

TEAM PLAYBOOK

SALES AND MARKETING

Cross Functional Offsite

January 6, 2011

Talent Analytics

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Work In Progress Coaching
www.wipcoaching.com
831) 685-1480

Team Playbook

Team Playbook / Team Communications Guide to Help Anticipate and Describe Team Interactions

Business Challenge - Ineffective Communication

Businesses work effectively when teams and individuals have respect for and communicate easily. Leaders and cross-functional teams can have very different approaches, different personalities and different styles. Misunderstandings can occur when teams, leaders and individuals don't understand the other, resulting in wasted time, polarization and hurt feelings.

Solution - Practical and Elegant Team Playbook

Talent Analytics, Corp.'s Team Playbook is a quick, elegant and very effective solution. The Team Playbook provides a one-page summary on each individual on the team. The Playbook provides "Communication Tips and Traps" for both the team and each individual on the team. Team Playbooks tend to be highly utilized tool.

Extra Credit Suggestion

Consider gathering Playbook information for all employees and placing communication suggestions into your corporate name and address book. (Imagine being able to access "communication suggestions" on employees you've never worked with.)

- ⊙ Strategy / Talent Alignment - align talent with business strategy*
- ⊙ Build project teams based on project requirements

Mergers and Acquisitions

- ⊙ Post merger integration to help managers hit the ground running with new teams

Create High Performing Teams

- ⊙ Allow new managers and executives to avoid landmines with team
- ⊙ Promote objective understanding of teams
- ⊙ High value on-boarding tool enabling new managers (and employees) to quickly onboard

Organizational Analysis and Design

- ⊙ Create communications roadmap for different areas of the organization
- ⊙ Not a one size fits all approach to organizational communication
- ⊙ More effectively manage change initiatives

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TALENT ANALYTICS, CORP.
146 MOUNT AUBURN STREET
CAMBRIDGE, MA 02138

P 617-864-7474

E INFO@TALENTANALYTICS.COM

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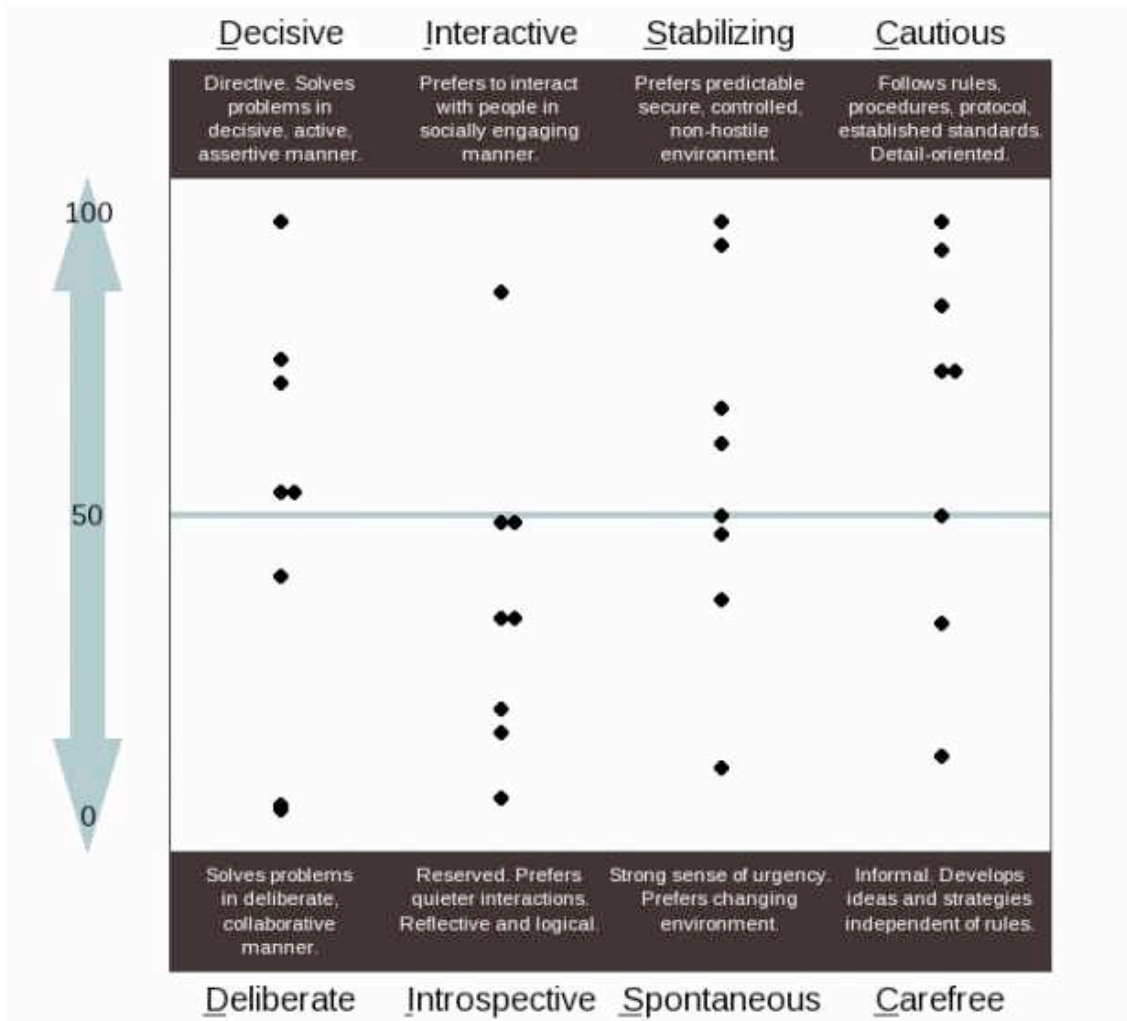
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Team Performance Style

This team view provides a rare opportunity to visualize how an entire team is interacting (or will interact). Either a variety or a narrow set of styles can be ideal, depending on business goals and team responsibilities. (Note: a score near the top of the column is not necessarily positive. Similarly, a score near the bottom of the column is not necessarily negative).



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Team Ambitions

This team view provides a rare opportunity to visualize what this team values, their combined ambitions and agenda. Team ambitions are ranked in order of importance to the team. Ambitions define a team business culture. The team will drive for decisions most closely aligned with their top 3 Ambitions. An ideal set of Ambitions depends on business goals and team responsibilities.

Ambitions	1	2	3	4	5	6	7
Authoritative	•••		•••	•			
Individualistic		•••	••		•	••	
Economic	••	•		•	•••		•
Creative	•	•		••	••	•	•
Altruistic		••	••	•			•••
Political	•	•			••	•••	•
Theoretical			•	•••		••	••

Team Playbook

Fiona Denver

Tips for Communicating with Fiona

- ⊙ Be certain that the information you provide to her is credible.
- ⊙ Provide Fiona with assurances about her input and decisions.
- ⊙ Provide Fiona with clear, specific solutions, and support your position.
- ⊙ Prepare your case in advance of meeting with Fiona; don't "wing-it" using charm alone.
- ⊙ Take your time to be precise and thorough.
- ⊙ Provide Fiona with a specific, step-by-step timetable with names and responsibilities.
- ⊙ Use a thoughtful and logical approach to discussing ideas and options with Fiona.

Traps When Communicating with Fiona

- ⊙ Fiona prefers that you do not approach her with a delivery that is rude, abrupt, or too fast-paced.
- ⊙ Don't leave her with an idea or plan that lacks backup support.
- ⊙ For a positive response, don't use quick manipulations of ideas with her.
- ⊙ She will respond well if you are not careless or haphazard.
- ⊙ For the best response, don't offer her assurances and guarantees you can't fulfill.
- ⊙ Don't be disorganized or sloppy with her.
- ⊙ Don't patronize or demean her by using incentives or subtlety.

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Jacqueline Sanford

Tips for Communicating with Jacqueline

- ⊙ Jacqueline will prefer that you stick to business matters only.
- ⊙ Do your homework for your meeting with her and be prepared with goals, objectives, support materials, etc., but don't plan on using all of them. Have the material with you as support.
- ⊙ Motivate and persuade Jacqueline by referring to objectives and expected results.
- ⊙ Be specific with her about what needs to be done, and who is going to do it.
- ⊙ When agreeing with Jacqueline, support the ideas and potential results, not the person.
- ⊙ Provide options for Jacqueline to express her opinions and make some of the decisions.
- ⊙ Be prepared to handle some objections.

Traps When Communicating with Jacqueline

- ⊙ Don't come with a "ready-made decision", unless you are ready to accept her changes.
- ⊙ Jacqueline prefers that you avoid wild speculations - - without factual support.
- ⊙ She will lose respect if you forget or lose things necessary for the meeting or project.
- ⊙ Jacqueline doesn't want to be confused or distracted from the business issues at hand.
- ⊙ When disagreeing with her, don't let it reflect on her personally.
- ⊙ Jacqueline prefers that you avoid asking rhetorical, useless, or irrelevant questions.
- ⊙ Jacqueline wants you to avoid rambling discussion, and wasting her time.

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Jane Dandy

Tips for Communicating with Jane

- ⊙ Give her time to verify the issues and potential outcomes.
- ⊙ She will respond well when you use a thoughtful and logical approach to discussing ideas and options.
- ⊙ Provide her with logical and practical evidence when speaking.
- ⊙ Take your time with her, be precise and thorough.
- ⊙ She prefers that you are accurate and realistic, don't over-inflate ideas or outcomes.
- ⊙ Do your homework, because Jane will have already done her share of it.
- ⊙ List pros and cons to suggestions you make when communicating with Jane.

Traps When Communicating with Jane

- ⊙ Jane will not respond well if others provide special "personal" incentives.
- ⊙ Jane will lose respect for someone who tries to use someone else's "opinions" as evidence.
- ⊙ You will encounter pushback and lack of buy in from Jane, if you use unreliable (unsubstantiated) evidence or testimonials.
- ⊙ She has less respect for others that are careless or haphazard.
- ⊙ Jane will lose respect if someone is unrealistic with deadlines.
- ⊙ Jane does not respond well if someone tries to use quick manipulations of ideas.
- ⊙ Jane will not respond well if others push too hard.

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Jeffrey Jones

Tips for Communicating with Jeffrey

- ⊙ Jeffrey will prefer that you keep on task- focusing on business agenda.
- ⊙ Be efficient with Jeffrey. Hit the major points first.
- ⊙ Be accurate and realistic, don't over-inflate ideas or outcomes.
- ⊙ Provide logical and practical evidence to him.
- ⊙ Get to the point quickly, and don't ramble.
- ⊙ Provide options for Jeffrey to express his opinions and make some of the decisions.
- ⊙ Stick to business matters only.

Traps When Communicating with Jeffrey

- ⊙ He prefers that others don't direct or order.
- ⊙ He prefers that others don't rush the issues or the decision-making process. Just let him know the clock is ticking.
- ⊙ Jeffrey does not want to be confused or distracted from the business issues at hand.
- ⊙ Don't come to Jeffrey with a ready-made decision, unless you are open to accept changes.
- ⊙ Jeffrey will have a negative reaction if others are disorganized or sloppy.
- ⊙ Don't fail to follow through with Jeffrey. If you say you're going to do something, do it.
- ⊙ Do not leave things up in the air, or to work out by chance if you are looking to gain respect from Jeffrey.

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John Publick CFO

Tips for Communicating with John

- ⊙ When disagreeing with John, take issue with the methods or procedures, not with the person.
- ⊙ Offer him input on how to make the ideas become reality.
- ⊙ He would prefer communicating with someone that is engaging, stimulating, and fast-paced.
- ⊙ Ask for his input regarding people and specific assignments.
- ⊙ When communicating with John, put the details in writing, but don't plan on discussing them too much.
- ⊙ Provide options for John to express his opinions and make some of the decisions.
- ⊙ Plan some extra time in your schedule for talking, relating, and socializing with him, but let him take the lead, and don't be surprised if the socializing ends abruptly.

Traps When Communicating with John

- ⊙ Don't come with a ready-made decision when working with John, unless you are ready to discuss a variety of options and accept changes from him.
- ⊙ Don't make decisions for him as this will result in pushback from him.
- ⊙ Don't stick too rigidly to the agenda. Follow his initiative when he leads the way to more of a social conversation.
- ⊙ Don't "dream" too much with him or you'll lose time. Additionally, you risk having him feel as if you are wasting his time as well.
- ⊙ John will have a negative reaction if you forget or lose things necessary for the meeting or project. He is ready to make things happen and losing or forgetting things will get in the way of progress.
- ⊙ John prefers that you avoid leaving loopholes or vague issues hanging in the air. He will feel anxious in this vague state and will want to resolve everything in a concrete manner.
- ⊙ John prefers that you avoid making guarantees and assurances when there is a true risk in meeting them.

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Leonard Nimoy

Tips for Communicating with Leonard

- ⊙ Leonard will follow through on his part; be certain to follow through on your part.
- ⊙ Outline individual tasks and responsibilities in writing with Leonard.
- ⊙ Take your time to be precise and thorough.
- ⊙ Use a thoughtful and logical approach to discussing ideas and options with Leonard.
- ⊙ Find some areas of common interest and involvement with him.
- ⊙ Make an organized appeal for his support and contributions.
- ⊙ Observe Leonard for possible areas of disagreement, as he may not be immediately verbal about them.

Traps When Communicating with Leonard

- ⊙ Don't force him to agree quickly with your objectives and position; provide him with some time to warm up to the ideas and for mutual ownership.
- ⊙ Don't be disorganized or sloppy with him.
- ⊙ Don't make decisions for him.
- ⊙ Don't manipulate or bully him into agreeing.
- ⊙ Don't whine to him about all of the work you have to do.
- ⊙ Don't offer Leonard promises you can't keep.
- ⊙ Don't rush into business or your agenda with him; provide some time for him to break the ice.

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paul O'neill

Tips for Communicating with Paul

- ⊙ Do your homework, because Paul will have already done his share of it.
- ⊙ Be accurate and realistic with him, don't over-inflate ideas or outcomes.
- ⊙ Give him time to verify the issues and potential outcomes.
- ⊙ Find some areas of common interest and involvement with him.
- ⊙ Assure him that there won't be unexpected surprises.
- ⊙ If you tell him you're going to do something, do it.
- ⊙ Approach issues in a straightforward, direct and factual way with him.

Traps When Communicating with Paul

- ⊙ Don't rush into business or your agenda with him; provide some time for him to break the ice.
- ⊙ Don't threaten Paul with your position or your power.
- ⊙ Don't push him too hard.
- ⊙ Paul prefers that you do not leave things up in the air, or to work out by chance.
- ⊙ Don't leave him with an idea or plan that lacks backup support.
- ⊙ For the best response, don't offer him assurances and guarantees you can't fulfill.
- ⊙ Don't manipulate or bully him into agreeing.

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William Shatner

Tips for Communicating with William

- ⊙ William would prefer that you break the ice with a brief and personal comment.
- ⊙ Present your ideas and opinions to him in a non-threatening way.
- ⊙ Be casual and informal with your gestures and body language.
- ⊙ Ask him "how" oriented questions to draw out his opinions.
- ⊙ Outline individual tasks and responsibilities in writing.
- ⊙ If you say you're going to do something, do it.
- ⊙ Provide him with clear, specific solutions, and support your position.

Traps When Communicating with William

- ⊙ When working with William, don't be domineering or demanding.
- ⊙ He prefers that you are not rude, abrupt, or too fast-paced when delivering information.
- ⊙ Don't suggest an idea or plan to him without supporting materials.
- ⊙ Don't say to William, "Listen to me, here's how I think we should do it".
- ⊙ Don't force him to agree quickly with your objectives and position; provide him some time to warm up to the ideas and for mutual ownership.
- ⊙ When meeting with him, William prefers that you do not stick coldly to your business agenda.
- ⊙ Don't rush into business or the agenda with him; provide some time with him to break the ice.

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