

Leading When There is No Roadmap: Reinvigorating Your Mission In Uncertain Times

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Empowering Leaders to reach their highest goals

Thank you for attending the webinar *Leading When There Is No Roadmap*. I hope that you're ready to reinvigorate your mission. Let's get started creating your new roadmap!

This handout contains some helpful discussion prompts that you can use to explore our "new normal" with your team and/or broader stakeholders and begin to create a roadmap to take you through these uncertain times.

As you apply the webinar concepts through these discussion exercises, I'm here to support you.

To schedule time to speak with me in a **FREE** personal virtual coaching session, go to the link below:

<https://bookme.name/JudyLubin/roadmap-coaching>

These sessions are complimentary. During our scheduled time, I can help you better understand the concepts by helping you to:

- prepare for discussion meetings with your team
- review discussions
- facilitate your discussions real-time (if you'd like me to facilitate, please also book a pre-facilitation session so we can get to know each other)



As helpful as these exercises will be, the most helpful thing you can do for your organization is to master the skill of thinking about your thinking so that navigating complexity is second nature to you. To do this, you'll need a long-term coaching engagement. Studies show that people who master these skills 1) have more satisfied and successful and 2) master bigger challenges with greater ease.

If you're interested in talking about a long-term coaching engagement, then use this link to schedule a Discovery Call to see if coaching is right for you! <https://bookme.name/JudyLubin/discovery-call>

Book Your FREE Coaching Today!

<https://bookme.name/JudyLubin/roadmap-coaching>

Questions? Email me at Judy@Stratoleader.com

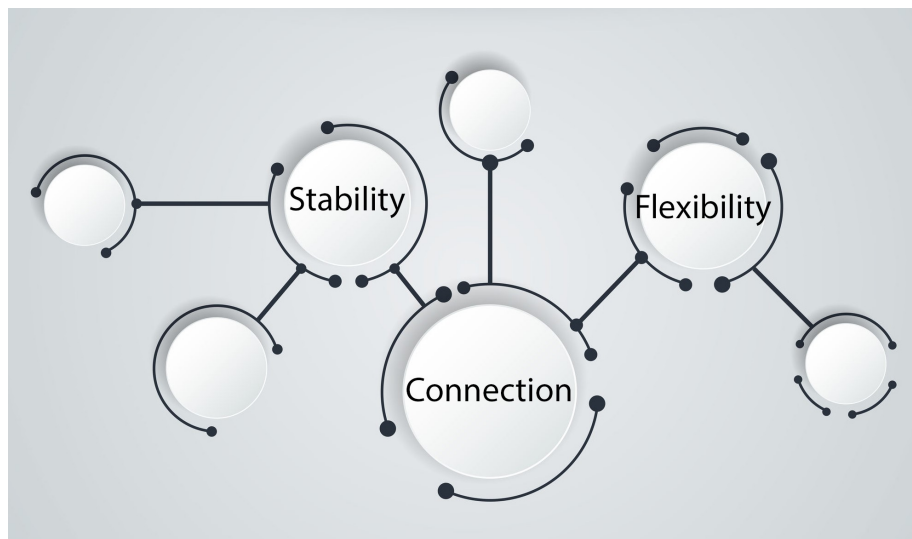
Getting Started: Where to begin the exploration

The first step in navigating uncertainty is to pause and explore the new system. It may seem counter-intuitive to slow down exactly when the change around you is happening the fastest. However, the slowdown is just a momentary pause and its necessary to help you find your bearings. In an uncertain world, racing frantically towards yesterday's solution is anti-helpful. Instead, we want to adhere to the old mantra: go slow to go fast. As soon as we have a working understanding of the new system, its time to jump in and get going.—but not until then!

Remember from the webinar that every system organizes around three principles: stability, flexibility and connection. Building a new roadmap for your response to this global change starts with reflecting on the system and on these three organizing principles and choosing how you want to implement these constructs in your new system. When we think about a system, we're primarily talking about your organization and its culture, strategy, actions, etc. But, remember, a person is also a system of thoughts, beliefs, habits, actions, etc. You could just as easily use this approach to guide your personal response as you could to guide your organizational response. With the exercises in this handout, you'll know more about the fundamental assumptions and principles that you want to characterize your response (your system) and can be more intentional about your new strategy going forward.

Use the roadmap in this handout to create a new roadmap that is:

- ◇ Anchored by your purpose
- ◇ Flexible in your thinking
- ◇ Connected through your actions



Getting Started: What is an Explore Meeting?

The discussion exercises in this handout are best done in the context of an Explore Meeting. Explore Meetings help you to explore a situation and learn more about the system encompassing a problem or tension. The goal of an Explore meeting is to surface new perspectives, understand the complexity of the current perspectives and begin to understand the context of the larger issues. The goal is NOT to leave the meeting with an answer, nor with a sense of consensus, nor with a unified perspective condensed from the many diverse perspectives. Save those goals for later. For now, focus on experiencing new and diverse perspectives, and learning about the new situation.

To make these meetings effective, include as many diverse perspectives as possible so you have a full understanding of the situation. This includes diversity of all types including age, race, gender, department, function, organization, role, etc. At a minimum, include the entire team of people for whom the question is relevant. If possible, include a wider group of different types of stakeholders. If necessary, in order to ensure everyone has a chance to speak freely, you might need to break a large group into smaller groups. If so, don't break the group by functions or departments – try to maintain broad diversity in each group.

The meetings are run with a special set of rules that facilitates perspective sharing. In short, participants should not provide solutions or suggestions and must instead listen to and accept all viewpoints with respect. More details are below.

Do's

- DO use these meetings to explore, understand and learn

- DO include as many divergent perspectives as possible. You can use several smaller meetings to keep things manageable.

- DO share the impact that the problem or tensions has on you or your group

- DO share what you think the impact of change might be on you or your group

- DO listen to and respect all other perspectives

- DO summarize the perspectives and share with those not at the meeting

- DO funnel your findings into a future solutions process

Don'ts

- DON'T talk about solutions – save these for later!

- DON'T search for one right answer or perspective

- DON'T assume you know other's people's minds

- DON'T end the meeting until everyone has had a chance to contribute

Roadmap Marker 1 – Stability

In this first exercise, we will be anchoring ourselves with our purpose, which is where our heart is!

Exercise —Why are we most essential? Exploring our purpose

The purpose of this exercise is to understand how you want to root yourself in the new system. Where do you want the center of stability to be in your new system? You want the new system to be rooted in the part of your purpose that best transfers to the new system. To find this, use the exploration exercise below. Remember to have this discussion in the context of an Explore Meeting with your whole team.

We are going to start by pushing ourselves to think in terms of superlatives, as in “the most”. We do this in order to focus our thoughts and discussion on essential issues and avoid discussion around less relevant topics. Then, we continue to re-ask the question of what is most important about the previous answer in order to take the discussion to deeper and deeper levels.

- Make a list of all the reasons that you are essential. Why does it matter that you continue to exist? What is relevant about the benefits that you provide to others? How are the benefits you provide valuable?
- From the list, choose the one captures the most important and most relevant reason that you must continue to exist.
- What matters most about your answer to the question above?
- Lets go at least one level deeper: What matters most about your answer to the question just prior?
- Repeat until you have an understanding of the part of your purpose matters most to you in this current situation
- In today’s world, how, where and by whom is this purpose most needed?

Example

As an example, here is how one science education non-profit answered these questions :

- What is the number 1 reason that we must continue to exist? **Answer: Because if we aren’t doing what we do, then who would?**
- Why would it most matter if no one else was doing what we do? **Answer: Because our kids wouldn’t be given enough opportunities for success if no one helped them.**
- What's the most important thing about giving our kids opportunities for success? **Answer: Because these kids deserve fair chances!**

Insight: We are serving our beneficiaries by providing social and economic justice. Our mission is providing STEM education, but our purpose is providing justice.

Roadmap Marker 2 – Flexibility

In these next exercises, we will be get moving where we most need to move right now—in our mind-set! When we experience broad change, our mental models break down. The urge to move that we are feeling is coming from the mental discomfort common with uncertainty. Because our discomfort is mental, we need to move our mind before we move into action!

A note on the polarity tool that we used in the webinar. We have only glimpsed a small fraction of the power of this tool. For a more expansive understanding of the power and use of polarity navigation tools, let's talk in one of my free coaching sessions. Or, see Brian Emerson and Kelly Lewis, *Navigating Polarities: Using Both/And Thinking to Lead Transformation* or Barry Johnson, *Polarity Management: Identifying and Managing Unsolvable Problems*.

Exercise 1 – Stability <—> Flexibility polarity

Use the attached stability <—> flexibility polarity graphic to structure a discussion (using an Explore Meeting) of your beliefs and assumptions about stability and flexibility in your organizational culture.

- Start by brainstorming the benefits of each pole. In your organization, what are the benefits of balanced, healthy use of each of the poles. What positive impacts does focusing on each pole have? How does focusing on each pole help you succeed? List as many items as you want. You don't have to capture every last benefit, but do make sure that you capture diverse perspectives. Strive to list the benefits of both poles in positive terms.
- Next consider the overuses of each pole. In your organization, what happens when you overuse each pole? What are the effects of focusing too intently on each pole and neglecting the "other" pole? As you consider overuses, recognize that overuses tend to be "opposites" of the benefits of the other pole because an over-use is related to using the opposite pole "too little".
- Are you in balance, or are you overusing one pole or the other? If you are overusing one pole, what is this costing you? What would change if you get these poles balanced?
- How do you need to think about these two poles in order to gain increased benefit from the lesser-used pole, while retaining the benefit from the more-used pole?
- How do you integrate stability and flexibility? What mindset helps you to see stability and flexibility as interdependent? Give a name for to this mindset to help you remember and apply it. How will you get yourself in the habit of using this mindset?
- Where do you most need stability?
- Where do you most need flexibility?
- What limiting beliefs about stability and flexibility have you uncovered?
- How will you address these and build new beliefs as an organization?

Roadmap Marker 2— Flexibility continued

Exercise 2 – Serving our mission <—> Fiscal strength Polarity

Every organization faces this polarity – do we emphasize the core service of our mission, or do we emphasize being fiscally responsible. We know that we need both, but how do we accomplish this? In these times, this polarity jumps to the forefront. The first step in finding the right balance is to explore our assumptions about these two poles.

Use the attached blank polarity graphic to structure a discussion (using an Explore Meeting) of your beliefs and assumptions about serving your mission and retaining fiscal strength in your organizational culture.

- Add the names to the boxes on each of the poles. If you wish to rename the polarity, go ahead. Just make sure that both of your pole names are neutral.
- Start by brainstorming the benefits of each pole. In your organization, what are the benefits of balanced, healthy use of each of the poles. What positive impacts does focusing on each pole have? How does focusing on each pole help you succeed? List as many items as you want. You don't have to capture every last benefit, but do make sure that you capture diverse perspectives. Strive to list the benefits of both poles in positive terms.
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- Where do you most need each pole?
- What limiting beliefs about these poles have you uncovered?
- How will you address these and build new beliefs as an organization?

Exercise 3 – Common polarities

Review the list of common polarities in Appendix 1 of this handout and look for any that seem to be important in your organization. For any that stand out for you, use the process and questions from the exercise above to examine your assumptions around that polarity. Discuss until you come to an understanding about the mindset needed to see the interdependence between the two poles.

Roadmap Marker 3 – Connection

Exercise 1—Both/And Thinking About Your System

Have an Explore Meeting with your team and any other relevant parties to help you understand your system and begin to build up ideas about how you can expand your assumptions about your system.

- How have your stakeholders been affected? What are they needing most right now? Where do their needs intersect with your purpose? Discuss this for each stakeholder type.
- Where are you seeing any of your stakeholders in only one capacity or role?
- Where could any of these groups step into a new role? Where is there room for you to expand your “both/and” thinking about your stakeholders?
- Where do you want to see stability in your relationships with stakeholders? What do you need to retain this stability?
- Where are there new openings for collaboration? For example, what are donors experiencing? Where might they be more willing to help and why?
- Where are there new ways to connect with these groups?
- How do these new ideas for connections help you to deepen your purpose?

Exercise 2—Creating the new system

Have another meeting, this time with a much broader group of stakeholders, to check your assumptions, bring in new perspectives and start re-connecting in new ways to your stakeholders. Include as many diverse types of stakeholders as can, including: staff, beneficiaries, competitors, collaborators, supporters, advocates, donors, volunteers, and other interested and knowledgeable players in the industry.

- Let each participant, and especially each type of stakeholder, share how have they been affected. What are they needing most right now?
- Let each participant, especially each type of stakeholder, share what they are most able and willing to offer. At this stage, don’t focus on how the offers match with what is needed. Instead, just share your strengths.
- Where is the group seeing symbiosis? Where can people help each other out?
- What would new partnerships and new roles look like?
- How will you follow up on the insights you gained from this discussion?

Appendix 1—Common Polarities

Below are some common polarities that are frequently encountered in organizations. As you review the list, look for any that might be trouble spots for your organization. When you find those, use the polarity tool to explore your assumptions and beliefs about that polarity.

Stability <—> Flexibility

Related to above:

Structure <—> Openness

Continuity <—> Change

Control <—> Freedom

Serving our mission <—> Fiscal strength

Reflection <—> Action

Grounded <—> Visionary

Planning <—> Implementation

Doing it myself <—> Getting help from others

Competition <—> Collaboration

Attention to myself and close circle <—> Attention to wider circles

Individualism <—> Community

Uniqueness <—> Connectedness

Focus on task <—> Focus on relationship

Focus on performance <—> Focus on person

Results <—> Process

Challenge <—> Support

Evaluation <—> Encouragement

Rational <—> Emotional

Focus on grants <—> Focus on donations

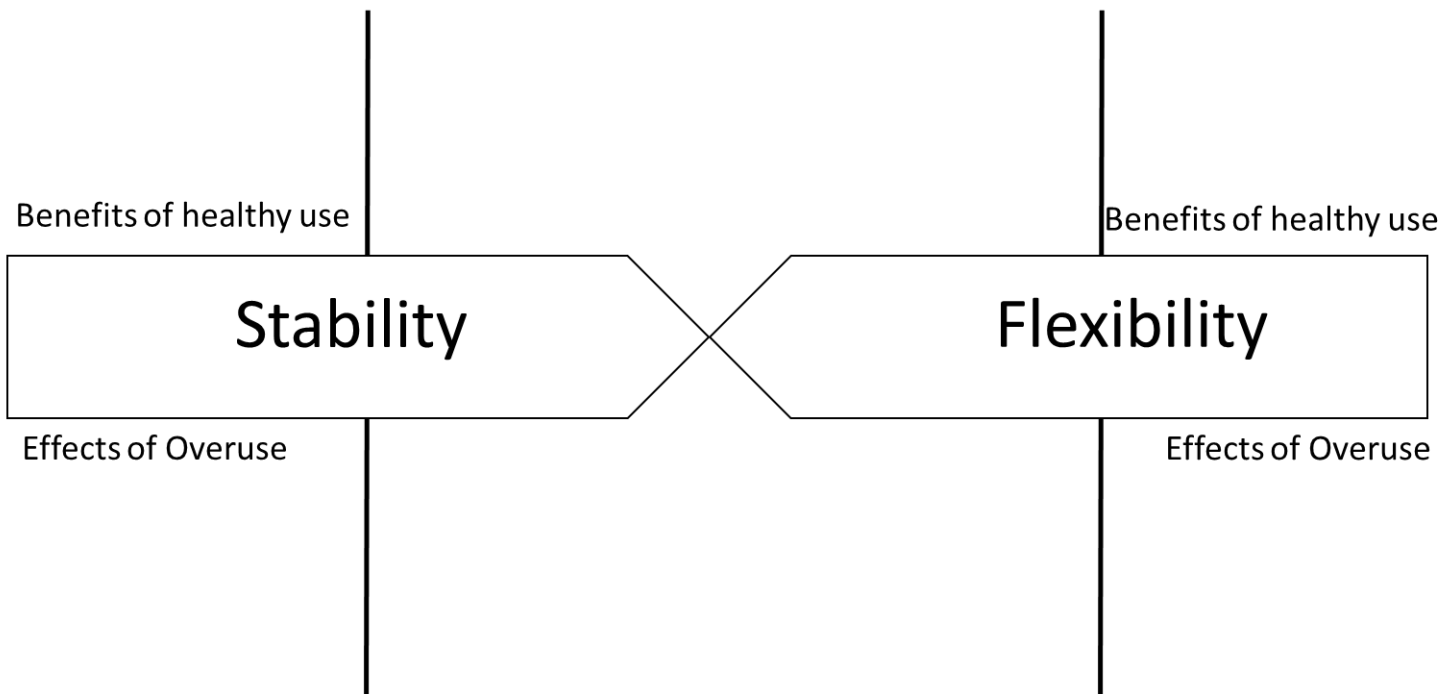
Focus on our core <—> Focus on innovation

Focus on cost <—> Focus on quality

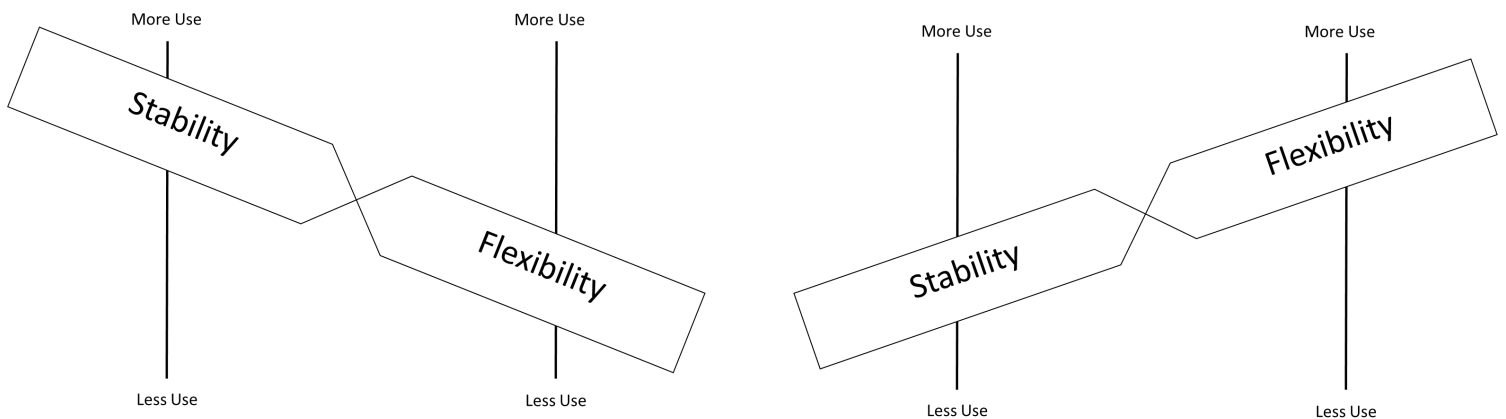
Local focus <—> Global focus

Appendix 2: Stability <—> Flexibility Polarity Graphic

Using the graphic below, make a list of the benefits of each pole. What do you see in your organization when you are using that pole in a healthy way? Write those benefits above the box for each pole. Next, make a list of the consequences of overusing each pole. What happens in your organization when you are using a pole in a way that is unbalanced so that you are also using the opposite pole too little? Write those below the box for each pole. (For better effect, re-draw this graphic onto a white board or other large display.)

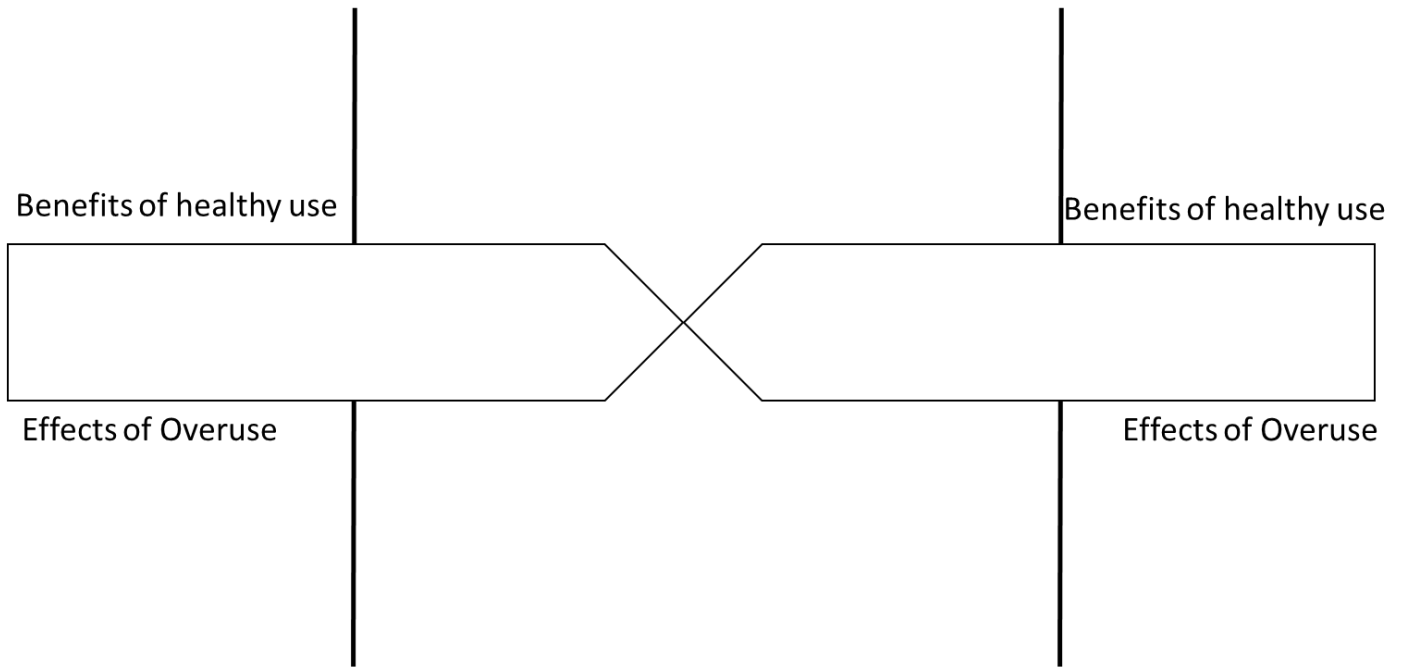


Are you overusing one of the poles? Do either of these resemble your organization? What mindset do you need to see the polarities through a “both/and” lens? How can you strengthen the underused pole without losing any benefits of the overused pole?



Appendix 3: Blank Polarity Graphic

Using the graphic below, add the names of the pole that you are investigating into the boxes. If you are using your own names, be sure to name each pole neutrally. Make a list of the benefits of each pole. What do you see in your organization when you are using that pole in a healthy way? Write those benefits above the box for each pole. Next, make a list of the consequences of overusing each pole. What happens in your organization when you are using a pole in a way that is unbalanced so that you are also using the opposite pole too little? Write those below the box for each pole. (For better effect, re-draw this graphic onto a white board or other large display.)



Are you overusing one of the poles? Do either of these resemble your organization? What mindset do you need to see the polarities through a “both/and” lens? How can you strengthen the underused pole without losing any benefits of the overused pole?

