

An aerial photograph of a university campus during autumn. The trees are in various shades of orange, yellow, and brown. A large, modern building with a glass facade is visible in the background, partially obscured by the trees. The sky is a clear, pale blue.

Coaching Your Team:

Accountability, Well-Being, and Communication

UBC Summer Knowledge Share 2026
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BUSINESS
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What is UBC?

University Business Consulting (UBC) is an internal George Mason University unit of trusted advisors focused on innovation, turning data into insights, and improving operational efficiencies, all in pursuit of the university's overarching strategic goals.

Using our **experience in higher education, project management, analytics, and strategic planning**, we work alongside our George Mason clients to devise solutions that **support them in reaching their goals** across the university.

UBC is located within the Office of the President.

<https://consulting.gmu.edu/>

How often do you feel that expectations, priorities, or demands are changing around you?

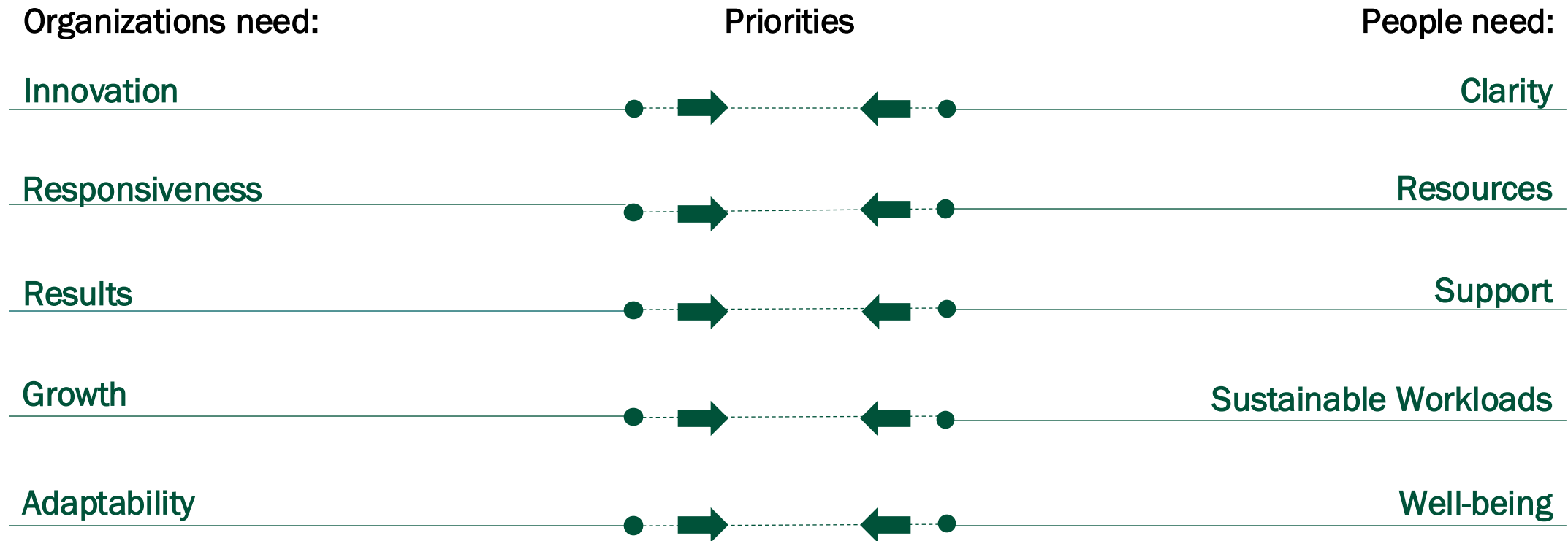
Higher Education is navigating an environment of continuous change.

- Adapt to evolving priorities
- Respond to changing student, stakeholder, and community needs
- Learn new systems and processes
- Manage increasing workloads
- Deliver high-quality outcomes with limited time and resources



The reality we face...

Performance and well-being feel like competing priorities.



TODAY'S PURPOSE:

Help everyone to feel supported through sustained change by creating clarity, accountability, and momentum without increasing burnout.

The goal is not to add more work.
The goal is to improve how we communicate, support one another, and create shared ownership during times of change.

Goals for Today's Session

- 1 | Create Clarity:** Apply communication and coaching frameworks that reduce ambiguity and create clarity during periods of change and uncertainty.
- 2 | Increase Accountability:** Define expectations, ownership, and follow-up mechanisms that increase accountability while supporting employee well-being.
- 3 | Support Sustainable Performance:** Assess team demands and available resources to identify opportunities for support, workload management, and sustainable performance.

What You'll Build Today

Today, you will begin building your personal Coaching Playbook grounded in **four areas**:



CLARITY

Understanding priorities, expectations, and success



OWNERSHIP

Identifying what is within our influence and taking responsibility for action



CAPACITY

Assessing resources, support, workload, and well-being



CONSISTENCY

Following through, tracking progress, and building trust over time

Level-Setting Definitions

What is a playbook?

Coaching Playbook

- A **Coaching Playbook** is a practical collection of tools and habits that help individuals create clarity, ownership, capacity, and consistency in their work and relationships.

What is leadership?

Leadership

- **Leadership** is not a specific title, position, or role. Mason defines leadership as a set of **assumptions**, **core values**, and **competencies** for individuals to consider in their own exploration and practice of leadership.

How This Session Works

During this session, you will have opportunities to **pause**, **reflect**, and **capture ideas** in your Coaching Playbook.

For each section, we will:

1. Explore a common challenge
2. Discuss practical solutions
3. Review tools or frameworks for real applications
4. Complete a short reflection or call-to-action activity

By the end of the session, **you will have identified practical actions** you can apply in your work over the next 30 days.

The image displays a stack of Coaching Playbook templates. The topmost template is titled "COACHING PLAYBOOK - TEMPLATE" and features several sections:

- Consistency**: Includes a "REFLECTION" section with the prompt "Where is momentum through beginning to..." and a "PAUSE AND ASSESS" section with the prompt "What is the overall challenge etc. that needs the attention?"
- Ownership**: Includes a "REFLECTION" section with the prompt "Where are expectations decision-making slowing progress?" and a "PAUSE AND ASSESS" section with the prompt "What is the overall challenge etc. that needs the attention?"
- Capacity**: Includes a "REFLECTION" section with the prompt "Where are demands available time, energy, support?" and a "PAUSE AND ASSESS" section with the prompt "What is the overall challenge etc. that needs the attention?"
- Clarity**: Includes a "REFLECTION" section with the prompt "What information, evidence, decision feels unclear?" and a "PAUSE AND ASSESS" section with the prompt "What is the overall challenge etc. that needs the attention?"

Below the main sections, there are three "TOOL/Framework" sections, each with a list of options and a "For today's session, we will..." prompt:

- Consistency**: Options include "Momentum Review", "Start-Stop-Continue", "Priority Reset", "Discussion", and "Too Much Challenge". Prompt: "For today's session, we will just do the 'START' in the framework."
- Ownership**: Options include "Ownership Agreement", "Decision Matrix", "Control-Influence-Concern Cycle", and "GROW Coaching Model". Prompt: "For today's session, we will just do the 'G' in the GROW framework."
- Capacity**: Options include "Weather Report", "Support", "Conversation Framework", and "Speaking-Up Framework". Prompt: "For today's session, identify where you would like to receive some support or need to provide support for your team."

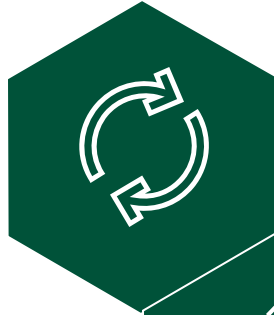
Section 1:

Clarity

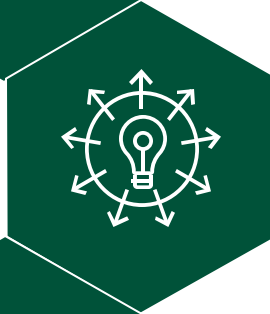
The Problem

We experience confusion, frustration, and disengagement when we don't know...

What is
changing?



Why is it
changing?



What is expected
of us?



What success
looks like?



Solution

IF-THEN approach. IF you see or feel signs that clarity is missing, THEN move from assumptions to shared understanding.

Signs that clarity is missing

Common questions people ask:

What is the priority right now?
Who owns this?
Has something changed?
What does success look like?
Why are we doing this?
How does this affect me?



Moving from assumptions
to shared understanding

CLARIFY:

Purpose
Priorities
Roles
Expectations
Measures of success

When to Use

Clarity is most important when organizations are **experiencing change**, but it is valuable in every workplace conversation and every team environment to drive **high performance** and **team engagement**.

Organizational Change

- New structures, processes, or systems
- Policy or procedures updates
- Shifts in strategy or direction
- Uncertainty about impacts and expectations

New Initiatives

- Launching projects or programs
- Introducing new responsibilities
- Establishing goals and timelines
- Defining success measures

Changes in Priority

- Competing demands emerge
- Resources shift
- Workload increases
- Teams are asked to adapt quickly

Section 1 Tools & Templates

Use the following tools and frameworks to communicate change, have effective conversations, and ensure clarity moving forward.

Tools	Use...
 4C's Framework	When communicating change.
 CLEAR Conversation	When you are trying to "manage up" and take initiative instead of waiting for direction.
 Communication Framework	To establish what happened and where you are going now.
 Clarity Framework	To establish the parameters of change for day-to-day activities.
 Structured 1:1 Agenda	To ensure a 1:1 meeting is fruitful and meets your and your employees' expectations.



Clarity Framework

What?

What processes, priorities, roles, or timelines are changing?

What is not?

What remains the same? What values, priorities, or commitments continue?

What do we know?

What decisions have been made? What information has been confirmed?

What is unknown?

What questions remain? When can we expect additional information?

When change happens, people don't expect leaders to know everything. Employees expect leaders to be clear about what is known, what is changing, and what remains uncertain.

What is it? The Clarity framework provides consistent, transparent updates that build trust and reduce speculation.

What Is Changing: Clearly identifies what employees should expect to be different moving forward.

What Is Not Changing: Reinforces stability and helps employees focus on what they can continue to rely on.

What Do We Know: Separates facts from assumptions, providing confidence in the information being shared.

What Is Unknown: Demonstrates transparency by acknowledging uncertainty while setting expectations for future updates.

Your Turn!

Think about a conversation, project, or responsibility that feels stuck or unclear.

Before the end of this week, document what project or projects in your team or department could use more clarity. Using the Clarity framework, think about whether you know:

- What is changing?
- What is not changing?
- What do we know?
- What is unknown?

Clarity can be created when we are honest in communicating what we do and do not know at this time.

COACHING PLAYBOOK - SUMMER KNOWLEDGE SHARE - SESSION 3	
Clarity Understanding priorities, expectations, and success	
TOOL/Framework ☐ 4 C's Framework ☐ CLEAR Conversation ☐ Communication Framework ☒ Clarity Framework ☐ Structured 1:1 ☐ Agenda	For today's session, we will <u>identify</u> the project or projects that require more clarity.
Ownership Identifying what is within our influence and taking responsibility for action	
TOOL/Framework ☐ Ownership Agreement ☐ Decision Matrix ☐ Control-Influence-Concern Cycle ☒ GROW Coaching Model	For today's session, we will just do the " <u>G</u> " in the GROW framework.
Capacity Assessing resources, support, workload, and well-being	
TOOL/Framework ☐ Weather Report ☒ Support Conversation Framework ☐ Speaking-Up Framework	For today's session, <u>identify</u> where would you like to receive some support or need to provide support for your team.
Consistency Following through, tracking progress, and building trust over time	
TOOL/Framework ☐ Momentum Review ☒ Start-Stop-Continue ☐ Priority Reset Discussion ☐ Too Much Challenge	For today's session, we will just do the " <u>START</u> " in the framework.

Section 2:

Ownership

The Challenge

When ownership is unclear, teams often experience:

Delayed
decisions



Missed follow-
through

Uneven
workloads



Repeated
conversations
about the same
issues

Solution

Ownership isn't about blame, pressure, or micromanagement. It's about creating clarity around who is **responsible**, who **makes decisions**, and what **happens next**.

1: Establish Responsibilities

Clarify ownership for outcomes, deliverables, and follow-through.

2: Establish Decision Making

Establish decision rights and when consultation or approval is needed.

3: Establish Follow Through

Create accountability through communication, progress reviews, and agreed-upon actions.

When You Use This

Ownership conversations are **most valuable when** responsibilities, decisions, or follow-through **are unclear**. The earlier expectations are clarified, the easier it is to maintain accountability and momentum.

New Projects and Initiatives

- Launching a new project and needing structure
- Establishing goals
- Clarifying expectations

Delays and Missed Commitments

- Deadlines are repeatedly missed
- Work is delayed because there is waiting for action
- Issues are discussed multiple times

Priorities are Unclear

- Decision authority is unclear
- Multiple people believe someone else owns it
- Competing priorities create confusion

Section 2 Tools & Frameworks

Use the following tools and frameworks to clarify responsibilities, strengthen accountability, and keep work moving forward.

Tools		Use When You Need To...
	Ownership Agreement	Create alignment and clarify expectations
	Decision Matrix	Determine who can decide, who should be consulted, and when escalation is needed
	Control-Influence-Concern Cycle	Focus effort on what you can own, influence, and take action on
	GROW Coaching Model	Coach yourself or others through challenges, decisions, and next steps





Tool Deep Dive: GROW Coaching Model

GOAL

- What do you want to achieve?
- What do you want?

WAY FORWARD

- Which choice will you make?
- Who will you talk to?



REALITY

- Where are you now?
- What is happening at the moment?

OPTIONS

- What options do you have?
- What could you do?

What is it? A problem-solving tool that helps individuals move from identifying a challenge to determining a path forward.

Goal: Define the desired outcome.

Reality: Understand the current situation.

Options: Explore potential solutions.

Way Forward: Commit to the specific actions.

Your Turn!

Think about a project or responsibility that has been delayed or difficult to move forward.

Before the end of this week, use the GROW Coaching Model to identify:

- **G** – What outcome are you trying to achieve?
- **R** – What is getting in the way today?
- **O** – What is one action or conversation that could help?
- **W** – After thinking about this, what is your first step?

Progress often begins when we stop focusing on the problem and start identifying the next step forward.

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Section 3:

Capacity

The Challenge

When demands outpace resources, concerns go unspoken and lead to:

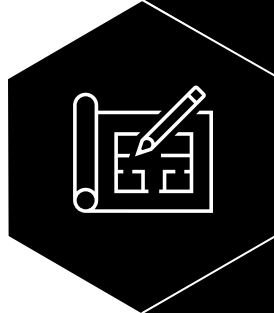
Unclear priorities



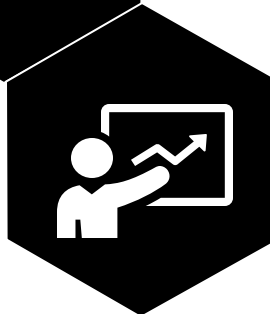
Increased stress



Decreased work
quality



Increased
burnout risk



Solution

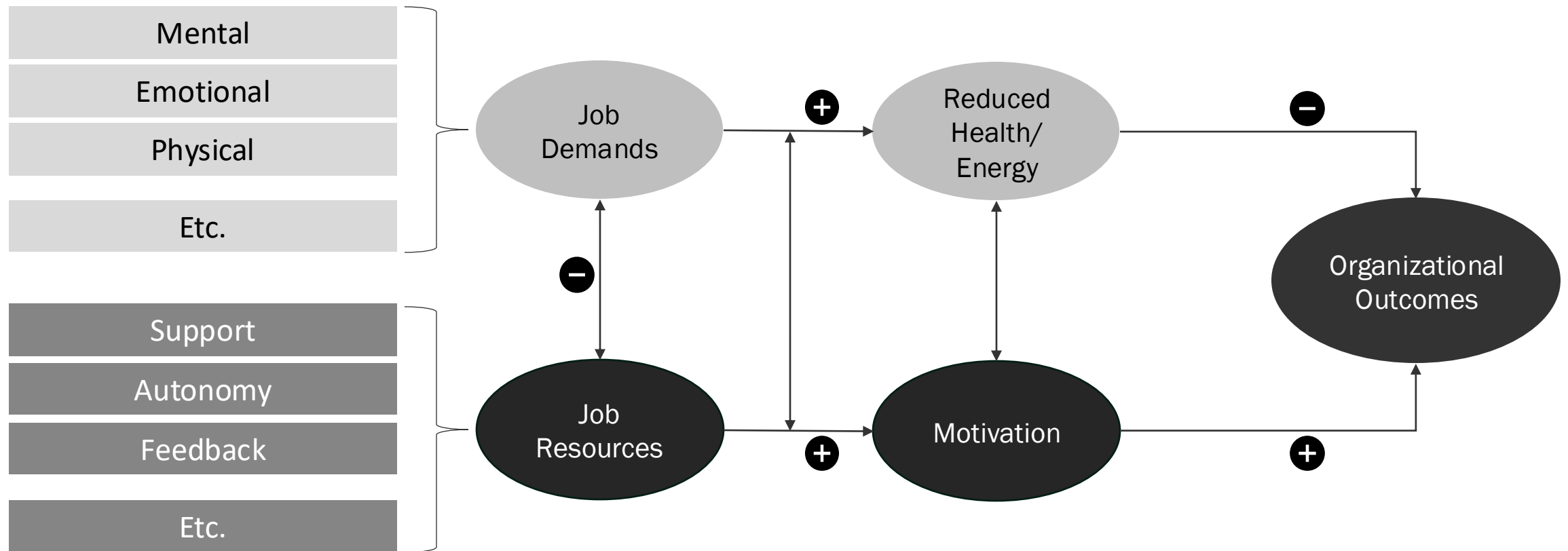
Capacity fosters the development of sustainable performance.



When one element is missing, performance becomes more difficult to sustain.

Job Demands-Resources (JD-R) Model

A workplace framework that explains how job demands cause stress and burnout, while job resources drive motivation and engagement.



When You Use This

Capacity conversations are most important when **demands are changing, resources are constrained, or people are showing signs of strain**. Waiting until you or someone on the team is overwhelmed often means opportunities for support have already been missed.

Change Fatigue is Emerging

- Multiple changes have occurred in a short period of time
- Employees are adapting to new systems, processes, or expectations
- Teams appear exhausted by continuous change

Workload Demands Increase

- New responsibilities are added
- Staffing changes occur
- Major projects or initiatives are introduced
- Competing priorities create pressure

Stress or Burnout Concerns Appear

- Employees seem disengaged or overwhelmed
- Work quality begins to decline
- Work-life boundaries become difficult to maintain
- People stop asking for help

Section 3 Tools & Templates

Use the following tools and frameworks to understand how you show up at work, how you ask or offer support, and when a discussion cannot wait.

Tools	Use ...
 Weather Report	To understand your own well-being and capacity to show up at work.
 Support Conversation Framework	When you are asking for or offering support.
 Speaking-Up Framework	When a conversation should not wait and a situation should be addressed as soon as possible.



Support Conversation Framework

Support is most effective when it is specific, timely, and collaborative.

Step	Employee	Supervisor
Situation	Here is what's happening...	Help me understand the situation.
Impact	Here is how it is affecting my work.	How is this impacting you, the team, or our goals?
Need	Here is the support or decision I need.	What would be most helpful right now?
Next Step	Here is what I will do next.	Here is what I will do to support you.

What is it? A support conversation is a shared framework for asking for and offering support, whether you are an employee requesting help or a leader responding to that request.

Situation: Establishes a shared understanding of the issue.

Impact: Connects the challenge to business outcomes rather than emotions alone.

Need: Encourages clear, actionable requests instead of assumption

Next Step: Ends with mutual accountability and agreed-upon actions.

George Mason Resources to Support Well-Being

Professional Development

Your Turn!

Think about the Job Demands-Resources model and identify how your own job demands and resources hinder or help you manage your work.

Before the end of this week, document what would help you manage your own work more effectively.

Think how one of the resources HR offers might help you in strengthening your resources.

We all need support – it is critical to communicate early and to recognize how you can support your employees.

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Section 4:

Consistency

The Challenge

Most leaders can start change – sustaining momentum is harder.



Solution

Consistency helps teams sustain progress by making **priorities visible**, **recognizing progress**, and creating **opportunities for reflection** and adjustment.



People are most motivated when they make meaningful progress in work that matters.

When You Use This

Consistency is most valuable when teams and leaders need to sustain momentum, reinforce priorities, and maintain focus over an extended period of time.

Change Initiatives

- New processes, systems, or ways of working are being implemented
- Teams need support and direction beyond the initial launch

Goals and Priorities

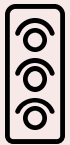
- Annual or strategic goals require sustained effort
- Teams need to stay focused on what matters most

Maintaining Momentum

- Early enthusiasm is beginning to fade
- Progress is difficult to see day-to-day
- Teams need opportunities to reflect and refocus

Section 4 Tools & Frameworks

Use the following tools and frameworks to recognize progress, refocus priorities, and sustain momentum over time.

Tools		Use When You Need To...
	Momentum Review	Assess progress, identify obstacles, and align around the most important next step
	Start-Stop-Continue	Improve performance through structured reflection and feedback
	Priority Reset Discussion	Decide what deserves attention, what can wait, and what should stop
	Too Much Challenge	Determine if demands are exceeding available capacity and support



Tool Deep Dive: Start Stop Continue

START

“What should I start doing?”

Think about:

- What opportunities are being missed?
- What things are not being done?
- Are there things worth trying?

STOP

“What should I stop doing?”

Think about:

- What things are not working or helping?
- What is creating unnecessary work?
- What adds effort but delivers little value?

CONTINUE

“What should I continue doing?”

Think about:

- What is working well?
- What should we preserve?
- What contributes to effectiveness?

What is it? A continuous improvement and reflection tool that helps individuals and groups identify practical actions for improving performance, reducing friction, and sustaining what is working well. It creates a structured way to discuss change without becoming overly focused on problems or criticism.

Start: Identify new behaviors, practices, or actions that would improve outcomes.

Stop: Identify activities, habits, or processes that create friction or no longer add value.

Continue: Identify practices that are working well and should be sustained.

Your Turn!

Think about a change, initiative, project, or goal that is important to you.

Using Start-Stop-Continue, identify:

- **Start** – What is one action, habit, or behavior that would improve progress moving forward?
- **Stop** – What is creating friction, confusion, or unnecessary effort that should be eliminated?
- **Continue** – What is currently working well and should be maintained?

Consistency is maintained by regularly improving what matters, reducing what doesn't, and reinforcing what already works.

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Wrap Up

How to move forward with your Playbook

Recap: Your Coaching Playbook

1

Clarity

You learned how to **provide or ask for clarity** when there is change and uncertainty.

- [4 C's Framework](#)
- [CLEAR Conversations](#)
- [Communications Framework](#)
- [Clarity Framework](#)
- [Structured 1:1 Agenda](#)

2

Ownership

You learned how to strengthen accountability through **decision-making and expectation setting**.

- [Ownership Agreement](#)
- [Decision Matrix](#)
- [Control-Influence-Concern Cycle](#)
- [GROW Framework](#)

3

Capacity

You learned about how to manage performance through **allocation of resources**.

- [Weather Report](#)
- [Support Conversation Framework](#)
- [Speaking Up Framework](#)

4

Consistency

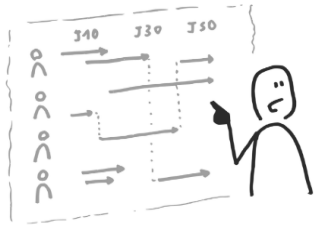
You learned about how to **follow through** and maintain communication throughout challenges.

- [Momentum Review](#)
- [Start, Stop, Continue](#)
- [Priority Reset Discussion](#)
- [Too Much Challenge](#)

Continue to iterate in all sections and use tools, such as AI, throughout the process

UBC 2026 Summer Series Recap

The summer 2026 series, **Winning this Season: Building Your Personal Playbook for Stewardship, Strategy, and Leadership in Uncertain Times**, positioned attendees as intentional and empowered stewards of resources, people, and change – balancing operational discipline (defense), strategic adaptation (offense), and human-centered leadership (coaching).



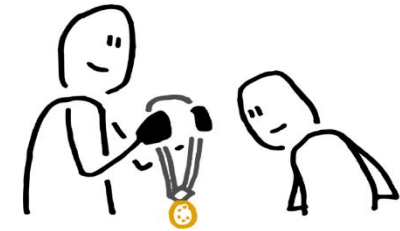
Defensive Fundamentals – Operating With Clarity in Constrained Times

Primary Focus: How units can stabilize operations and reduce friction when resources are constrained.



Offensive Moves – Adapting and Coordinating in a Complex Institution

Primary Focus: Helping faculty and staff collaborate effectively across units while aligning to institutional priorities and external shocks.



Coaching Your Team – Accountability, Well-Being, and Communication

Primary Focus: Equipping supervisors, project leads, and informal leaders to support people amid sustained change.



Have More Questions?



UBC now offers 30-minute office hour slots to any George Mason University faculty or staff interested in learning more about UBC's **service offerings** or to talk through a **current issue** you're facing.

This resource is helpful if you're unclear how UBC can help or if you just want to talk with a member of our team with no strings attached.

[Office hours sign-up link](#)

University Business Consulting

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All Tools & Templates – Table of Contents



Section 1: Clarity

- 4 C's Framework
- CLEAR Conversations
- Communications Framework
- Clarity Framework
- Structured 1:1 Agenda



Section 2: Ownership

- Ownership Agreement
- Decision Matrix
- Control-Influence-Concern Cycle
- GROW Framework



Section 3: Capacity

- Weather Report
- Support Conversation Framework
- Speaking Up Framework



Section 4: Consistency

- Momentum Review
- Start, Stop, Continue
- Priority Reset Discussion
- Too Much Challenge

Section 1 Tools & Templates

Tools	Use ...
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4 C's Framework

Context

- What is happening?
- What problem are we solving?

Current Reality

- What do we know?
- What don't we know yet?

Commitments

- What decisions are final?
- What remains flexible?

Connection

- How does this affect our team?
- What do you need from me?

“Leaders don't need all the answers but need a consistent way to communicate.”



What is it? The 4 C's is a simple framework for reducing uncertainty and building trust in times of change. Use it every time you provide a change update to help your team understand what is happening, what is known, and what comes next.

Context: Helps people understand the reason behind the change rather than filling in the gaps themselves.

Current Reality: Separates facts from assumptions and reduces unnecessary speculation.

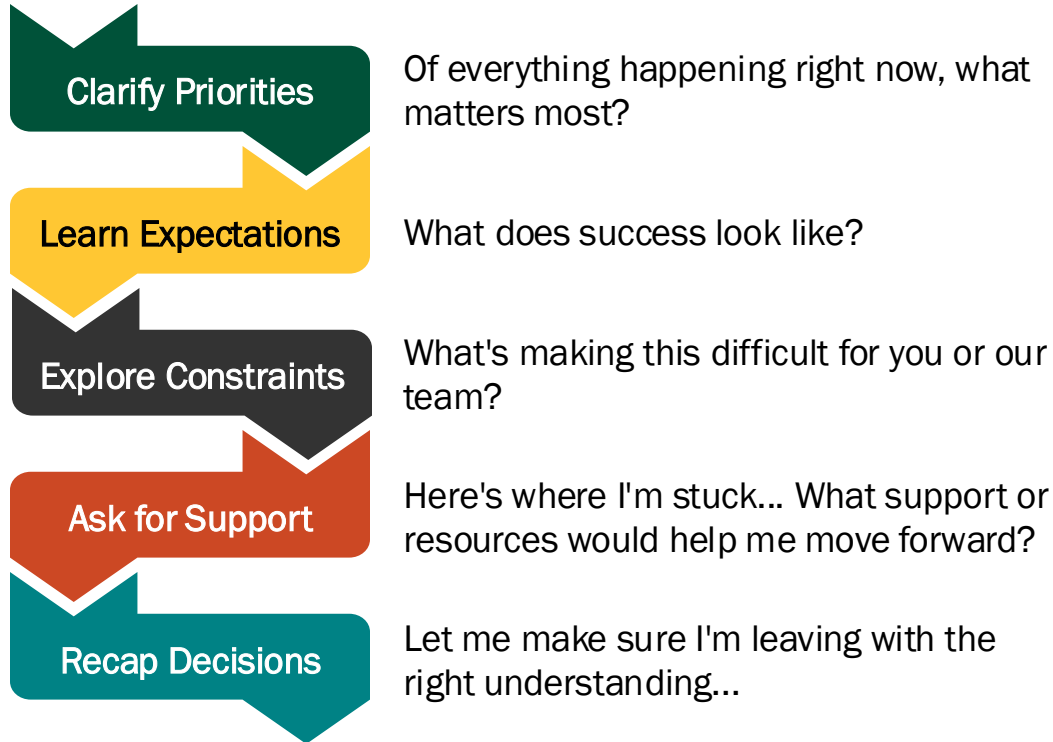
Commitments: Creates clarity by distinguishing what is decided from what is still evolving.

Connection: Makes the message personal, reinforces support, and encourages two-way dialogue.

Section 1 Tools & Templates

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CLEAR Conversations



“Managing up isn't about managing your manager”
but about taking ownership of communication to
improve alignment and outcomes.



What is it? The CLEAR conversation is a managing-up tool any employee can use to make 1:1s or check-ins more productive by focusing on what matters most.

Clarify Priorities: Aligns your efforts with the team's highest priorities and reduces competing demands.

Learn Expectations: Ensures you understand desired outcomes, timelines, and measures of success.

Explore Constraints: Builds awareness of obstacles, competing priorities, and opportunities to problem-solve together.

Ask for Support: Encourages proactive problem-solving instead of waiting until issues become barriers.

Recap Decisions: Confirms next steps, responsibilities, and expectations, reducing misunderstandings.

Section 1 Tools & Templates

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Communications Framework



What is it? The Communications framework allows you to create messages effectively whether you are leading a team, sharing an update, or following up after a meeting.

What Happened: Establishes the facts and creates a shared understanding of the current situation.

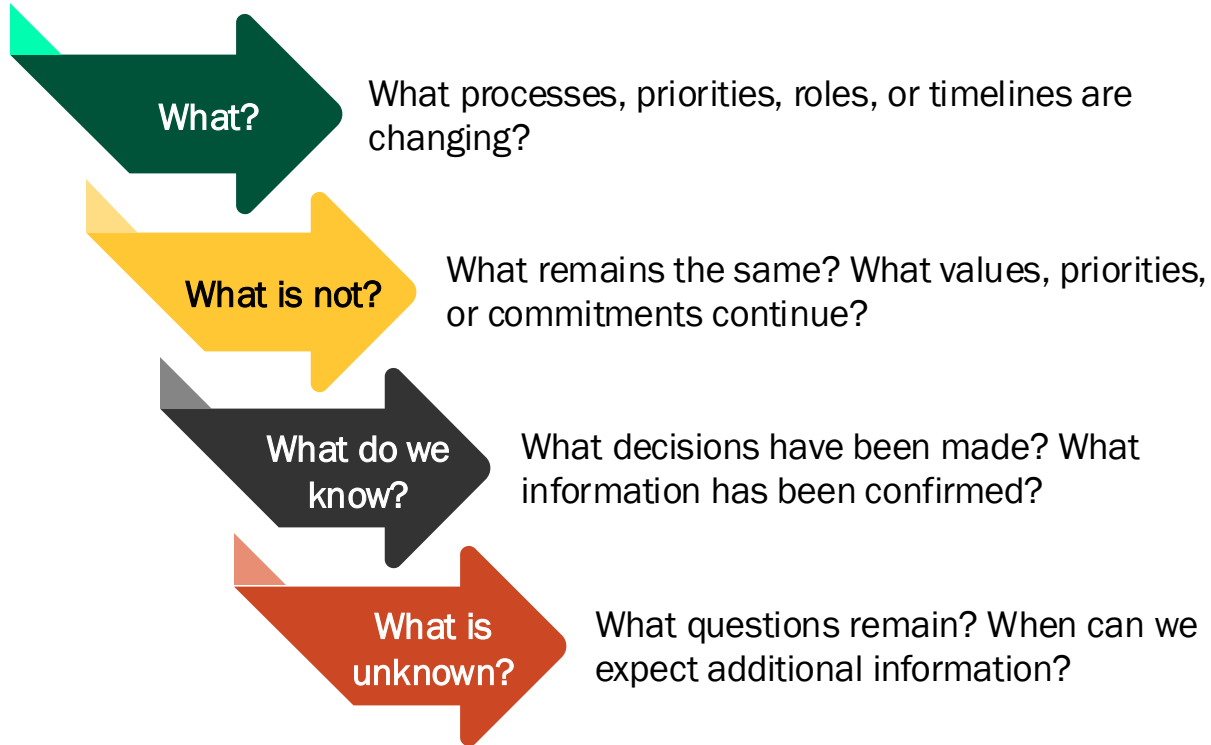
Why It Matters: Provides context so people understand the significance of the information and can connect it to their work.

What Happens Next: Creates alignment by defining next steps, responsibilities, and expectations moving forward.

Section 1 Tools & Templates

Tools	Use ...
 4C's Framework	When communicating change.
 CLEAR Conversation	When you are trying to "manage up" and take initiative instead of waiting for direction.
 Communication Framework	To establish what happened and where you are going now.
 Clarity Framework	To establish the parameters of change for day-to-day activities.
 Structured 1:1 Agenda	To ensure a 1:1 meeting is fruitful and meets your and your employees' expectations

Clarity Framework



“When change happens, people don't expect leaders to know everything. Employees expect leaders to be clear about what is known, what is changing, and what remains uncertain.”



What is it? The Clarity framework provides consistent, transparent updates that build trust and reduce speculation.

What Is Changing: Clearly identifies what employees should expect to be different moving forward.

What Is Not Changing: Reinforces stability and helps employees focus on what they can continue to rely on.

What Do We Know: Separates facts from assumptions, providing confidence in the information being shared.

What Is Unknown: Demonstrates transparency by acknowledging uncertainty while setting expectations for future updates.

Section 1 Tools & Templates

Tools	Use ...
 4C's Framework	When communicating change.
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 Structured 1:1 Agenda	To ensure a 1:1 meeting is fruitful and meets your and your employees' expectations

Structured 1:1 Agenda



What is it? An agenda is a simple tool that allows employees and managers to make every 1:1 intentional and actionable.

Well-Being: Creates an opportunity to discuss well-being and potential resource needs.

Wins: Highlights accomplishments, builds visibility, and provides context for ongoing work.

Priorities: Confirms alignment and ensures you're focused on the highest-value work.

Roadblocks: Identifies obstacles early so they can be addressed before they impact performance or timelines.

Development: Turns routine check-ins into opportunities for continuous learning and career growth.

“ Don't wait for your manager to drive the conversation. Bring an agenda that creates alignment, removes barriers, and supports your development. ”

Section 2 Tools & Templates

Tools	Use When You Need To...
 Ownership Agreement	Create alignment and clarify expectations
 Decision Matrix	Determine who can decide, who should be consulted, and when escalation is needed
 Control-Influence-Concern Cycle	Focus effort on what you can own, influence, and take action on
 GROW Coaching Model	Coach yourself or others through challenges, decisions, and next steps.

Ownership Agreement

Outcome

- What are we trying to accomplish?
- What does success look like?
- What should exist when this work is complete?

Decision Rights

- What can I decide independently?
- What requires consultation?
- What requires approval or escalation?

Resources

- What resources are available?
- What information, tools, or funding is needed?
- What barriers could affect progress?

Checkpoints

- When will we check in?
- What updates are expected?
- How will we identify issues early?

Success Measures

- How will we know the work was successful?
- What outcomes or milestones matter most?
- How will progress be measured?



What is it? An accountability and alignment tool that helps individuals and teams clarify expectations before work begins. It creates shared understanding around what success looks like, who owns decisions, what support is available, and how progress will be monitored.

Outcome: Defines the desired result or deliverable.

Decision Rights: Clarifies who can make which decisions.

Resources: Identifies the support needed for success.

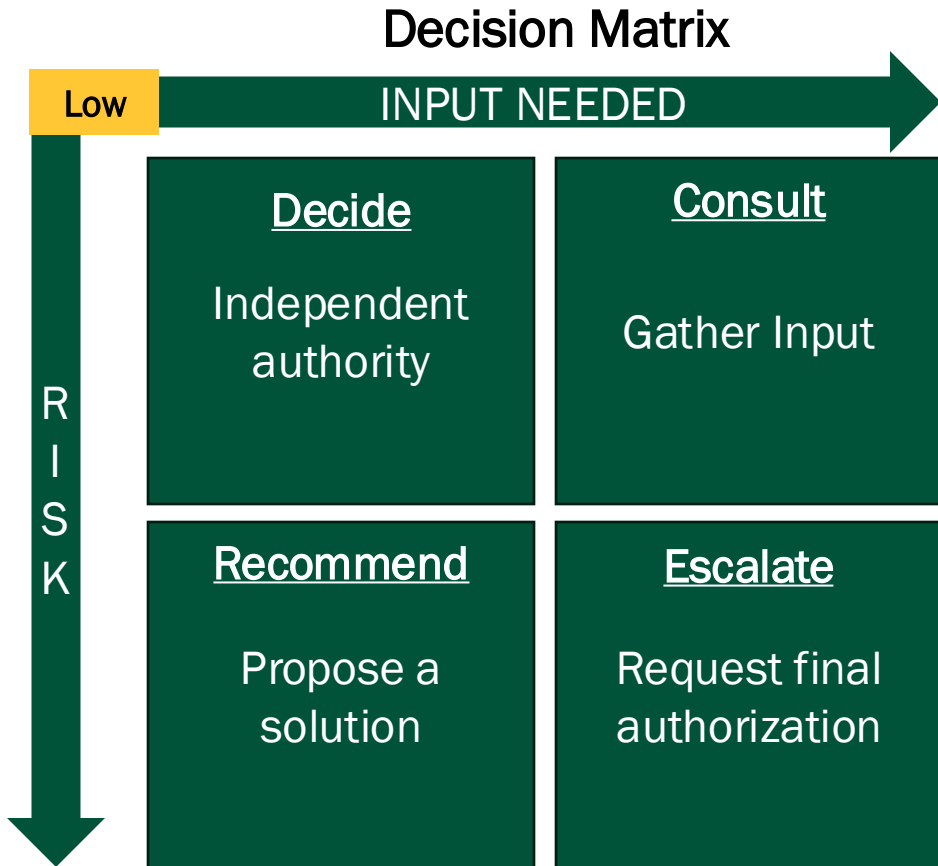
Checkpoints: Establishes how progress will be monitored.

Success Measures: Defines how success will be evaluated.

Section 2 Tools & Templates

Tools	Use When You Need To...
 Ownership Agreement	Create alignment and clarify expectations
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Decision Matrix



What is it? A decision tool that helps clarify who can make decisions, who should be consulted, and when approval is needed. It reduces confusion, prevents unnecessary escalation, and increases confidence by making decision authority visible.

Decide: Have the authority to make the decision independently.

Consult: Input is gathered from others before making a decision.

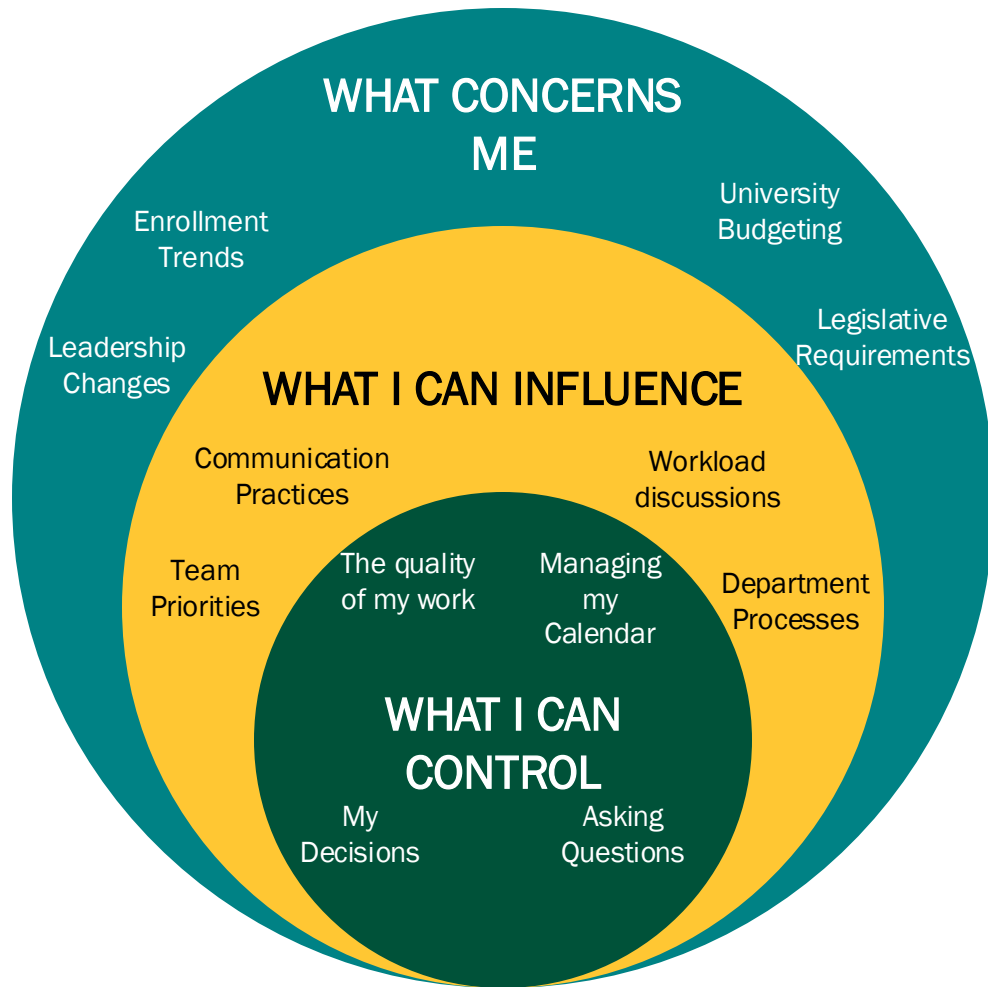
Recommend: Develops a proposed solution or course of action for consideration by a decision-maker.

Escalate: The decision requires formal approval or should be elevated to another individual or group.

Section 2 Tools & Templates

Tools	Use When You Need To...
 Ownership Agreement	Create alignment and clarify expectations
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Control-Influence-Concern Cycle



What is it? A prioritization and mindset tool that helps people focus their energy on areas where they can make the greatest impact. It is especially useful during periods of uncertainty, change, or stress when teams may spend significant time worrying about factors beyond their control.

Control: Things you directly control through your own actions, decisions, and behaviors.

Influence: Things you cannot directly control but can affect through relationships, communication, expertise, or collaboration.

Concern: Things that may matter to you but are largely outside your control or influence.

Section 2 Tools & Templates

Tools		Use When You Need To...
	Ownership Agreement	Create alignment and clarify expectations
	Decision Matrix	Determine who can decide, who should be consulted, and when escalation is needed
	Control-Influence-Concern Cycle	Focus effort on what you can own, influence, and take action on
	GROW Coaching Model	Coach yourself or others through challenges, decisions, and next steps.

GROW Coaching Model



What is it? A problem-solving tool that helps individuals move from identifying a challenge to determining a path forward.

Goal: Define the desired outcome.

Reality: Understand the current situation.

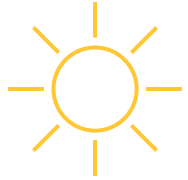
Options: Explore potential solutions.

Way Forward: Commit to the specific actions.

Section 3 Tools & Templates

Tools	Use ...
 Weather Report	Understanding your own well-being and capacity to show up at work.
 Support Conversation Framework	When you for asking for and offering support.
 Speaking-Up Framework	When a conversation should not wait and a situation should be addressed as soon as possible.

Weather Report – Self-Awareness



Am I providing clarity?
Am I approachable?



Am I distracted?
Am I unintentionally creating uncertainty?



Am I reacting instead of responding?
Is my stress becoming the team's stress?

“ Leaders set the emotional climate for their teams. ”



What is it? It is a tool that allows everyone to recognize how they show up at work. While we cannot control every circumstance, we can influence the environment and how we show up at work.

Ask yourself: **What weather am I bringing today?**

Calm & Clear: Creates psychological safety, confidence, and focus.

Cloudy: Mixed signals can leave teams guessing about priorities and expectations.

Stormy: Emotional reactivity can increase anxiety, reduce trust, and make it harder for teams to perform.

Section 3 Tools & Templates

Tools	Use ...
 Weather Report	Understanding your own well-being and capacity to show up at work.
 Support Conversation Framework	When you for asking for and offering support.
 Speaking-Up Framework	When a conversation should not wait and a situation should be addressed as soon as possible.

Support Conversation Framework

Step	Employee	Supervisor
Situation	Here is what's happening...	Help me understand the situation.
Impact	Here is how it is affecting my work.	How is this impacting you, the team, or our goals?
Need	Here is the support or decision I need.	What would be most helpful right now?
Next Step	Here is what I will do next.	Here is what I will do to support you.



What is it? A support conversation is a shared framework for asking for and offering support, whether you are an employee requesting help or a leader responding to that request.

Situation: Establishes a shared understanding of the issue.

Impact: Connects the challenge to business outcomes rather than emotions alone.

Need: Encourages clear, actionable requests instead of assumption

Next Step: Ends with mutual accountability and agreed-upon actions.

“Support is most effective when it is specific, timely, and collaborative.”

Section 3 Tools & Templates

Tools		Use ...
	Weather Report	Understanding your own well-being and capacity to show up at work.
	Support Conversation Framework	When you for asking for and offering support.
	Speaking-Up Framework	When a conversation should not wait and a situation should be addressed as soon as possible.

Speak-Up Framework

Safety is at risk

- Employee: Raise concerns about physical, emotional, or ethical risks.
- Supervisor: Listen without defensiveness and take appropriate action.

Competing priorities

- Employee: Communicate when demands conflict or capacity is limited.
- Supervisor: Help clarify priorities and remove barriers.

Unclear expectations

- Employee: Ask questions when instructions, roles, or success measures are uncertain.
- Supervisor: Provide clarity and confirm understanding.

A problem is growing

- Employee: Share concerns early rather than waiting for the issue to escalate.
- Supervisor: Create an environment where early problem-solving is encouraged.

Knowledge can improve outcomes

- Employee: Offer ideas or observations that may benefit the team.
- Supervisor: Invite input, acknowledge contributions, and consider different perspectives.



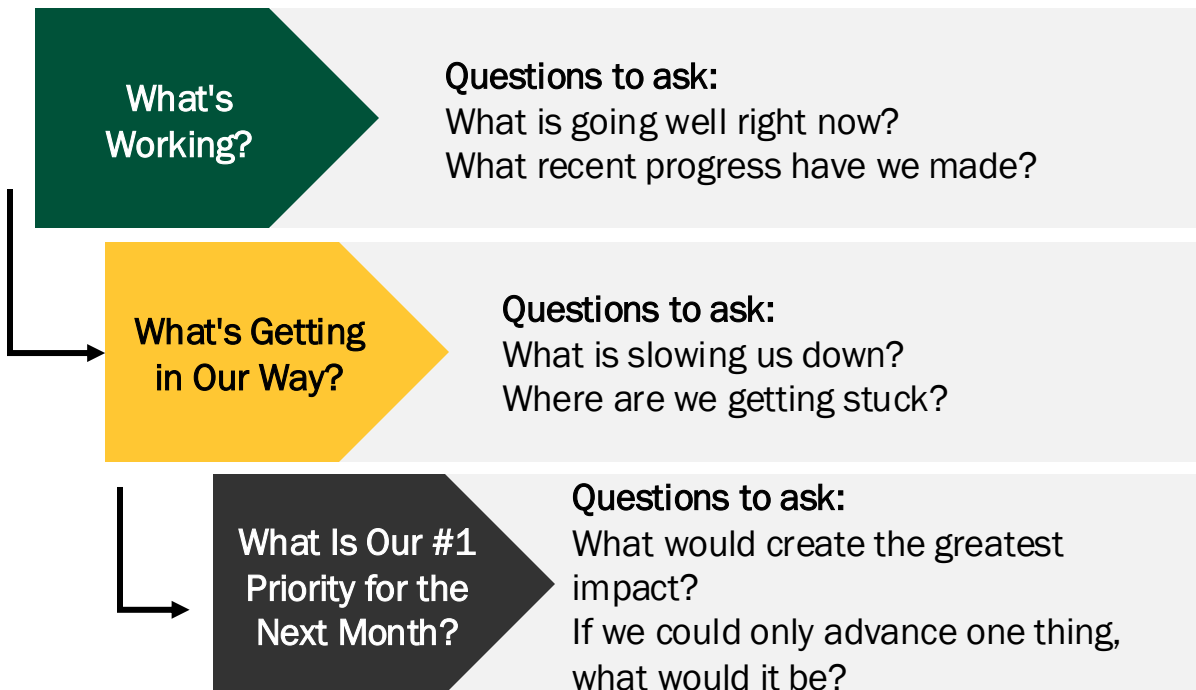
What is it? The the SPEAK-UP framework allows you to identify when when a conversation should not wait and a situation should be addressed as soon as possible.

Speaking up isn't about challenging authority, but rather it is about contributing to better decisions, stronger teamwork, and better outcomes.

Section 4 Tools & Templates

Tools	Use When You Need To...
 Momentum Review	Assess progress, identify obstacles, and align around the most important next step
 Start-Stop-Continue	Improve performance through structured reflection and feedback
 Priority Reset Discussion	Decide what deserves attention, what can wait, and what should stop
 Too Much Challenge	Determine if demands are exceeding available capacity and support

Momentum Review



What is it? A reflection and prioritization tool designed to help individuals and groups sustain progress during periods of change. It creates space to recognize progress, surface barriers, and realign around what matters most.

Unlike a status meeting, the focus is not on reporting activity. The focus is on maintaining momentum by identifying what is working, what is slowing progress, and where attention should be directed next.

Section 4 Tools & Templates

Tools	Use When You Need To...
 Momentum Review	Assess progress, identify obstacles, and align around the most important next step
 Start-Stop-Continue	Improve performance through structured reflection and feedback
 Priority Reset Discussion	Decide what deserves attention, what can wait, and what should stop
 Too Much Challenge	Determine if demands are exceeding available capacity and support

Start Stop Continue

START

“What should I start doing?”

Things to think about:

- What opportunities are being missed?
- What things are not being done?
- Are there things worth trying?

STOP

“What should I stop doing?”

Things to think about:

- What things are not working or helping?
- What is creating unnecessary work?
- What adds effort but delivers little value?

CONTINUE

“What should I continue doing?”

Things to think about:

- What is working well?
- What should we preserve?
- What contributes to effectiveness?



What is it? A continuous improvement and reflection tool that helps individuals and groups identify practical actions for improving performance, reducing friction, and sustaining what is working well. It creates a structured way to discuss change without becoming overly focused on problems or criticism.

Start: Identify new behaviors, practices, or actions that would improve outcomes.

Stop: Identify activities, habits, or processes that create friction or no longer add value.

Continue: Identify practices that are working well and should be sustained.

Section 4 Tools & Templates

Tools	Use When You Need To...
 Momentum Review	Assess progress, identify obstacles, and align around the most important next step
 Start-Stop-Continue	Improve performance through structured reflection and feedback
 Priority Reset Discussion	Decide what deserves attention, what can wait, and what should stop
 Too Much Challenge	Determine if demands are exceeding available capacity and support

Priority Reset Discussion

FOCUS

What Deserves
Attention?

Questions to ask:

- What matters most right now?
- What work has the greatest impact?

PAUSE

What Should Be
Paused?

Questions to ask:

- What can wait?
- What could be rescheduled without significant consequences?

REMOVE

What Should Be
Removed?

Questions to ask:

- What creates effort with limited benefit?
- What is creating unnecessary complexity?



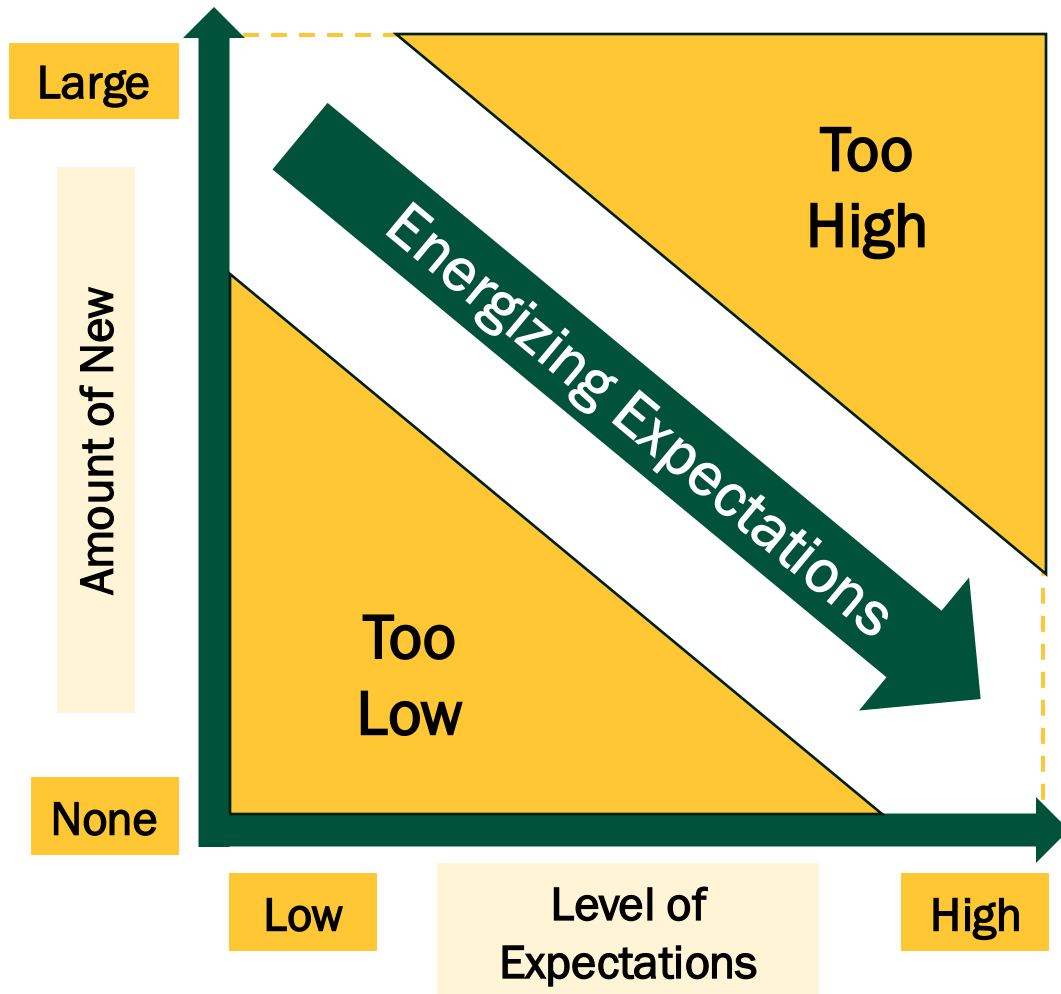
What is it? A structured conversation used to realign focus when capacity, priorities, or circumstances have changed. It helps individuals and groups acknowledge that not everything can be a priority at the same time and encourages intentional decisions about where to invest time and energy.

The goal: The goal is not to add more work. It is to determine what deserves attention, what should be delayed, and what should be stopped so that limited capacity is aligned with the most important objectives.

Section 4 Tools & Templates

Tools	Use When You Need To...
 Momentum Review	Assess progress, identify obstacles, and align around the most important next step
 Start-Stop-Continue	Improve performance through structured reflection and feedback
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Too Much Challenge



What is it? A framework is a workload and change-management reflection tool that helps individuals and groups recognize when expectations, demands, or change efforts have exceeded available capacity.

While challenge is often necessary for growth, too much challenge can create overwhelm, disengagement, decision fatigue, and burnout. This tool helps create conversations about balancing priorities, workload, and expectations before performance or well-being begins to suffer.