may say things like:

_____ Get people trained on how to facilitate effective meetings
_____ Eliminate certain kinds of meetings all together
_____ Require rounding at every meeting
_____ Research how long, who attends, what are the outcomes of the meetings we are having right now so we can have accurate data.
_____ Get Elon Musk to conduct all of our meetings

Step Seven:

RANK Ways Based on What Right Would Look Like a Year From Now

The group should use paper or other methods to privately vote on the top two ways to solve the biggest concern the group had and, that if implemented would have the biggest impact on reaching what right would look like a year from now. The voting should take place privately and be revealed AT THE SAME TIME. This part of the process is critical. Members should not be affected by other member's votes.

Have someone on the team give the facilitator the results of the vote.
Vote until there is a concensus on the top way to move forward.

Example: The group may pick: Research how long, who attends, what are the outcomes of the meetings we are having right now so we can have accurate data.

Step Seven:

Set a SMALL Goal Your Team Can Easily Achieve

Set a small goal that will lead to achieving the way that you chose in Step 7. The goal should be VERY specific and time bound. The team members should all feel that it is relevant to solving the problem that you came to the meeting with. The team or team member who executes it, should be held accountable by making sure there is a way that is going to be measured to know that it is done as promised.

Example: Marsha will create a document in Google Drive where team members can insert the types of meetings each member is attending, how long they usually take (on average), what the objective of the meeting usually is (theme it), and whether the member thinks that the meeting was effective in meeting the objective, and whether the team member felt (on a scale from 1-7) whether the meeting was an effective use of their time.

Marsha would agree to have the document created by next Friday.

The team lead would review it, upon completion, and determine if it met the criteria that was set out in this goal.

The team would then vote, from 1-10 whether they were in agreement that this was a relevant first, small, step, to meeting the objective of this meeting as set out at the beginning of the meeting.

UPON COMPLETION OF FIRST SMALL STEP GOAL:

Once you have the first small step goal, set, you can determine if the 2nd way on the list needs to have forward momentum created for it. If so, you can create a first small step goal for that one as well.

You may determine that instead of working on a different way, you need take time to go back to the beginning and start again with your second biggest concern, that if solved, would lead to what right would look like a year from now.

Cortex Leadership Consulting

Things to keep in mind during this process:

It's extremely helpful to have a short meeting, before the meeting, with the highest authority, to determine what the objective is. The best way to accomplish this is to capture their concerns (at least 5), take them through Step 3 and 4 ONLY. Once you have their biggest concern determined, that will be the problem or challenge for the team to solve in their Team On meeting.

Visionaries need to have buy-in to what the problem or challenge is or you may have push back from them during the exercise. You can obtain this by checking in with them during Step 1. You could ask your visionaries, "Do you agree that solving this problem will lead to the type of long-term outcome we are trying to reach this year (this quarter, or this month – whatever is appropriate). If they say that they don't, you may ask them to participate in the session with an open mind and stay neutral until it is finished.

Ideators and Planners may experience conflict if a high level of trust and respect is not present. Ideators can experience frustration if Planners immediately question the ability of an idea to be feasible and could see them as "naysayers". On the other hand, Planners could see Ideators as always coming up with ideas that are unrealistic.

Executors may find the phased approach frustrating and could get so focused on getting the project finished and "marked off" their list that they could rush through several of the steps.

Foundational principles behind the Cortex Rules of Inclusion®

We keep in mind our desired outcome.

From Make Shift Happen/DDT vs TED/Growth vs Fixed Mindset: Begin with a vision or desired outcome. Set an intention and check in with any thoughts or opinions that need to be a part of that desired outcome so that they can have input. This practice develops the "why" for any activities and creates buy in from others.

From Time Mastery: 7 Simple Steps to Richer Outcomes – Step One is Focus on Your Richest Outcomes.

From Cortex Team Strengths®/VIPE: Strategic Thinking® – Begin with your desired outcome/vision.

We remove all distractions and sounds like cell phones from all view.

From the Cortex Coaching for Peak Performance® model – active listening requires that you be present and give your full attention.

Neuroscience teaches us that multitasking is a myth (you are simply switching back and forth with your full attention not on either thing) and that it takes twice as long to complete a task when you are trying to multiple things at one time.

6 Elements of Trust – being present, using active listening skills and providing your full attention to someone creates a feeling in others that you are sincere and care about the person who is talking.

Reactive vs Proactive mindset – applications on cell phones and the phones themselves can trigger our amygdala which is our reactive thinking part of our brain. Even seeing someone else's phone lowers our IQ by 10 points.

It's rude in a meeting to be on your devices when others are talking and then expect them to listen to you want you share your thoughts and opinions.

We use timed rounding at beginning and end of meeting to be sure all are heard.

4 Keys to More Effective Leadership – Problem Solving – when trying to solve difficult problems obtaining others perspective can be very helpful to discover your blind spots.

From the book Time to Think which explains in detail the importance of having everyone feel heard and understood in a meeting.

6 Elements of Trust – this practice builds trust in the area of involvement and sincerity.

Each person sticks to "I" statements.

This means that your opinions, thoughts, and experiences are from your point of view. Stating what you want to share by starting or ending with "from my perspective" helps open the dialog with others share their perspective.

DISC/Motivators/Cortex Team Strengths – You exhibit humility when you practice saying that what you think or are feeling is from your point of view. It leaves room for others to express their point of view and add value to conversation. Participants learn in DISC/Motivators/Cortex Team Strengths training that everyone has a unique point of view and that they can help us discover and cover for our natural blind spots.

We remain curious, especially when we do not agree with someone.

This is the main cornerstone to every module in Leading a Winning Team®, based on the principles of Servant Leadership that creates an inclusive and emotionally safe environment for all team members. Without an open mind and curiosity learning cannot occur. Curiosity is found in the pre-frontal cortex or the "CEO" of your mind. From higher level thinking to better problem solving, decision making, influencing others, to coaching others to peak performance, to giving and receiving feedback, you need to remain curious to truly listen for understanding and information rather than confirmation of your own thoughts and ideas.

When you begin learning how to coach yourself and others in Coaching for Peak Performance and the later course, Leadership Coaching Conversations I, you learn that without curiosity you will find it hard to connect with others.

We strive to appreciate others strengths and ability to contribute.

In each of the DISC/Motivators/Cortex Team Strengths modules you learn to pair your strengths with those of others on your team, other departments, and even vendors you may work with. Appreciation is the 4th A's step process of your development in the Acknowledge your differences, Accept that others could help you, Appreciate others strengths and abilities to contribute to a more effective, efficient, and collaborative desired outcome, and then take action.

Appreciate is an action work, whereas gratitude may be seen as personal acknowledgement. Appreciation leads to answering the one of five questions from Conversational Intelligence which is "Do I bring value?" By being specific about your appreciate it creates emotional safety with the other person because they know exactly how you appreciate them.

In addition, there are three types of feedback. Appreciation, coaching, and evaluation. The rule of thumb is that appreciation should be given at a 4:1 ratio versus evaluation. Appreciation is more than an email or expression of "thank you", but rather something like, "I appreciate how hard and long you worked on this project. I know the results may not have been what we were all hoping for, but your effort and grit really showed your strong and dependable character which will lead to better outcomes in our future."

We say it now, with kindness and respect, rather than waiting until later

This rule is designed to help people you work with learn to express their feelings and thoughts, even if they require courage to express. What it is NOT designed to do is create an atmosphere where others feel free to attack someone they disagree with.

Certain behavioral types may have no problem saying what they think now instead of later. Saying it now not later comes into play when all of the other rules of engagement have been followed. Remaining curious, appreciating others strengths and ability to contribute, timed rounding, and especially sticking to "I" statements will help you execute this rule well. Rather than saying it now, during a meeting, like "I don't agree with what you just said. It will never work." This rule is designed to assist you in saying that same thing like this, "From my experience and knowledge based I am unable to see how that new idea could work. Can you help me see your point of view?" Or perhaps during a session when there is conflict you could say to the other person you are disagreeing with something like "Help me understand your point of view. I don't see it and need your perspective to be sure that I do."

The person leading or in authority of the session honors agreed upon start and stop meeting times as do all participants

6 Elements of Trust – the number one complaint we hear that breaks down trust the fastest for a leader is to not be on Time, especially to a meeting they called themselves. Time is measurable, whereas other elements of trust could be more subjective in nature. Leaders need to nail this one to show they care about others time as much as their own.

We leave the meeting with clearly defined next steps for each participant.

Cortex Team Strengths/VIPE: Strategic Thinking – Execution. This rule helps to build trust and get important things done in every meeting when each person commits to a SMART goal and a system of accountability to be sure that things move forward and get done when promised. This leads to building trust in the areas of time, reliability, involvement, and sincerity which are key to connecting with others from our human beingness and doingness.

Cortex Ideation Generation Exercise

During a meeting when you need to get the ideas flowing or you or the team seemed to be stuck, take the presenting issue you need to find new solutions for and prose the following questions:

- Do we think this issue is worth solving?

- Do we need to solve this issue right now or is there another, more pressing issue that we could solve more quickly that could lead to a solution to this one?

- Do the people in the room trust one another enough to problem solve together?

- Are we getting people stuck by saying, "Yes, but" or "that won't work" or are we giving too short an amount of time to ideate about how to solve this issue?

- How much does solving this issue really matter to everyone in the room on a scale from 0–10? (measures engagement)

- If a 5 year old was trying to solve this issue, what would be the first thing they would think of?

- What's a completely stupid idea we could come up with to solve this problem?

- If we remove the how and when, and had unlimited resources, what might we guess could solve this problem?

- If we had no budget to solve this problem, who could we get to help us solve it?

- Has anyone else ever had this problem before and how did they solve it?

- Does what we are trying to solve resemble an issue that we have solved successfully before? What worked when solving that one?

- Could you increase or decrease the use of something?

- Is anyone with no experience and a completely different perspective in the room and what are their thoughts or ideas?

- Is there anything you can prune or get rid of that would solve the presenting issue?

- Have you given people time to think about the issue and come up with ideas before they came to the meeting?

- Are you making people in the meeting defend any idea they have instead of just listening and building off of it?

- Are you using a whiteboard of some kind to put the ideas on it so others can see them?

- Maybe you need to take a break and revisit it in an hour or tomorrow again?

Authors of Report

Lynda McNutt- Foster
Founder, CEO

Lynda McNutt Foster has been an innovator in business since 1987 when she opened her first company at only 20 years old.

Designing new processes that became industry standards in pest control, advertising, and now the coaching industry, Lynda is a sought after executive coach, strategist, and keynote speaker.

Lynda is the CEO and founder of Cortex Leadership Consulting and was named a Business Icon by Valley Business Front magazine. Lynda's work has been published on forbes.com and an expert executive coach commentator on WFXR news in Southwest Virginia. She is the founder of www.goMonti.com, an innovative coaching enhancement tool designed to increase retention and implementation of leadership practices.

Lynda is a Conversational Intelligence®
certified coach and trainer.

Lynda has conducted more than 3,000 executive coaching sessions and trained more than 10,000 professionals in the areas of communication, change management, time mastery, conversational intelligence, leadership coaching, facilitation, and executive presence. She has used the research she has gathered and analyzed from those sessions, trainings, and goMonti, to advise international coaching firms like Axialent, a firm Cortex partners with who work with clients like Amazon, Google, Proctor & Gamble, and Facebook.

Lynda is the author of two ebooks. Time Mastery: 7 Simple Steps to Richer Outcomes and 4 Keys to More Effective Leadership Behaviors.

Lynda is the mother of a daughter much smarter than she is, a husband much kinder, and she is the CEO of Cortex Leadership. She is a brain-focused trainer. Practical author. Slow runner. Day hiker. Enthusiastic zipliner. Pathetic speller and bowler.

Richard Hammer
Senior IT Consultant/
Data Analyst/
Enterprise Architect

Associate Vice President, Cloud Factory
1901 Group

In his current position with 1901 Group, Richard leads a 45 person team of experienced SMEs and researches and defines industry best practices and people, process and tools approach to implement an assembly line approach to software development and migration.

Richard has over 30 years of experience in consulting, data analytics, and management of technology teams. From directing $400K to $3M initiatives, to managing over $20M in VC/equity funding, Richard understands how to achieve success and what to do when you have it. One of his greatest successes was the transition he made from advertising and marketing to a new project resulted in moving the needle on children's' education throughout our country. Richard's work building Interactive Achievement allowed him to make a powerful impact and one he expects will continue with the PowerSchool organization, who recently acquired Interactive Achievement.

With experience as an enterprise architect with organizations like NASA, AOL, Discovery Channel, and Freddie Mac, and 1901 Group Richard has led teams that consistently delivered the right innovation at the right time.

Richard has a talent of transforming low performing IT teams with his ability to synergize the worlds of technology, business, and people.

Richard is an expert in SQL and other business analytic tools that allow him to find holes in data that others can't and presents them to clients in a language they can understand. Combining this with his "big picture" understanding of success, it is not surprising that Richard is highly regarded as a community technology leader.

www.cortexleadership.com

Cortex Leadership Consulting