

The Leader's Guide to DESIGNING THE RELATIONSHIP WITH YOUR NEW GROUP

Establishing a relationship with your new group or team is simple, common sense, and straight forward. This guide walks you through a series of conversations that help you get to know each other and decide how you'll work together going forward.

Use this template to help you guide the discussion.

Best For



Leaders working with a group that's new to them.

Leaders new to the job.

Teams of 5 or more people.

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INTRODUCTION

Design the relationship with your new group early.

Establishing a relationship with your new group or team is **simple, common sense, and straight forward**. In many organizations, it's a missing piece in the puzzle called working together.

Most people don't talk about their relationship until they notice a problem; either something is not working or something is missing. Often at this point, it requires outside help to get back on track.

Why does this happen?

- Most of us have been raised not to talk about our relationships.
- It can be a bit uncomfortable — perhaps.
- We think of designing “things”, not relationships.

There are **two major elements of designing the relationship** with your new group. They are:

Step A: Get to know each person in a way that allows for safety, permission, and candor in the relationship.

Step B: Hold a group meeting to design your relationship.

Depending on group size and the circumstances, you may not be able to complete Step A before you have the group meeting—Step B. At least start the process of meeting with everyone individually so that your group knows it is a part of how you intend to begin working with the new group.

Step A: Get to Know Each Person

The quality of the relationships walking into the group meeting determines the quality of the conversations in that meeting.

Can you answer these questions about each of the people who work for you?

- What four things interest you in life?
- What has been your career path?
- What are you trying to master in life?
- What else do you want me to know about you?
- What would aid me in supporting you?

If not, it's a good idea to have a conversation with each of them and explore several or all of these questions. This preparation with each team member will provide the safety and candor required to make the team conversation work.

If you are located in the same office, consider having this conversation over coffee.



If you or your team member work remotely, video conferencing works best for this conversation. The ability to see each other will greatly increase the strength of the relationship you can create.

Once you've learned about the people on your team, it's time to schedule the conversation with the whole group.

Step B: Conversations with the Whole Group

ABOUT

The online template organizes all these conversations into a single agenda. **It's fine, however, if you space these conversations out over a day or two.**

In fact, the first conversation is often best done over a glass of wine or dinner.

- ① What can I tell you about myself?
- ② Agreements
- ③ Handling Problems
- ④ Meetings
- ⑤ Coaching for the New Leader
- ⑥ Other Conversations
- ⑦ Closing

STEP-BY-STEP MEETING INSTRUCTIONS

Before the meeting

Decide what you want to share in each conversation.

Every conversation in this series starts with you, the new leader, sharing your perspective and intentions for that topic.

To lead the conversation well, you'll need to be ready to discuss each topic with confidence. Some of these topics may not be ones you've considered in this way before.

You'll find a [worksheet to help you prepare on page 11](#).

Review and update the agenda (if necessary).

If you are meeting face-to-face, you can reserve an afternoon for this conversation and run it all at once. However, if you're meeting with remote participants, you may want to break this into two or more shorter sessions.

Schedule the meeting and invite your team.

For remote participants, use video conferencing during this call to strengthen the personal connection.

During the meeting

1

What can I tell you about myself?

Begin by spending 6-8 minutes briefly answering this question.

What can I tell you about myself that might make it easier to understand me and work with me?

Then, open up the conversation to questions from your group with these set-up questions:



- What else would you like to know about me?
- Is there anything at all about which you are curious, wondering, anxious or concerned about working with me?

Then, simply open it up to the group and wait quietly.

Don't say anything if the questions come slowly. There may be some hesitancy in surfacing questions or concerns. Don't make any remarks about the slowness.

This is your chance to show that you want to listen to the group, which is something they may not have expected from their previous leaders. Just take your time and know that over time the capacity to talk about anything will build in the group.

Common questions you might be asked:

- Tell us about your career?
- What do you expect of us?
- What do you do for fun?
- What level of communication do you expect?
- How flexible are you about work hours?

2

Agreements

What agreements shall we put in place?

Agreements often tip the balance toward special relationships. They are designed to prevent common mischief from happening and provide permission to talk about things that do happen.

These are the most powerful agreements to put in place as a supervisor.

The 5 Power Agreements



1. Let's be clear about goals and expectations. If one of us is not clear, let's meet and discuss.
2. You can ask me anything at any time. You can ask me anything about working for me or this organization—anything at all about which you might be curious, wondering, or concerned. I promise to tell you what I know.
3. I promise to tell you within one week if I have any concerns about your performance.
4. Let's agree on how we want to be in touch with each other in terms of frequency and method.
5. I promise to have your back.

Sometimes additional agreements make sense in a group. You'll find more examples in the [worksheet on pages 12 and 13](#).

Based on your experience and your new group's experience, **choose 3-5 agreements that make sense to emphasize in your first 3 months together.**

3

Handling Problems



Given problems will occur, how will we handle them?

There are four parts to this conversation.

1. Begin this conversation with your thoughts on how you would like the group to surface and deal with problems.
2. Then ask 3-4 team members to share their thoughts.
3. Then ask others to join the conversation if they have points not yet expressed.
4. Then summarize the conversation and thank everyone.

4

Meetings



How would you like to handle meetings?

Effective meetings are at the heart of effective groups. Many organizations have dis-empowering perspectives around meetings. As a new supervisor and manager, it can be useful to establish a new approach. This conversation would give you the starting place you need.

During this conversation:

1. Share your thoughts about best meeting practices and what you intend to put into place.
2. Open up the conversation to the group. Ask: "What would you like to be true about our meetings?"
3. Agree on an approach for going forward.

5

Coaching for the Leader

Next, ask the group:

If you were coaching me to have a greater impact on the organization, what would you tell me?

6

Other Conversations

Now that you have shared agreements and a better understanding of each other, it's time to make sure anything else that needs to be said comes out.

Ask the group:

Are there other conversations that we need to have?

If this question reveals a significant new topic, you do not have to address the conversation in the moment.

Set a time for any new conversations you need to have within the next two weeks.

7

Closing

To close the meeting, take some time to re-state and review all the agreements and mutual expectations the group set.

- Review your core agreements.
- Review what you'll do when problems arise.
- Review the expectations about meetings.
- Review any action items or next steps, such as scheduling any follow-on conversations.

End the meeting by acknowledging individual contributions and thanking the team as a whole for their participation.

AFTER THE MEETING: RELATIONSHIPS IN PRACTICE

Send out a follow-up email, which makes sure everyone gets a thank you and a short summary of the discussion in their email.

Determine the best way to keep these agreements visible for your group.

This makes it easy for people to refer back to them whenever a problem arises in the group.

When new people join the group, share these agreements with them. Then, invite them to ask questions and share their perspective on the agreements in your next group meeting.



Review and confirm your agreements every 3 to 6 months.

Every team evolves. Over time, the group will learn more about what it means to work together, the kinds of problems they encounter most often, and on which agreements the group needs to put more attention and focus over the next 3 months.

If everything seems to be going well, you can complete this review as a single agenda item in a regular meeting. If things are rocky, or even if they're just OK, schedule a separate meeting to get re-aligned as a team.

NEW LEADER'S WORKSHEET

This worksheet is designed to help you prepare for a successful group meeting. Reflect on the questions below and get clear about your intentions for each part of the conversation.

“Know thyself.”

~ Socrates



If you want to make a few notes about things you'd like to talk about, do so. And also, just trust yourself, your new group and the conversation. You'll be fine if you figure out what you have to say when the time comes. This is not the time for PowerPoint or anything that constrains you or the conversation. Just be yourself.



Conversation 1.

What should people know about working with you?

Questions to consider:

- What can you tell the group about yourself that might make it easier to understand you and work with you?
- What special skills, knowledge and resources do you bring to the team?
- What would you love to be true in how this team works together?

Conversation 2.

What agreements do you want to put in place and know you can support?

[Page 7](#) lists the “5 Power Agreements”.

Review the additional Agreements and Core Practices on the next pages, then consider **the 3 - 5 you most want to focus on** with the group in the first 3 months.



Agreements and Core Practices

Share information.

Ask for what you need.

Anticipate what others in the group might want to know.

When asked for information, share everything you can think of.

Be aligned on our strategic intent and current projects.

If we are not aligned, communicate.

If progress slows or stops, acknowledge it.

Keep resources and energies focused.

Act consistent with being on each other's side

Manage each other's reputation (say only positive things).

Be supportive and helpful.

Be inclusive, invite people who may have an interest or may want to contribute.

Look out for the interests of our group, our people, and our company.

Communicate with each other completely.

If we have questions, ask.

If we aren't aligned, say so.

If something doesn't work, say so.

Be receptive to people questioning or challenging our thinking.

Listen respectfully and generously.

Pay attention to what the person is saying.

Allow people to finish.

If you have any doubt that you understood, always verify your understanding.

Check for completion: Is the person finished? Is there anything else?

Make and keep commitments with one another.

Use X by Y (who will do what by when?)

Be specific about what the commitments are.

Call if your commitment is in danger of not being fulfilled.

Track all commitments.

Manage our conversations so they are effective.

One conversation at a time.

One person speaking at a time.

Be clear about the outcome we seek and the process we will follow.

Clear about closure: where are we leaving this conversation?

Acknowledge and appreciate each other.

Look for what can be acknowledged: tell people what you appreciate, what works.

Practice acknowledgment frequently.

Be authentic.



Conversation 3.

Given problems will occur, how do you want to handle them?

Questions to consider:

- What do you want the group to do when they learn about a problem?
- How do you want to learn about problem?
- As a group, how do you want to surface and deal with problems together?



Conversation 4.

How would you like to handle meetings?

Questions to consider:

- What regular team meetings do you expect everyone to attend (if any)? Are meetings optional?
- What kind of advance notice and preparation do you expect for meetings?
- How should the group determine the topics for a meeting?
- Given we want broad participation in our meetings, how will we achieve this?
- How will we summarize our meetings?
- How will we track and measure our progress between meetings?

Conversations 5 & 6.

Coaching for You and Other Conversations.

The group determines what you discuss here. If you've taken the time to get to know each person individually ([see Step A](#)), these conversations will be easier and you'll avoid unpleasant surprises.

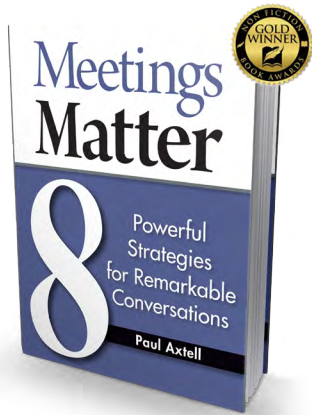
RESOURCES FOR ACHIEVING MEETING MASTERY



On the Web

Ask Paul: Paul Axtell's Blog

<http://paulaxtell.com/blog/>



Books

Paul Axtell,
“Meetings Matter: 8 Powerful Strategies for Remarkable Conversations” 2015

<http://paulaxtell.com/books/meetings-matter/>

Related Templates for Leaders

A Protocol for Clearing Questions and Responding to Complaints

<http://www.lucidmeetings.com/templates/paul-clearing-protocol>

Gathering Productive Feedback

<http://www.lucidmeetings.com/templates/rick-gathering-feedback>



All of Paul's Lucid Meetings Templates

<http://www.lucidmeetings.com/templates/designers/paul-axtell>

ABOUT THE AUTHOR

This template was designed by Paul Axtell.

Paul Axtell provides consulting and personal effectiveness training to a wide variety of clients, from Fortune 500 companies and universities to nonprofit organizations and government agencies. A large focus of his work is how to run effective and productive meetings—to turn them from dreaded calendar items into vital, productive sessions with measurable results.



He is the author of the Gold award-winning book *Meetings Matter: 8 Powerful Strategies for Remarkable Conversations*, *Being Remarkable*, and *Ten Powerful Things to Say to Your Kids: Creating the Relationship You Want with the Most Important People in Your Life*, which applies the concepts of his work to the special relationships between parents and children of all ages.

Learn more at PaulAxtell.com

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