

**THE BIG
QUIT
SURVIVAL
KIT**

M E R R Y L U E M A R T I N

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1

Pandemic: The Great Revealer

SURVIVAL TACTIC #1

PANDEMIC IMPACT QUESTIONNAIRE

Reflecting on the recent changes and new strategies will help build resilience going forward.

1. What has been the biggest challenge for your company to overcome since the pandemic?

2. What have you learned as a result?

3. If you had a crystal ball in 2020 and knew the pandemic was on the horizon, what would you as a people leader or business owner have done differently?

4. How has your team and organizational culture changed as a result?

5. Employees are asking to be treated as human beings. What does that mean for the people you are leading? What would they like you to continue doing, start doing, or stop doing as a result?

6. What positive outcomes has the pandemic brought to you as a person and to the company?
How are you a better leader as a result? How is the company stronger?

7. What are some of the innovations and new growth opportunities the pandemic has opened for you and the business?

8. What business trends as a result of the pandemic do you see continuing that will impact your business?

9. How are you planning to stay current and be ready to meet these trends?

10. What is the one accomplishment you are proudest of as you have come through the pandemic?
What will you do to ensure that accomplishment will continue in the future?

SURVIVAL TACTIC #2

TOP PERFORMER INVENTORY

The first step in retaining your top performers is to recognize who they are and how they are contributing to your team. Review the traits of top performers and note who on your team is displaying any or all of the traits and in what way.

Top performer traits

- Scope of their role is beyond their immediate job
- Goal oriented
- See change as a growth opportunity
- Culture stabilizers

TEAM MEMBER	TRAITS	OBSERVED ACTIONS/BEHAVIORS

SURVIVAL TACTIC #3

NAME IT AND CLAIM IT TEAM DISCUSSION

In addition to wanting to be treated like a human being, employees are expecting transparency and authenticity. Those are abstract words and need to be defined by the people asking for them. Hold a team discussion to get clarity on what *transparency* looks like so you can target your behaviors as the leader and hold the team accountable for theirs.

1. Introduce the discussion: *We all want to ensure that working together is as caring and respectful as possible, and we hear a lot about being transparent with each other. Let's drill down on what exactly that means, so we are demonstrating transparent behaviors with each other. Let's start by defining what transparency looks like.*
2. If the meeting is in person, hand out a 3x5 index card to each team member and have them write “transparency” at the top followed by their definition. If team members are remote, they can annotate on a whiteboard or post their definition on a message board.
3. Next, collect everyone’s cards, read them aloud, and capture their thoughts on an easel board or whiteboard so everyone can see the collective definitions. Note what themes are emerging such as being honest, being accessible, or trusting—and highlight the two to three most common.
4. Share what specific behaviors and actions you will commit to as the leader to embody the team’s collective definition of transparency.
5. Ask each team member to share a specific action or behavior they will adopt to demonstrate transparency with each other.

Note: This exercise can be repeated with any abstract words such as *being authentic, treated like a human being, trust, respectful*, among others.

2

How Work Got Done: The Great Pressure Cooker

SURVIVAL TACTIC

SHARE LUCY AND THE CHOCOLATE FACTORY

Show your team the three-minute YouTube clip, Lucy and the Chocolate Factory, and share a brief discussion around the following questions. Bring in a box of chocolates to share for some extra ambiance and fun. Make sure to send a treat to your remote team members too.

1. What do you think it was like working for a business fifty years ago? Do you have any stories your relatives may have shared?

2. How has work changed since then?

3. In what ways has it stayed the same?

4. In what ways can your job feel like working in a pressure cooker here?

5. What do we need to be mindful of as a result? How can we make work better?

3

The Elusive Pursuit of Employee Engagement

SURVIVAL TACTIC #1

VALUES CLARIFICATION EXERCISE

Employees today want a sense of meaning and purpose from the work they are doing. To understand how these drivers are impacting the engagement of your employees, the first step is to define what each of them values. Send this Values Clarification Exercise to the team and share the results with the group. Be sure to include yourself.

1. Cross off any values NOT IMPORTANT.
2. Circle those values that are MOST IMPORTANT. Add any that are missing for you.
3. From your MOST IMPORTANT values, rank order your top five.

Accountability	Creativity	Friendship	Learning	Responsibility
Achievement	Curiosity	Fun	Mastery	Security
Advancement	Decisiveness	Harmony	Meaningful Work	Self-awareness
Adventure	Democracy	Health	Merit	Self-respect
Arts	Diversity	Helping Others	Nature	Self-realization
Autonomy	Effectiveness Responsibility	Helping Society	Openness	Serenity
Beauty	Environmental	Honesty	Order	Sophistication
Belonging	Equality	Humor	Personal	Spirituality
Challenge	Excellence	Independence	Pleasure	Stability
Change	Excitement	Influencing	Power	Status
Collaboration	Expertise	Innovation	Prestige	Structure
Communication	Fairness	Integrity	Privacy	Teamwork
Community	Fame	Intellectualism	Productivity	Truth
Competence	Family	Involvement	Quality	Variety
Competition	Financial Gain	Knowledge	Recognition	
Cooperation	Freedom	Leadership	Relationships	

SURVIVAL TACTIC #2

VALUES ENGAGEMENT INVENTORY

MY TOP 5 VALUES	WAYS I DEMONSTRATE THIS VALUE AT WORK
1.	
2.	
3.	
4.	
5.	

After the team completes the Values Clarification Exercise, capture the information for your top performers and fill in the following grid:

PERFORMER	5 TOP VALUES	INDICATORS OF ENGAGEMENT AND FULFILLMENT

4

People Are *People*, First: Basic Needs and Motivators

SURVIVAL TACTIC #1

ARE YOU LEADING ON PURPOSE?

Refer to the story of the three different bricklayers. Each one had a different perspective of doing the exact same activity. Employees want a sense of a higher calling and a meaningful purpose to what they are doing for work. Is your team doing nothing more than laying bricks or are they erecting a cathedral? How you view the work is the same way your people will.

Think about the work you are leading. Describe it in three levels. Level 1 is the most basic tactical description of what the team does. Level 2 is somewhat more visionary. Level 3 captures the higher calling. For example, if you lead a team in the computer department at a big box electronics store:

Level 1: We sell computers.

Level 2: We help people make the best choice for their unique online needs.

Level 3: We empower people with ways to access information that matters most to them.

Your turn. What we do:

Level 1:

Level 2:

Level 3:

Create a draft of your own team purpose statement by answering these questions:

- Why does the team exist?

- What are the critical activities we perform?

- What do we want to be in the future?

- How will we get there?

Invite the team to contribute and edit the team purpose document so that it becomes the reflection of what they inspire to be. Refer to it regularly as a reminder of what everyone is ultimately aiming to achieve.

Keep the higher calling and team purpose visible:

- In what ways can you share tangible evidence of the impact the team is making in the lives of others?

- What can you do as a daily reminder of the higher calling of the team's purpose?

- In what ways are you recognizing and rewarding people on the team who demonstrate behaviors that support the team's higher calling and purpose?

SURVIVAL TACTIC #2

TEAM RALLY CRY OR SLOGAN

Create a team image or a rally cry that reflects the team's purpose. Start by asking the group to name three different adjectives they would like the team to be known for such as strong, kind, and resilient. Google the words, click images, and create a logo or a slogan for the team to remind them that the purpose and success of the team is always of a higher calling than going it alone.

5

Stressing Over Burnout

SURVIVAL TACTIC #1

GETTING MORE COMFORTABLE WITH AMBIGUITY AS A WAY TO COUNTERACT STRESS

One of the primary drivers of burnout and stress among leaders is living under the constant pressure of having to make decisions without always having 100% of the facts. The more you can get comfortable in working through ambiguity, and acting upon what you do know, the more resilience you can build from stressful indecision. Complete the assessment and refer to the following guide on improving your ability to deal with uncertainty and ambiguity as needed.

Read each statement and score your response using the following scale.

- | | | | | |
|----------------|-------|---------|----------|-------------------|
| (1) | (2) | (3) | (4) | (5) |
| Strongly agree | Agree | Neutral | Disagree | Strongly disagree |

STATEMENT	SCORE 1-5
1. I don't like working on problems that lack a clear-cut solution or outcome.	
2. I prefer having all the data before making a decision.	
3. I have a strong need to finish everything I start.	
4. The best way to solve issues is to apply tried-and-true solutions.	
5. I can balance many activities that are up in the air and still focus on getting results.	
6. It's important to get the "why" and the history before taking any next steps.	
7. I prefer details and specific directions before acting.	
8. When under pressure, I am less efficient and productive.	
9. Changes mostly result in rework or additional time needed to complete my work.	
10. I can comfortably shift gears in the moment.	
11. It upsets me when there's a sudden shift in priorities and my work is affected.	
12. I am afraid to fail and proceed cautiously as a result.	
Total	

48–60	Excellent:	Ability to deal with uncertainty and go with the flow
36–47	Good:	Can satisfactorily deal with change and move forward
24–35	Fair:	Somewhat able to deal with uncertainty but decision-making may be hampered
12–23	Low:	Inability to deal with uncertainty, restrained by stress and anxiety

WAYS TO HELP DEAL WITH AMBIGUITY AND UNCERTAINTY

Acceptance: It is impossible to predict the future. Instead of telling yourself that you have to be 100% certain all the time, write down how you would make decisions and move forward if you could be 80% certain.

Make small changes: Train yourself by making small, low-risk decisions. If you normally reread an important email three times, send it after two reviews. Break up habitual behaviors. If you normally have the same thing for lunch or eat in the same place, try something new and go somewhere different. Make a point to do something every day that is out of your normal routine.

Stop the fearful thinking: Many people struggle with ambiguity because of the fear of the unknown. Write down your source of the fear. Is it what others will think if you make a mistake? Fear of failing? Fear of being reprimanded?

Focus on past success: Because life is always uncertain, you already have a track record of dealing with ambiguity. Focus on the positive ways you have dealt with uncertainty in the past and apply what you've learned to any issues you're facing now.

Control what you can: Concentrate on what you can control, even if it's simple tasks, like running errands, meal planning, exercising, choosing to take some time each day for an activity you enjoy.

SURVIVAL TACTIC #2

HELP REMOTE WORKERS DEAL WITH ISOLATION

Many remote workers are combating feelings of being disconnected from the team and the organization. Help your remote team members feel more included with routine activities that encourage social interaction. Check out a few of these ideas:

Colleague Interview:

1. Set up a team online meeting. Pose a question like: *What was your favorite childhood toy? Why? Do you still have it? Best vacation? Your hero? If you could live anywhere? Proudest moment? Favorite movie? Book? Hobby? Food?*
2. Put two to three people in a Breakout room and have them interview each other on the one question you posed.
3. Return as a group and have the “interviewer” share what they learned from their partner.

Virtual Watercooler: Send a standing weekly invite to the team to voluntarily join the Watercooler for impromptu chat with other coworkers. You may wish to add a fun “topic of the week” for them to discuss, such as best vacation spot or worst food you’ve ever tried.

Team Meeting Kickoff Questions: Open up each team meeting with a kickoff question, similar to the examples in the Colleague Interview. Allow one to two minutes per person for their reply.

This Is My Life: Each month, have team members post a photo of something that represented their life that month. Have a few team members share their photo at each team meeting that month.

Guess the Desk: Each team member posts a close-up photo of their desk/workspace. Have team members guess whose space it belongs to.

Scavenger Hunt: Send a list of items for each team member to round up at home. Have team members share one or two of the items that they found: examples include favorite coffee mug, pet selfie, view from your window, family photo, wall art, pillow, board game, snack food.

Donut for Slack: As a casual opportunity for remote workers to chat and interact with each other 1:1, Donut (an app on Slack) randomly pairs team members from a predetermined list and distributes an email notification on a scheduled interval. It’s up to the team members to coordinate their chat break.

6

“I Quit” Signs Ahead

SURVIVAL TACTIC #1

AT-RISK EMPLOYEE ASSESSMENT

Most employees don't decide to randomly quit on the spot. There are signs to watch for. Review the following "I quit" signs and note any employees that may be at risk. Hold a 3-R conversation as soon as possible to learn if the Requirements, Rewards, or Respect may be out of balance.

"I QUIT" SIGN	TEAM MEMBERS AT RISK
<p>"I'd love to, but—"</p> <p>If this is the response when approaching a top performer about taking on a long-term project, it may indicate a hesitancy to commit to staying with the organization past their planned exit date.</p>	
<p>Active participation level decreases</p> <p>Watch for a decline in engagement. Instead of responding and providing input at team meetings, you observe a more passive role and less enthusiasm to get involved in the discussions. Top performers can be quite skilled in showing up to work without being present.</p>	
<p>Decline in productive behavior</p> <p>Is your normally punctual top performer starting to show up late? Do you see responsibilities falling through the cracks causing your always dependable person to be less reliable? These behaviors can be indicators of distractions and focus on other activities outside of their work.</p>	
<p>"Sorry, can't this time"</p> <p>Watch for a decline in initiative. Top performers usually go out of their way to please their leader by volunteering to go beyond what is expected of them. An enthusiastic willingness to stay late, clean up without being asked, and take on extra work that has waned into apologies for not being able to can be an indicator that they are on the way out.</p>	
<p>Increase in covert behavior</p> <p>There is a decline in their availability to want to connect, a delayed response to messages, and an overall decreased desire to communicate. If on-site, perhaps you've observed them blocking their computer screen, hitting an emergency delete button, or covering up paperwork that may indicate a search is in process.</p>	
<p>Gain of a surprise degree or certification</p> <p>Top performers are usually in pursuit of advancement and higher opportunities. If you are surprised that a top performer has been working on attaining a new degree, license, or certification, it can indicate a desire to become more attractive and marketable for new opportunities.</p>	

SURVIVAL TACTIC #2

PREPARE A PEOPLE PLAN

The best strategy for managing the vacancies among your team is to proactively prepare ways you can mitigate the loss. Start by mapping out the roles, skills, and current people in the positions.

POSITION NAME	CRITICAL SKILLS NEEDED

TEAM MEMBER	STRENGTHS	WEAKNESSES

PEOPLE PLAN REVIEW QUESTIONS

- Review each of the roles on your team and note the critical skills.
- Review the strengths among your team members. How do these strengths map to the skills you need for each role?
- Is there an overabundance of team skills in a certain area?
- Are there any critical skills needed that the team is missing?
- How can those critical skill gaps be addressed?
- Where can team members be cross-trained to cover these areas?
- Can any tasks be centralized to free up team members to gain these critical skills?
- If the person currently in any role decided to leave, what is the backup plan to cover the tasks?

7

The Great Balancing Act: Introducing the 3-R Scale

SURVIVAL TACTIC

SAME ROLE, TWO PERSPECTIVES EXERCISE

Employees doing the same job will likely have different perspectives on its pluses and minuses, which is important to know when balancing a 3-R scale. Consider two team members who have the same general responsibilities. List the job tasks, add each team member's name, and note how you think each one would rate that task, as a plus or a minus part of their job. Have them independently confirm your guesses.

JOB TASK	TEAM MEMBER		TEAM MEMBER	
	+	-	+	-

8

Requirements:

What Will This Job Need Me to Do?

SURVIVAL TACTIC

HAVE A 3-R REQUIREMENTS CONVERSATION

It's important to have your employees weigh in about the Requirements needed to successfully do the job and understand how the direct and indirect Requirements are impacting them. Start by holding a Requirements conversation with your top performers:

Begin the conversation: *I want us to stay connected on making sure the weight of your total tasks feels balanced for what you're receiving in return. It's important for me to understand which of the Requirements will impact you in both a positive and negative way. There are two types of Requirements: the direct tasks that need completing as part of the actual job [provide examples for their specific role] and the indirect Requirements that typically impact us in a more personal way as a result of the job, like commuting, setting up a home office, and the like. Here are some examples of direct and indirect Requirements: [share Sample Job Requirements]*

Let's look at your direct Requirements and assess their weight. List the ones impacting you in your current role and assign a weight from 1 to 5. A score of 1 is the least impactful or puts the least amount of stress on you, and a score of 5 would be the heaviest weight and most impact on you.

REQUIREMENTS ASSESSMENT

Team Member _____

Date _____

SAMPLE JOB REQUIREMENTS	
DIRECT	INDIRECT
<ul style="list-style-type: none"> • Strenuous physical activities • Exposure to physical safety hazards • Standing/sitting all day • Inside/outside environment • In front of a computer all day • Vaccinations/masks/tests • Unavailability of leader • Number of direct reports • On-site only/remote only • Extensive travel/after-hours events • Fast-/slow-paced culture • Lack of organizational strategy • Unfulfilling work • Lack of diversity/inclusion • Toxic culture/mistrust • Lack of communication • Unclear goals/expectations • Toxic boss • Psychological safety • Adapting to constant change • Work start/stop times • Expectations of response time • Lack of planning 	<ul style="list-style-type: none"> • Commute time/costs • Commute options: auto/train/bus/ferry • Sleep/exercise schedule • Meal/lunch prep • Nutrition/physical care • Purchase of clothing, equipment • Personal grooming • Availability for errands/home management • Work time crossing over into personal time • Inability to attend family events • Decreased social activities • Isolation issues/working remotely • Childcare needs • Parenting concerns • Pet care needs • Eldercare needs • Inability to pursue sports/hobbies • Level of mental energy available off work • Personal/family burnout • Reassessment of work as validation • Reassessment of life goals • Lack of higher purpose/boredom • Lack of control in general

List the major direct and indirect Requirements of your job as of today. Rank the degree of weight each of these direct Requirements is adding to your 3-R scale.

(1) None (2) Slight (3) Neutral (4) Substantial (5) Major

DIRECT REQUIREMENTS	RATING 1-5
INDIRECT REQUIREMENTS (OPTIONAL) AS YOU FEEL COMFORTABLE, FEEL FREE TO SHARE ANY INDIRECT REQUIREMENTS AND RANK.	

9

**Rewards: What Am I Getting
in Return for Doing This Job?**

SURVIVAL TACTIC #1

HAVE A 3-R REWARDS CONVERSATION

Explore the term *Reward* with each of your employees to understand what is most meaningful to them. Rewards can be major such as compensation and health benefits, or minor as a personalized card or snack treat.

Begin the conversation: *Rewards are best when they are the most meaningful to the person receiving them. I want to be sure that the Rewards you are receiving are of the most value to you, as well as Rewards that you may receive in the future. Please complete the “Getting to Know You” worksheet.*

GETTING TO KNOW YOU

Team Member _____

Date _____

- Backpacks
- Bonuses
- Bring pet/child to work
- Cards/thank-you notes
- Certifications
- Chair massages
- Coffee/teas
- Community volunteer opportunities
- Company swag
- Continuing education credits
- Day care
- Development programs/ create their own development plans
- Dining out
- Education reimbursement
- Engagement with key leaders
- Financial awards
- Gift cards
- Gym passes
- Hobby day
- Home office setup allowance
- Mentorship
- Movie/theater/concert tickets
- New/improved job title
- Paycheck
- Phone allowance
- Professional coach
- Sabbaticals
- Snacks
- Spa day
- Special projects
- Special recognition events
- Sporting events
- Tech gadgets
- Time off
- Training
- Transportation reimbursement
- Water bottles/sports gear
- Well-being resources

1. If you had an extra \$25, how would you spend it on yourself?
2. What are your favorite leisure activities? Hobbies?
3. Favorite color?
4. Favorite type of music?
5. Favorite reading genre?
6. Favorite snack food?
7. Favorite fast food?
8. Preferred way to be recognized? Publicly? Privately?
9. What other Reward would be most meaningful to you?

Make a list of the tangible rewards you currently receive. Rate them on a 1 to 5 scale.

(1)	(2)	(3)	(4)	(5)
No Value	Slight Value	Neutral	Substantial Value	Major Value

REWARDS	RATING 1-5

SURVIVAL TACTIC #2

TEAM MEMBER REWARD INVENTORY

Once you have each team member complete the Getting to Know You form, transfer the data to the Inventory Grid and track your Reward process:

MEMBER'S NAME	FAVORITE COLOR	HOBBY	FAST FOOD	SNACK FOOD	MUSIC	RECOGNITION PREFERENCES	REWARD NOTES/DATES

10

Respect: How Am I Feeling While Doing This Job?

SURVIVAL TACTIC

HAVE A 3-R RESPECT CONVERSATION

As with Rewards, it's equally important to have individual employees define what Respect means in their work setting, especially in the relationship with their leader.

Begin the conversation: *Just as with Rewards, it's important to define Respect. Apart from human civility, Respect can look different to the person receiving it. I want to be sure that the way we engage is supporting your definition of Respect. For example, ways that we communicate, conduct meetings, honor personal space, set boundaries, and manage each other's expectations, let's look at these examples and see if there's anything that needs to be customized for you.*

Discuss the Respect Definitions worksheet with each team member to establish guidelines for demonstrating respectful behavior in a way that is meaningful for both of you. Clarify any customized preferences and note, for example, what is this team member's preferred communication vehicle? Are there personal boundaries of sending messages after work hours? What is the expected response time?

What does autonomy look like for each team member? When can you be too hands-on or too hands-off? The more you clarify each other's expectations and definitions of respect, the more successfully you can increase the Respect weight on their 3-R scale with activities that are most meaningful.

RESPECT DEFINITIONS

Team Member _____

Date _____

TYPE	DESCRIPTION	YOUR THOUGHTS/PREFERENCES
Leader interactions	<ul style="list-style-type: none"> • Behaviors that demonstrate Respect 	
Communication	<ul style="list-style-type: none"> • Email, text, phone, team boards • Expected response times: within twenty-four hours, on/off business hours • Personal space 	
Meetings	<ul style="list-style-type: none"> • Frequency: 1:1s, team meetings, project meetings • Format: face-to-face, virtual, phone • Attendance: what meetings are high payoff/low payoff 	
Environment	<ul style="list-style-type: none"> • Location: on-site, remote, combination of office and remote • Preference: noise, privacy, collaboration 	
Level of autonomy	<ul style="list-style-type: none"> • What does that look like? • Too much? Too little? 	
Projects	<ul style="list-style-type: none"> • Preference: content, visibility • Interaction: team/individual 	
Learning	<ul style="list-style-type: none"> • Personal growth: parameters/limitations • Preference: desired experience 	
Social interaction	<ul style="list-style-type: none"> • Preference: introvert/extravert • Activities 	
Mental well-being	<ul style="list-style-type: none"> • Priorities • Description 	

11

It All Hangs in the Balance

SURVIVAL TACTIC #1

BALANCE YOUR OWN 3-R SCALE

Part 1: Think about your own job and how it plays across each of the 3-Rs: Complete the table for your current position. Directly following this activity sheet is Survival Tactic #2 which has been designed for each of your team members to complete and discuss their own 3-R scale balance with you.

REQUIREMENTS	REWARDS	RESPECT
In the order of impact, list the direct and indirect Requirements you must meet to succeed at your job. (Review chapter 8 for a detailed explanation and sample list of Requirements.)	In the order of value, list the Rewards being received or are missing in return for doing this job. (Review chapter 9 for a detailed explanation and sample list of Rewards.)	In the order of value, list the behaviors being demonstrated or missing that demonstrate Respect for the work you do. (Review chapter 10 for a detailed explanation and sample of customized areas of Respect.)
Direct	Rewards I'm Receiving	Respect I'm Receiving
Indirect	Rewards I'm Missing	Respect I'm Missing

Part 2: Share your lists of the Requirements, Rewards, and Respect with your own leader. Together, review the following questions to determine any next steps needed to balance your own 3-R scale. (See chapter 12 for reference.)

1. How does the weight of the Requirements compare to the weight of the Rewards you are receiving in return? Circle one:

A. The Requirements are equal to the Rewards. (Proceed to question 2.)

B. The Requirements are heavier than the Rewards. Answer the following questions:

- In what ways could the weight of the Requirements be decreased?

- In what ways could the Rewards be increased to balance the Requirements?

2. How does the weight of the Requirements compare to the weight of the Respect you are receiving in return? Circle one:

A. The Requirements are equal to the Respect. (Proceed to question 3.)

B. The Requirements are heavier than the Respect. Answer the following question:

- In what ways could the Respect be increased to balance the Requirements?

3. Consider the combined weight of the Rewards and the Respect. Is your 3-R scale in balance? How can you keep it that way? Do you anticipate any changes?

Can the combination of the Rewards and Respect be adjusted together in order to meet the weight of the Requirements? For example, is there something that can be added to the Respect weight that would decrease the need for an additional Reward?

SURVIVAL TACTIC #2

TEAM MEMBER 3-R SCALE

Team Member _____

Date _____

Part 1: Think about your current job and how it breaks down into each of the 3-Rs: Requirements, Rewards, Respect.

REQUIREMENTS	REWARDS	RESPECT
In the order of impact, list the direct and indirect Requirements you must meet to succeed at your job. (Review Chapter 8 for a detailed explanation and sample list of Requirements.)	In the order of value, list the Rewards being received or are missing in return for doing this job. (Review Chapter 9 for a detailed explanation and sample list of Rewards.)	In the order of value, list the behaviors being demonstrated or missing that demonstrate Respect for the work you do. (Review Chapter 10 for a detailed explanation and sample of customized areas of Respect.)
Direct	Rewards I'm Receiving	Respect I'm Receiving
Indirect	Rewards I'm Missing	Respect I'm Missing

3-R SCALE BALANCE QUESTIONS

Team Member _____

Date _____

Part 2: Share your lists of the Requirements, Rewards, and Respect with your leader. Together, review the following questions to determine any next steps needed to balance your 3-R scale. (See chapter 12 for reference.)

1. How does the weight of the Requirements compare to the weight of the Rewards you are receiving in return? Circle one:

A. The Requirements are equal to the Rewards. (Proceed to question 2.)

B. The Requirements are heavier than the Rewards. Answer the following questions:

- In what ways could the weight of the Requirements be decreased?

- In what ways could the Rewards be increased to balance the Requirements?

2. How does the weight of the Requirements compare to the weight of the Respect you are receiving in return? Circle one:

A. The Requirements are equal to the Respect. (Proceed to question 3.)

B. The Requirements are heavier than the Respect. Answer the following question.

- In what ways could the Respect be increased to balance the Requirements?

3. Consider the combined weight of the Rewards and the Respect. Is your 3-R scale in balance? How can you keep it that way? Do you anticipate any changes?

Consider the combined weight of the Rewards and Respect. Can they be adjusted together in order to meet the weight of the Requirements? For example, is there something that can be added to the Respect weight that would decrease the need for an additional Reward?

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TILT! Now What?

SURVIVAL TACTIC #1

DECREASE THE REQUIREMENTS WEIGHT

When the Requirements weight is too heavy for the Rewards and Respect being generated in return, a place to begin balancing a 3-R scale is with lightening the Requirements. Be as creative as possible. Consider these questions:

- Are any silent Requirements adding hidden weight? Are top performers either consciously or unconsciously taking on small tasks, or being hampered with low-priority administrative work that can be consolidated or delegated?

- What's the status of the technology? Does it make sense to provide or upgrade collaboration tools to make team communication and information processing easier and more efficient? Are team members complaining about poor visibility into the system and access to data needed to do their jobs?

- Can you provide additional flexibility in scheduling options? Shift times? Adjustable start and stop times? Remote or hybrid options?

- Are there opportunities to provide more collaboration with others? Can team members work together to make any tasks less burdensome?

- Can the job be realigned to the employee's specific skills and talents? Are there other options for getting the work done but in a different way? Can an employee batch more difficult tasks and do them together in a way or at different times that work better for them?

- Are there any opportunities for the employee to gain a sense of more control over the work they are doing? Have you asked for their input?

SURVIVAL TACTIC #2

MAKE MEETINGS MORE EFFICIENT

Meetings are one of the biggest culprits in adding additional weight to the Requirements. How many meetings do you hold per week? Per month? Can any of them be consolidated or streamlined? Are all team members required to attend all meetings?

Before sending the next meeting invite, consider—

- What is the purpose of the meeting? (inform, make a decision, take action)

- Is there any other way the information can be provided? (email, message board)

- What is the best format to conduct the meeting? (virtual, in person, hybrid, standup/huddle, 1:1, project team)

- How will each attendee add value to the meeting?

- Have you provided a planned agenda, with the purpose and meeting goals?

MEETING PLANNER GUIDE

Use this guide to help keep the meeting on track.

MEETING PLANNER

Meeting Name:	Organizer:
Date:	
Time:	
Location:	
Primary Goal for Meeting:	

Facilitator:	Attendees:
--------------	------------

Agenda Items			
Topic	Owner	Action	Next Steps

Notes

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How Culture Impacts a 3-R Scale

SURVIVAL TACTIC #1

HEALTHY CULTURE ASSESSMENT

Culture is an important foundation for a 3-R scale to be successfully set up and maintained. Complete the following assessment to determine the strengths and weaknesses of your current culture. Invite team members to complete as well and compare results.

(1) (2) (3) (4) (5)
 Strongly agree Agree Neutral Disagree Strongly disagree

TRAIT	DESCRIPTION	SCORE 1-5
Respect	Everyone is treated with dignity and regarded for who they are as people.	
Nurturing	Employees feel that their personal strengths are leveraged.	
Appreciation	The focus is on what is right, not wrong.	
Communication	There is an open exchange to freely contribute thoughts and ideas without fear of admonishment.	
Access	Employees have access to information across all levels of the organization.	
Learning	Everyone has opportunities for collaboration, coaching, and training.	
Clarity	Employees fully understand the direction of the organization and the <i>why</i> behind any changes.	
Accountability	Leaders and employees hold each other accountable for the integrity and acceptable behaviors they champion.	
Encouragement	Despite setbacks, effort and initiative are recognized and rewarded.	
Innovation	Employees are applauded for thinking creatively.	

SURVIVAL TACTIC #2

TEAM MISSION STATEMENT

A team mission statement is a brief statement that describes a team's reason for existing. It helps to define the team culture and the way the team wants to be perceived. Team members work together to establish a common purpose and goal for their work together. The statement should also reflect the higher calling for the reason behind the work the team does.

How to create a team statement:

1. **What do we do?** In a few sentences, write down what your team does, what it delivers, or what it produces. If your team provides several different services or deliverables, choose the ones that account for 80% of the work. For example, *“Our team schedules patient follow-up visits.”*
2. **Who are you doing this work for?** Clarify who your most important internal and external customers are. For example, are you scheduling patient follow-up visits for the home nurses or for the patients themselves? Be clear who you are partnering with.
3. **Why are we doing this work?** What is the ultimate outcome of the work you do? How is the final customer impacted? For example, *“Our team schedules patient follow-up visits so the nurses maximize the efficiency of their time in the field and the patients get the care they need in a timely fashion.”*

OUR TEAM MISSION STATEMENT

What

Who

Why

SURVIVAL TACTIC #3

TEAM ACCOUNTABILITY AGREEMENT

High performing teams have a team mission statement and hold each other accountable to fulfill it. The purpose of a Team Accountability Agreement is to come to a consensus on the rules of engagement to work together. All team members must be included in the creation of the Team Accountability Agreement. Review the agreement frequently and update as needed. Be sure to include it as part of the onboarding materials with new team members.

Here are examples of topics covered in a Team Accountability Agreement and questions to consider:

COMMUNICATION

- How will team members communicate with each other? What is the acceptable response time to messages?

- When are team meetings scheduled? What is the process if a team member is unable to attend? Who should attend the meetings? What is the expected behavior (virtually with camera on?) during the meetings? Will team meetings start and end on time? Who will monitor it?

DECISION-MAKING

- How will everyone have the opportunity to have a voice on team decisions?

- How will a final consensus be made by the team?

RESPONSIBILITY

- What is the process if unforeseen circumstances prevent a team member from completing a contingency project on time?

- What is the process if difficult or unclear responsibilities need to be voiced to other team members so that they can be clarified or redefined?

- How will concerns or issues that need resolution be processed?

LEADERSHIP

- Who is the primary facilitator for team meetings? Will it be rotated?

- Who is responsible for compiling the team agenda and directing the flow of the meeting?

CONSEQUENCES

- What is the process for not adhering to these team agreements? Who will enforce it?

TEAM ACCOUNTABILITY AGREEMENT

Team Name _____

Date _____

TOPIC	DESCRIPTION OF AGREEMENT

Team Signatures

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Great First Touches Make for Greater First Impressions

SURVIVAL TACTIC #1

3-R INTERVIEW QUESTIONS

Interview questions should determine a candidate's skill and cultural fit as well as provide early indicators of the potential of a balanced 3-R scale. Once skill and culture fit are established, the focus of the next interviews should turn to getting an early sense of the weight the candidate will feel in meeting the Requirements of the job. Check out these examples of 3-R questions to ask:

REQUIREMENTS

- Take a look at the major Requirements of this position (prepare a list of the direct Requirements). Which of these tasks are more favorable? Why? Which of these would be your less favorable? Why?

- In any working experience, what have you most enjoyed? Least enjoyed?

REWARDS

- Of the various items received in exchange for doing a job, such as compensation, benefits, and fulfillment, which are the most important for where you are in life right now?

- What other perks of the job would be most meaningful to you?

- What types of Rewards would be least meaningful?

- What was the best way you were acknowledged for doing an outstanding job? Why was it memorable?

- What do you most appreciate being recognized for at work?

RESPECT

- As you think about the previous leaders you have worked for, give some examples of what they did that made you feel the most respected.

- What did they do that made you feel the least respected?

- Trust is an important part of a successful working relationship. Give an example of when you felt a leader trusted you. Give an example of when you felt a leader did not trust you.

SURVIVAL TACTIC #2

FIRST-DAY CHECKLISTS

ON-SITE

√	PRIOR TO FIRST DAY
	Assign a buddy: Meets employee upon arrival and assists them the first week.
	Prepare first-day agenda: Set up meetings as needed.
	Make lunch plans: Make reservations or arrange to have food delivered.
	Prepare workstation: Clear and clean! Provide copy of first-day agenda, basic office supplies, water bottle, welcome sign, balloon.
	Prepare credentials: Arrange for ID card, badge, key fob, business cards.
	Prepare tech: Have equipment ready with software and log-ins.
	Mail welcome card to home: Have team members sign, include a company logo gift.
	Send welcome email: Include arrival details with map, address, parking instructions, lunch plans, list of nearby amenities, name of buddy who will meet them in the lobby.
	Prepare welcome event: Send invite to team for welcome coffee/donuts event.

√	FIRST DAY
	Lobby greeting: Have buddy meet employee in lobby to assist with check-in process and escort to workstation.
	Welcome event: Team members (include remotes) to gather for coffee and introductions.
	1:1 morning meeting with leader: Connect privately with employee early in the day.
	Lunch: Make it special. If delivered, invite other team members to join.
	1:1 end-of-day meeting with leader: Follow up on how the day went, ask for feedback on ways it could have been better, discuss itinerary for the rest of the week.

REMOTE

√	PRIOR TO FIRST DAY
	Assign a buddy: Virtually assists them the first week.
	Prepare first-day agenda: Set up meetings as needed.
	Make lunch plans: Arrange for lunch to be delivered to employee's home. Include lunch for remote workers and on-site team too. Set up virtual lunch time so all can eat together if logistics permit.
	Prepare welcome box: Send a package to employee's home that includes a welcome card, office supplies (or arrangements for ordering), company logo gift.
	Prepare tech: Get equipment ready for delivery with software and log-ins.
	Send welcome email: Include first-day itinerary, first-day log-in time, links to collaboration tools, IT contact. Copy buddy to assist with setup and questions during first week.
	Prepare welcome event: Arrange to deliver coffee and donuts to employee's home.
	Arrange for on-site meeting: If possible, set up an on-site visit during employee's first week.

√	FIRST DAY
	Welcome event: As possible, have all team members connect for coffee and introductions.
	1:1 morning meeting with leader: Connect privately with employee early in the day.
	Lunch: As possible, have all team members connect virtually for lunch.
	1:1 end-of-day meeting with leader: Follow up on how the day went, ask for feedback on ways it could have been better, discuss itinerary for the rest of the week.

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The Power of a 3-R Leader

SURVIVAL TACTIC

3-R LEADER INVENTORY

3-R LEADER TRAIT	WHAT I'M DOING WELL	HOW I CAN GROW
Be a strong servant leader.		
Know every team member as an individual.		
Hold ongoing 3-R conversations with all employees, starting with top performers.		
Showcase purpose and fulfillment behind the work being done.		
Encourage risk and innovation.		
Model and reward the behaviors you want.		
Create calm not chaos.		
Come from gratitude.		
Speak the truth.		
Delegate and empower.		

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On-site, Remotes, and Hybrids, Oh My!

SURVIVAL TACTIC #1

ADDITIONAL CHALLENGES OF REMOTE WORKERS

If you are leading remote team members, it is critical to take the time to fully understand the unique impact that working from home may have and how it's affecting the balance of their 3-R scale. For some it will be an ideal working environment and will not have a negative impact on their Requirements weight. Others may find that working remotely has additional and unexpected challenges.

Review the primary reasons for remote worker burnout to see if any of them resonate as you think about each of your remote workers. Ask them if they identify with any of the following challenges and mitigate as needed.

REVIEW ADDITIONAL CHALLENGES OF WORKING REMOTELY

REMOTE CHALLENGE	TEAM MEMBERS TO WATCH
Fear of missing out (FOMO)	
Feelings of loneliness	
Always needing to be on mentality	
Missing out on professional development opportunities	
Inadequate working environment	
Lack of discipline and accountability	

SURVIVAL TACTIC #2

REMOTE LEADER BEST PRACTICES

√	BEST PRACTICE
	I trust my employees until there's a reason not to.
	I provide extra positive attention.
	My team has a say in the remote and hybrid policies.
	My remote workers have the resources needed to achieve their goals.
	I allocate equal opportunity and time for my remote employees to be heard.
	I have communicated clearly defined digital policies such as cameras required when attending meetings, expectations for message response times, and online availability.
	My remote workers have been provided with dependable technology and equipment.
	Every remote worker has access to a robust and easy collaboration software.
	I provide continual feedback: positive and constructive.
	I regularly set up virtual opportunities to casually connect with coworkers.
	Required meetings have a purpose, and remote workers are clear what value they will contribute.
	The virtual processes to connect with the team and the organization are easy.
	I focus on their results not hours or monitoring software to determine their value and contributions to the business when assessing their performance.

SURVIVAL TACTIC #3

HYBRID STRATEGY PLAN

Defining your hybrid vision and setting up the guidelines to maintain it is an important part of a successful hybrid option. Make sure the rules and guidelines are clearly and consistently communicated so all members understand the expectations.

What are the guidelines that qualify a position to have a hybrid option?	
Is there a minimum number of on-site days required each week? If so, how many?	
Are the on-site days and remote days standardized for all hybrid workers or can they be customized per individual employee?	
If customized, can the on-site days and remote days change from week to week?	
Are there events such as team meetings that require hybrid employees to attend in person?	
Will on-site employees be required to attend all virtual meetings? At their own workstation, or together in a conference room?	
When hybrid employees are on-site, will they have a hot desk or independent workstation?	
When on-site, are hybrid employees held to the same office hours as on-site employees?	
If a hybrid worker isn't able to be on-site as expected, who does the employee inform and how are they notified?	
Do all hybrid employees have access to the same technology, equipment, and tools?	
What standards and metrics will be used to measure a hybrid employee's performance?	

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**Every Employee Is a
3-R Scale in Process**

FINAL SURVIVAL TACTIC PERSONAL COMMITMENT

What were the top three points you took away from this book?

1. _____
2. _____
3. _____

List three commitments you will make in the immediate future to begin implementing a 3-R leadership approach.

1. _____
2. _____
3. _____