

# You're Invited:

A Non-Fluffy, Straight-to-the-Point, Easy-to-Digest Perspective on Why Belonging is Best for Business

## Companion Workbook

*(this is a companion to the book; not a workbook for your companion)*

Kristen Bakalar

## Companion Workbook: Section 1

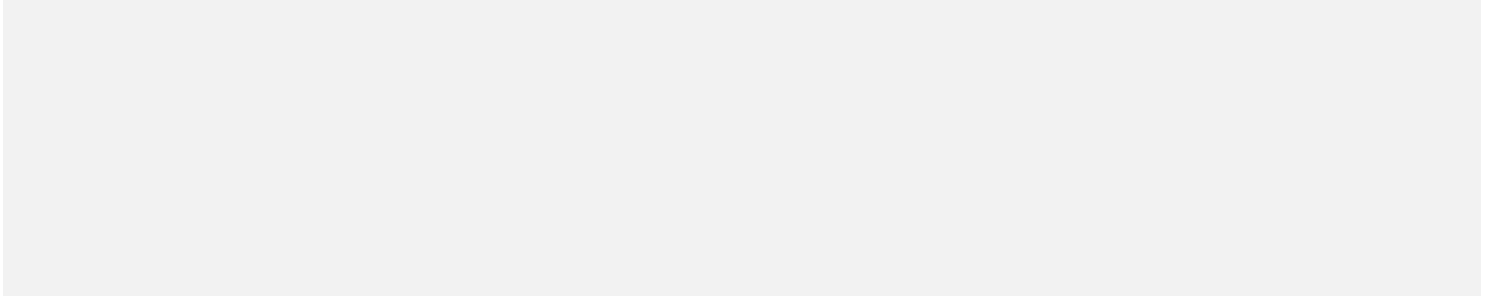
### ***Reactions & Reflections***



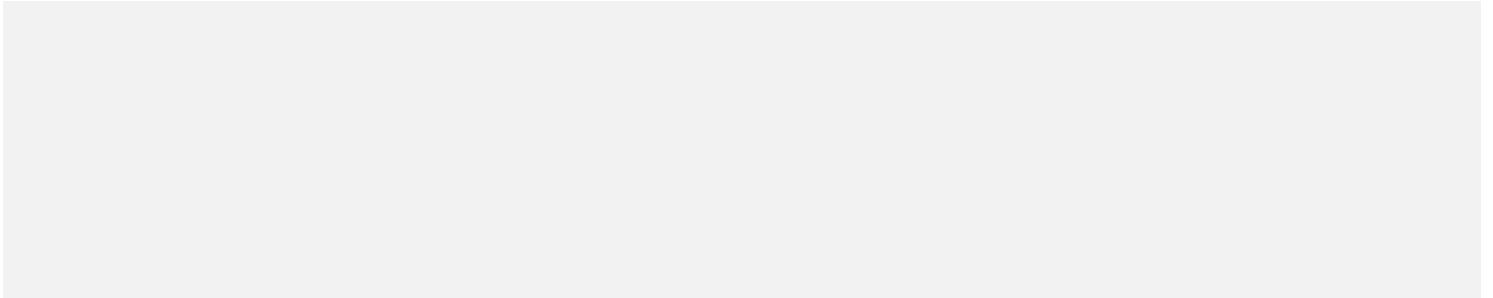
Use this space to write out any immediate or initial reactions you had after (or while) you read the book. You can use random words, full sentences, key phrases, pictures, doodles, sketches, or even calligraphy to capture your reflections. You do you.

A large, empty, light gray rectangular area intended for writing reflections.

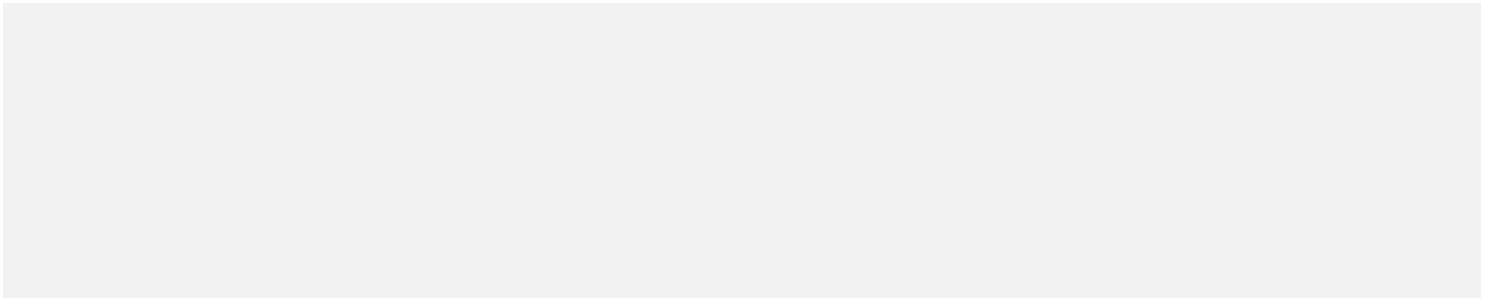
Which story stood out to you? Why?



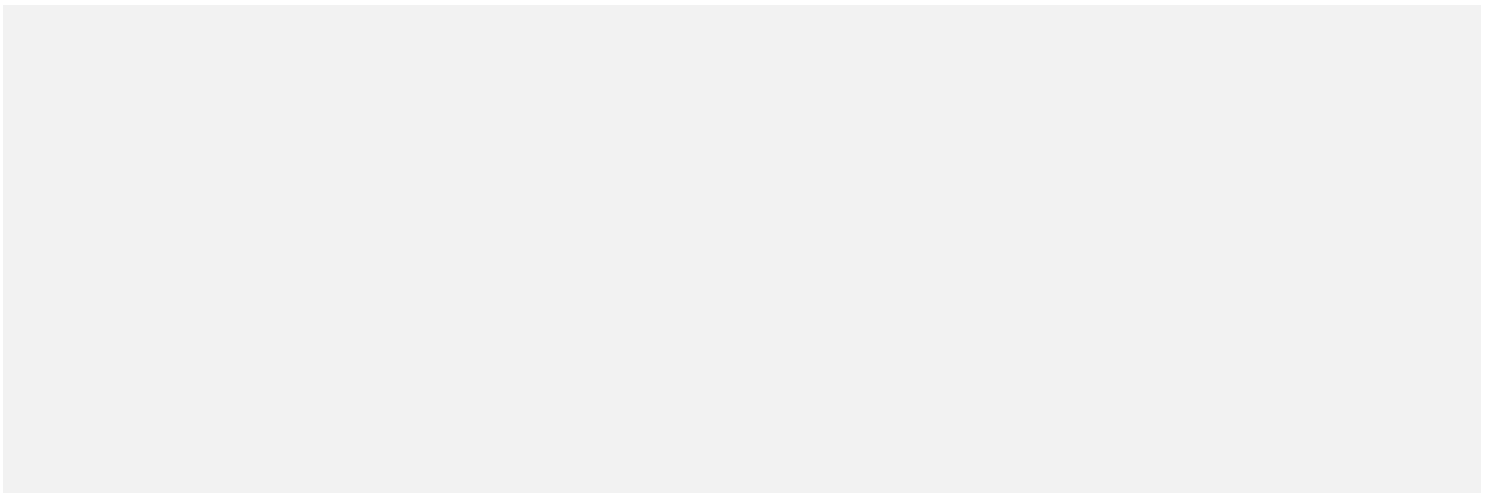
Which new approach ("out with the old, in with the new") seems most doable? Why?



What else did you find yourself wanting to learn more about or read more about? Was there something you were left wondering?



Can you use that curiosity to fuel an invitation to someone? To whom? Is there anything stopping you from extending that invitation? What?



## Companion Workbook: Section 2

### ***The Organization***



Think about the hiring process at your company. On a scale of 1-10 (1 is low), how would you rate the level of honesty in the process? Now rate the level of vulnerability.

Why did you rate them that way?

What would be different if the rating was 2-3 points higher? What would you see or feel?

What would "invitation" look like in the recruiting process at your company? Describe it.

**The following two pages pertain to your Talent Acquisition (TA) process.**

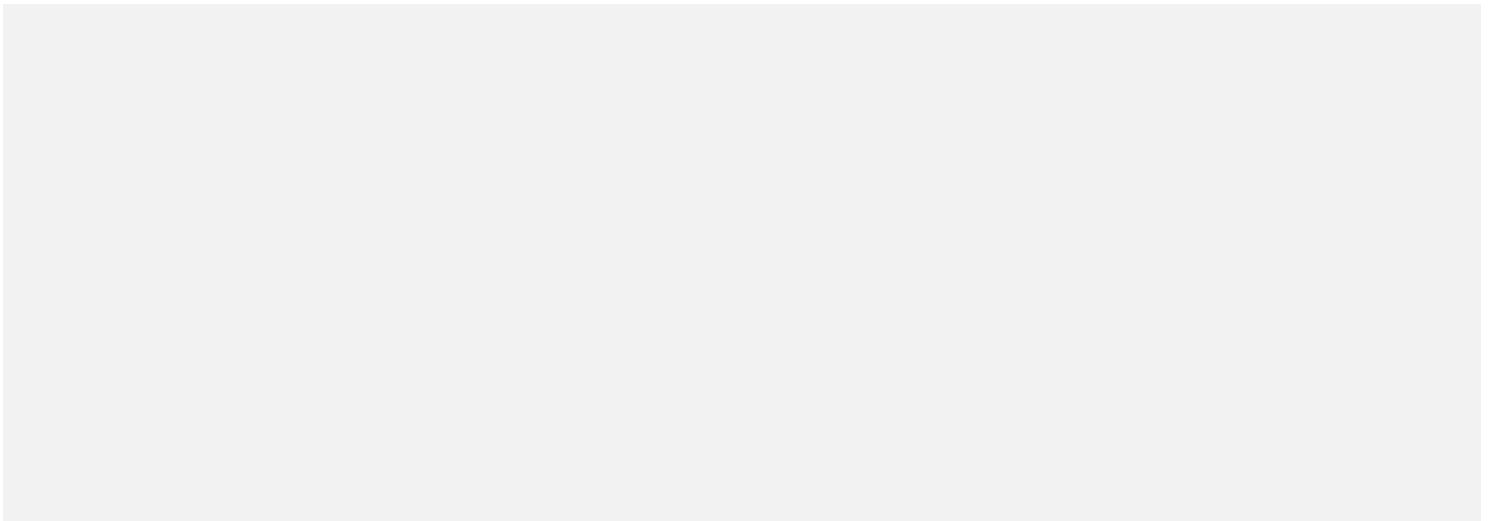
How is your TA team rewarded and/or recognized? (incentives, rewards, "spiffs," congratulatory efforts, etc.)

Do you reward "speed to hire" or measure how long a position sits vacant?

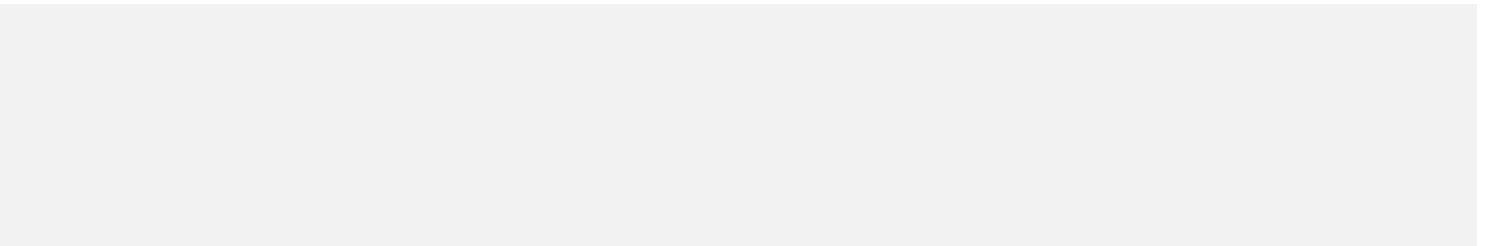
What other data or success measures are used in the TA process?

Do any of the incentives, rewards, motivations, intentions, or acknowledgments conflict or compete with each other? How so?

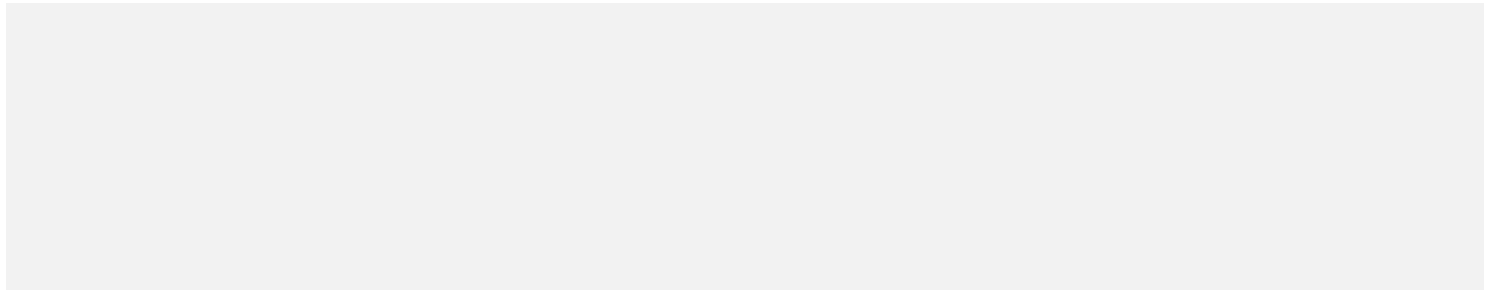
Write your nondiscrimination statement here.



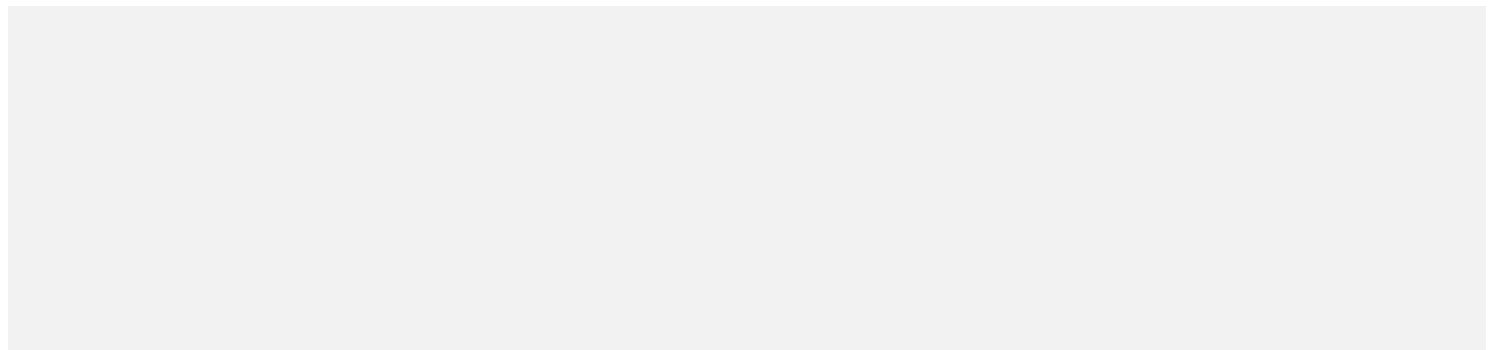
In writing it and re-reading it, what are your reactions? Do you like it? Do you think it says everything you want it to say?



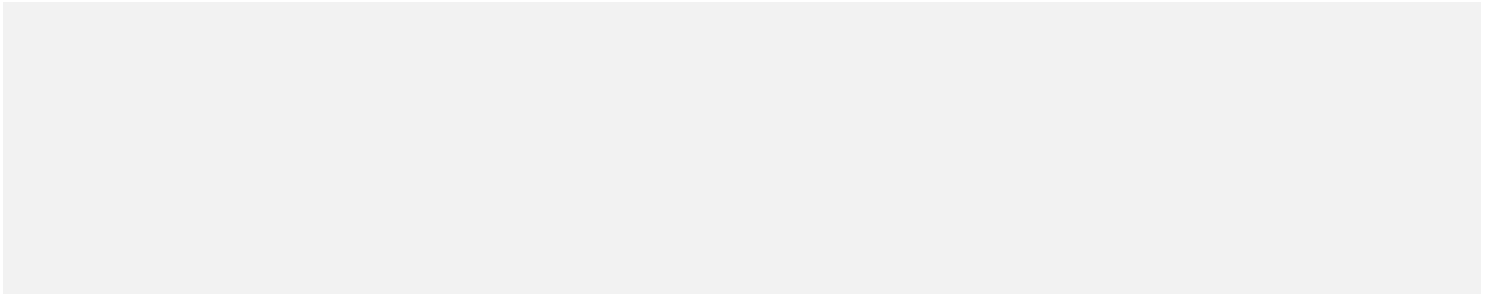
What do employees from marginalized groups think about it? Does it make them feel safe? Does it make them feel invited to the company?



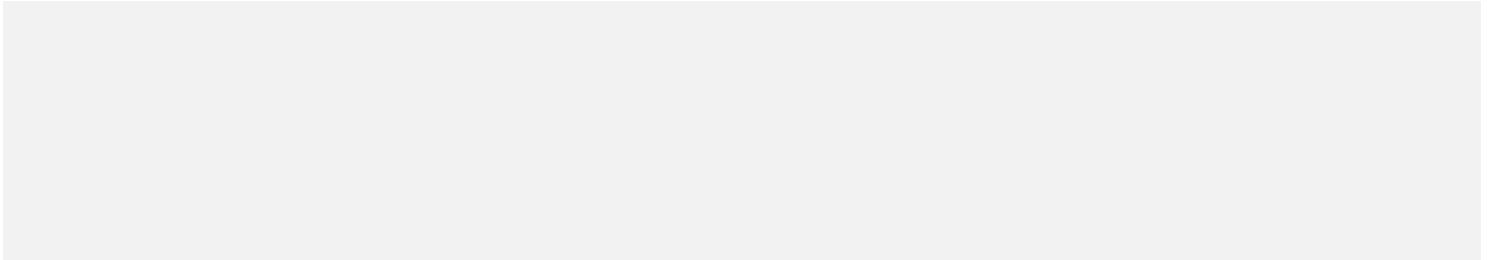
What is the profile of the employee you want to hire? Does this statement make them feel invited them to apply to the open roles?



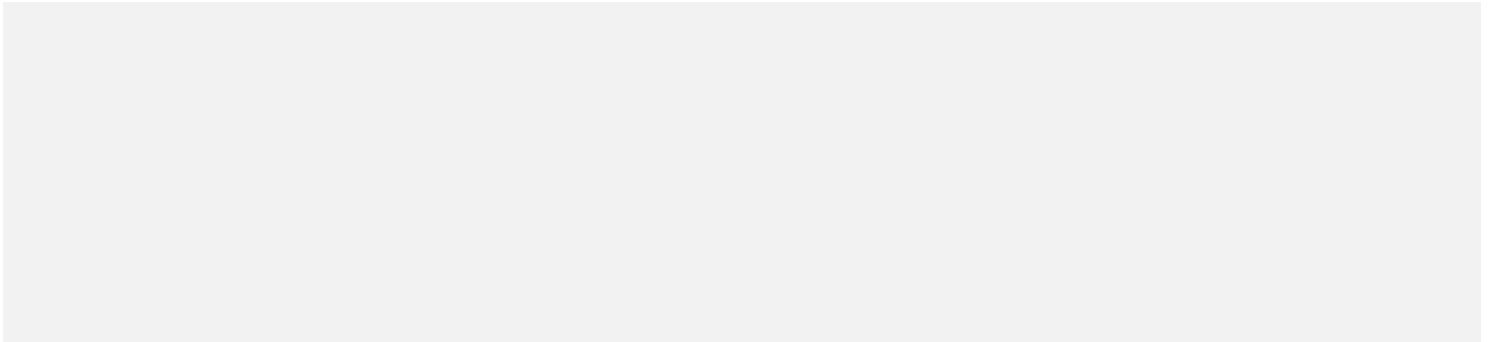
What events (meetings, parties, celebrations, etc.) are coming up at your company?



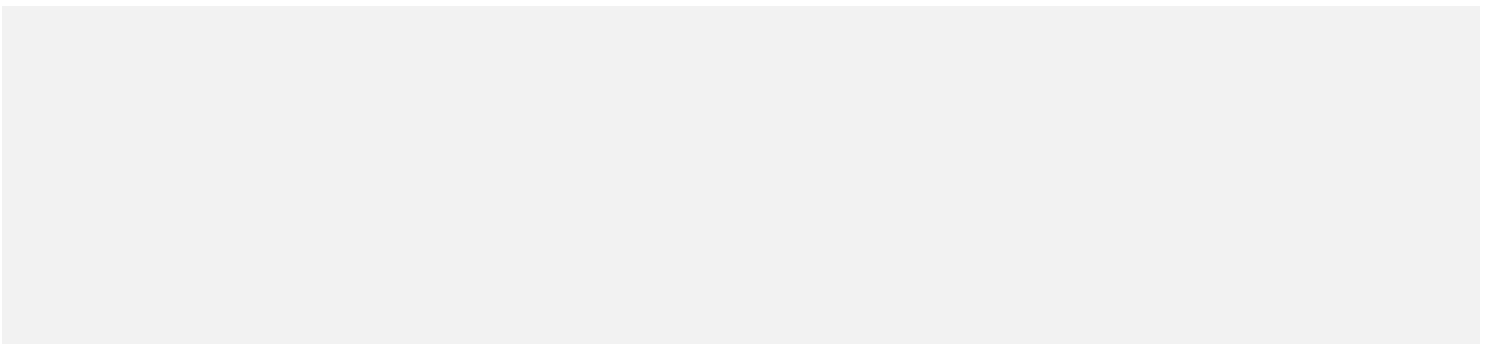
Thinking about those events, how could an invitation increase the number of people who show up?



Thinking about those events, how could an invitation change the **way** people show up (i.e. more engaged, more ideas, more excitement, etc.)?



Thinking about those events, how could an invitation alter the essence of the event, in general (for example, shifting from a meeting to deliver a message to a meeting to solicit ideas)?



What major changes are happening right now (i.e. new systems, mergers, change of leadership, etc.)?

Of the following approaches to invitation that could aid in a major company change, which resonates most?

- |  |  |
|--|--|
| <input type="checkbox"/> <i>Employee Surveys</i>             | <input type="checkbox"/> <i>Frequent "all-hands" meetings or similar</i>   |
| <input type="checkbox"/> <i>Focus Groups</i>                 | <input type="checkbox"/> <i>Electronic feedback system</i>                 |
| <input type="checkbox"/> <i>Forming a "workers' council"</i> | <input type="checkbox"/> <i>Real – or proverbial – suggestion box</i>      |
| <input type="checkbox"/> <i>Other</i>                        | <div style="background-color: #f0f0f0; height: 30px; width: 700px;"></div> |

Why?

What benefit(s) would inviting employees to participate in the change effort(s) have?

What would make inviting employees to the change effort(s) challenging?



## Companion Workbook: Section 3

### ***The Individuals***



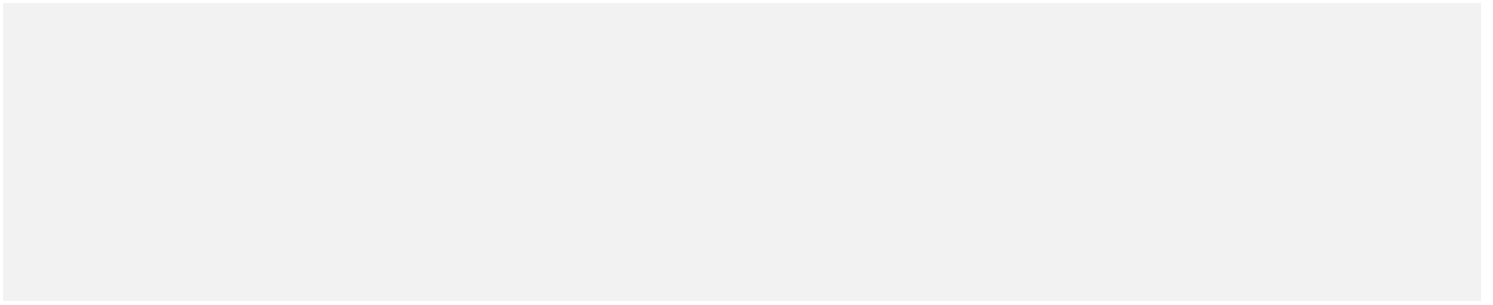
Of the people with whom you work, who is the most different from you?

In what ways is this person different from you?

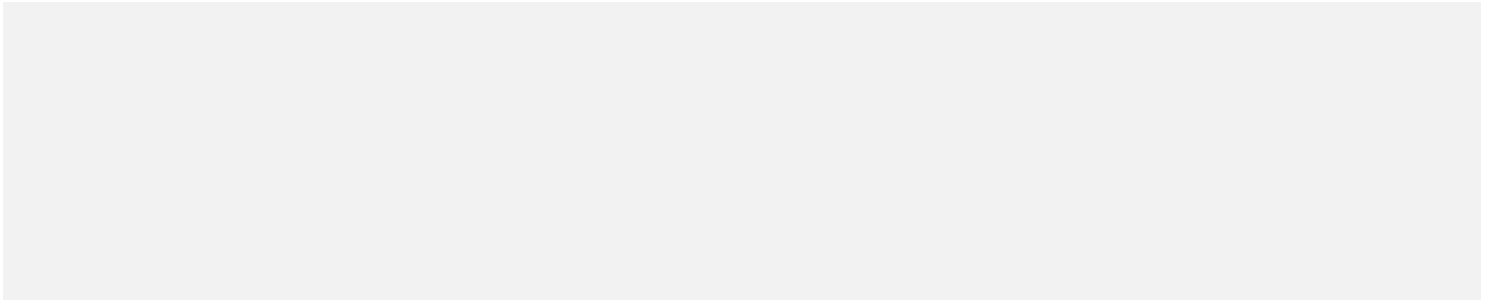
In what ways is this person different from you?

When thinking about the ways in which you two are different from each other, what aspects of this person intrigue you? For example, their beliefs, their background, their upbringing, their ideas...

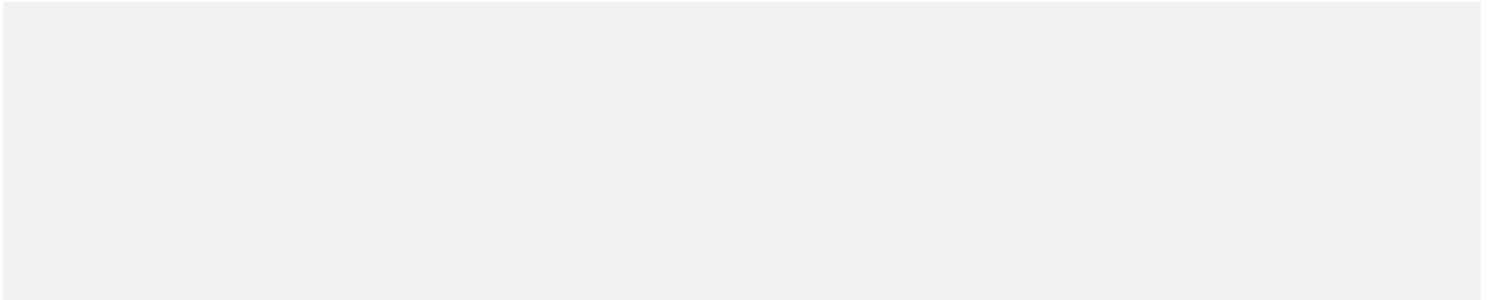
When thinking of your relationship with this person, what are you curious about?



When thinking of your relationship with this person, what are you **certain** about?

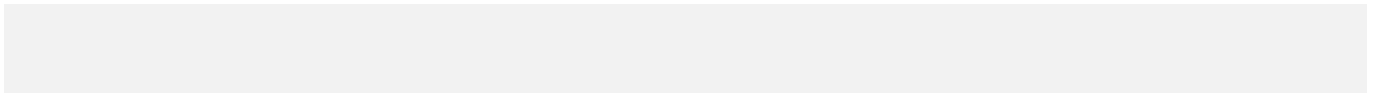


If you *had* to pick something, what opportunity exists for you to suspend your certainty and embrace some curiosity? Put another way: is there one thing that you think you're certain about, but upon reflection, you could be wrong?

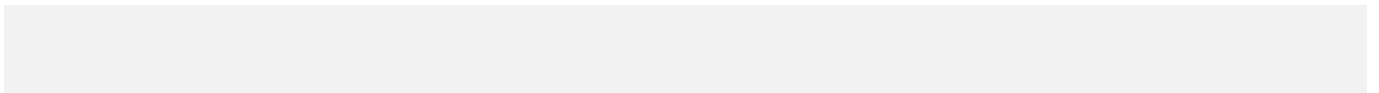


List 5 questions below that you could ask this person.

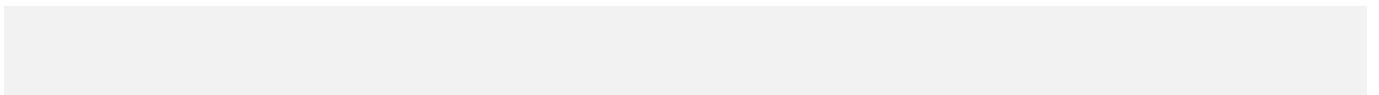
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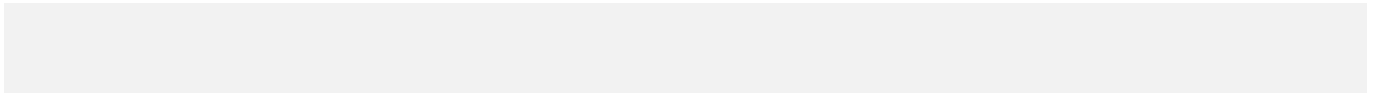
2.



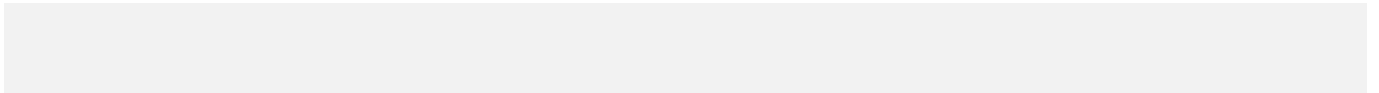
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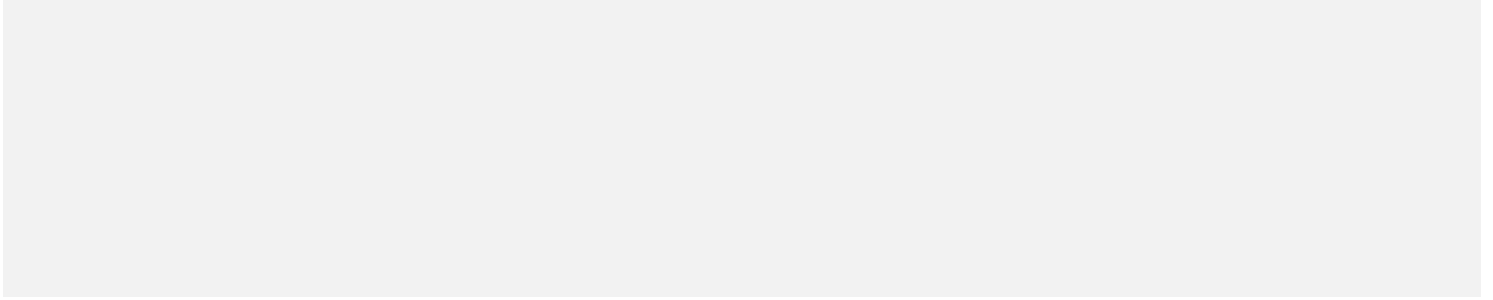
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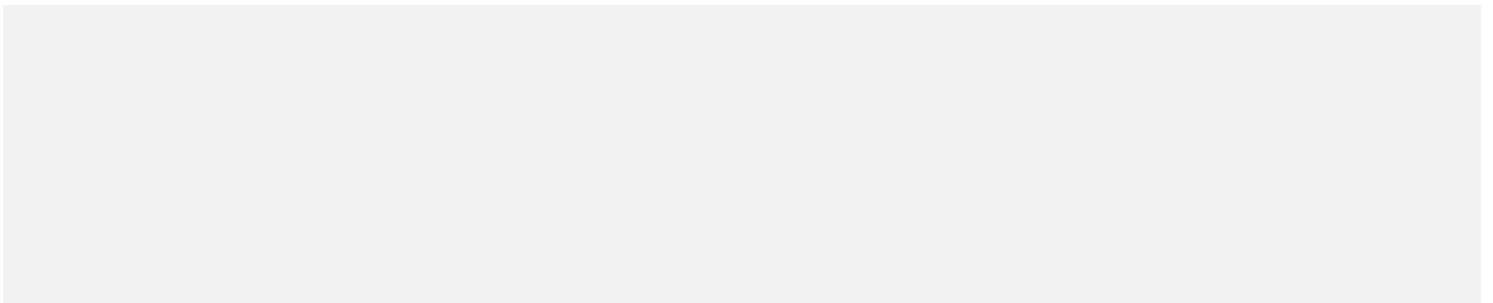
5.



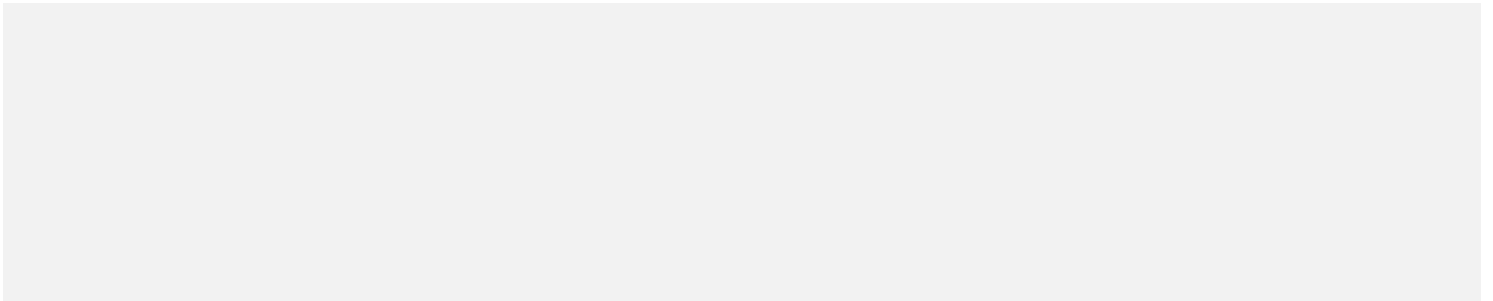
Who do you know that is going through something challenging right now (divorce, troubled child, death, aging parents, hard boss, etc.)?



While you might lean towards “giving them space,” the reality is that they need some support. How can you invite that person to share more about their experience? What might you say? (skip to the end of this workbook if you want some examples)

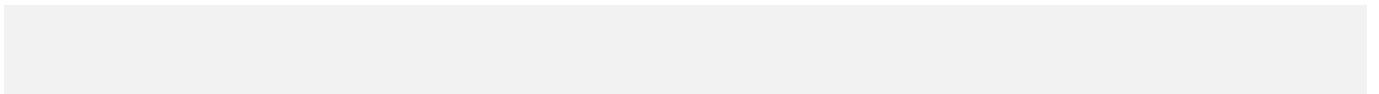


What fears or hesitations do you have about engaging this person on such a challenging topic?

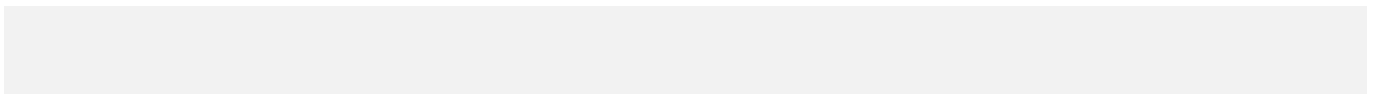


List three questions you can ask this person to start the conversation.

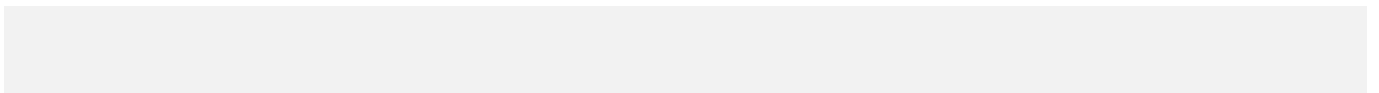
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## Companion Workbook: Section 4

### **The Team**

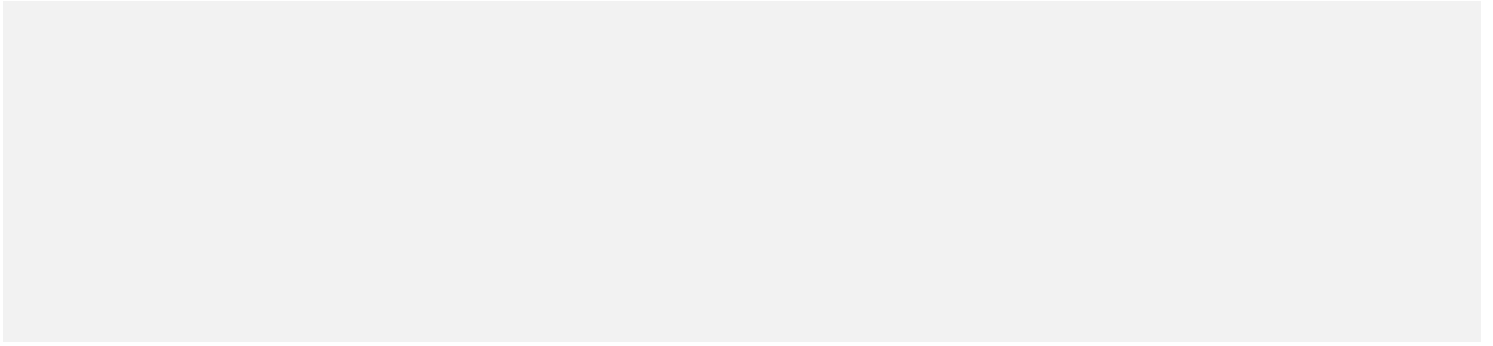


What is the current process for addressing an employee's poor performance?

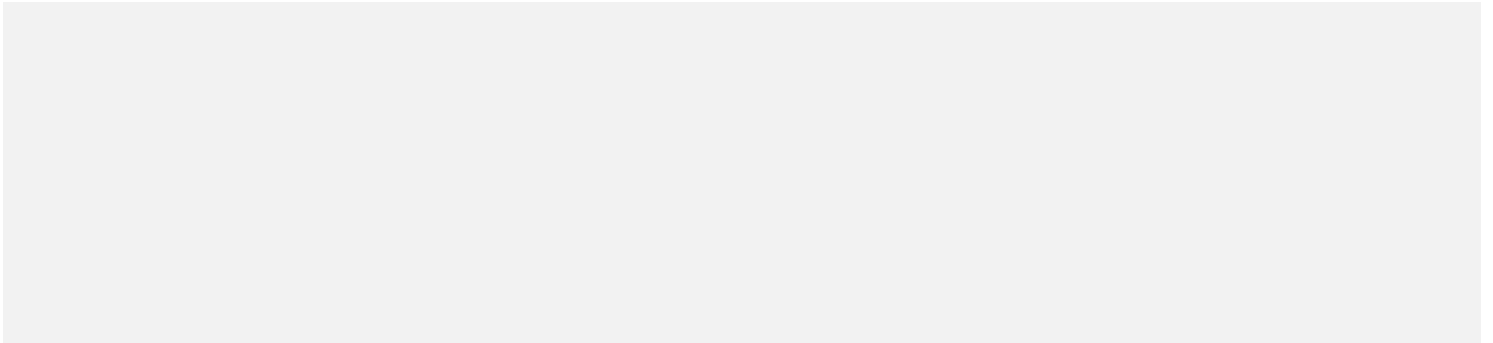
What is the current process for letting someone go?

What do you **wish** would be the process or approach you could take with poorly performing employees?

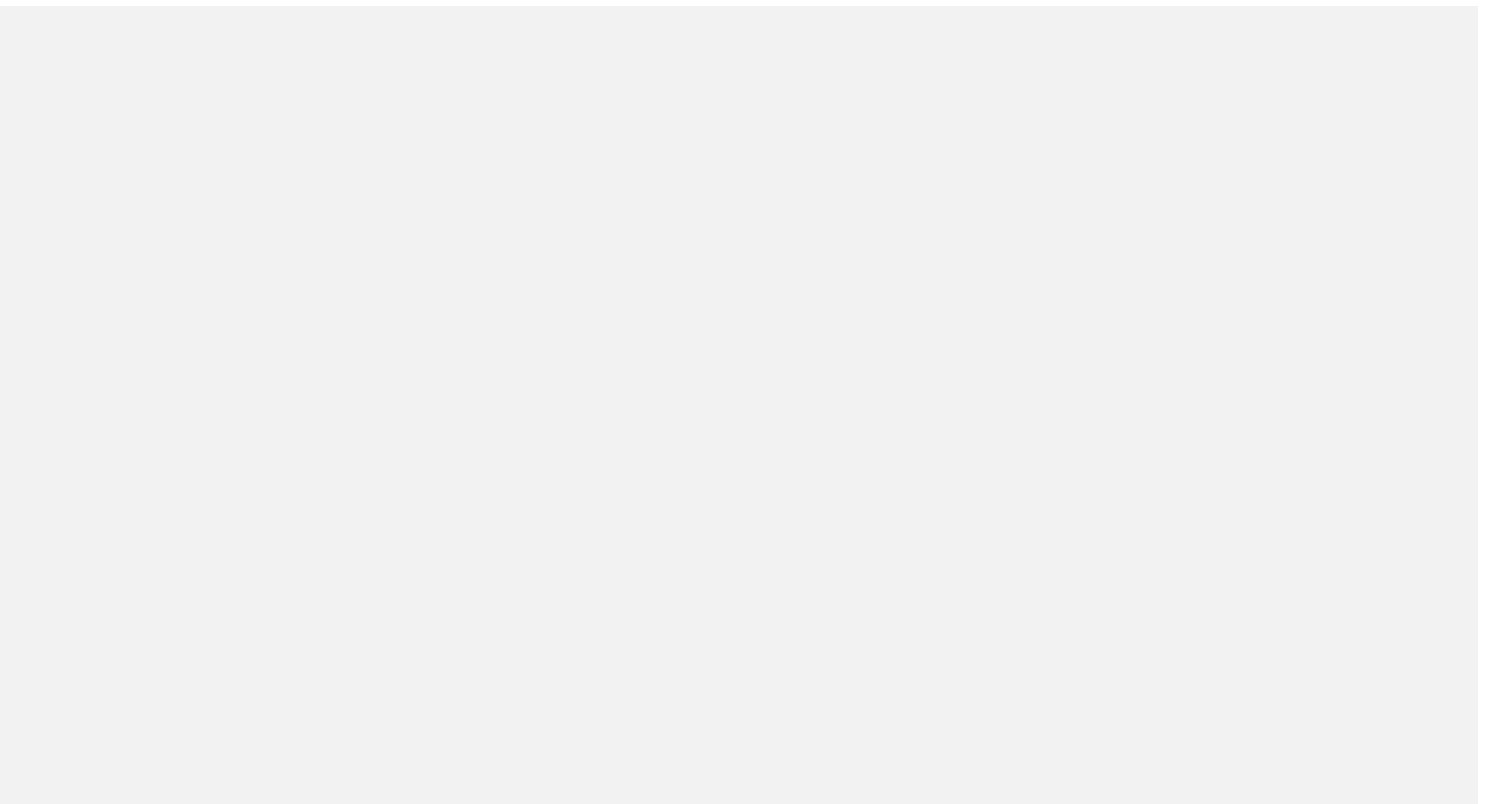
Can you identify 2-3 areas in the process where an “invitation” would help things?



What could you learn if during a conversation about poor performance, you were **only** allowed to ask questions?



Think about a challenging conversation you need to have with an employee (performance, behavior, etc.). How can you embed an invitation – or multiple invitations – into that conversation? What would that look like?



What is one area in which you would like to improve?

Why? What would be different if you improved in this one area?

Whose opinions of you – particularly in this area – matters to you? List their names below

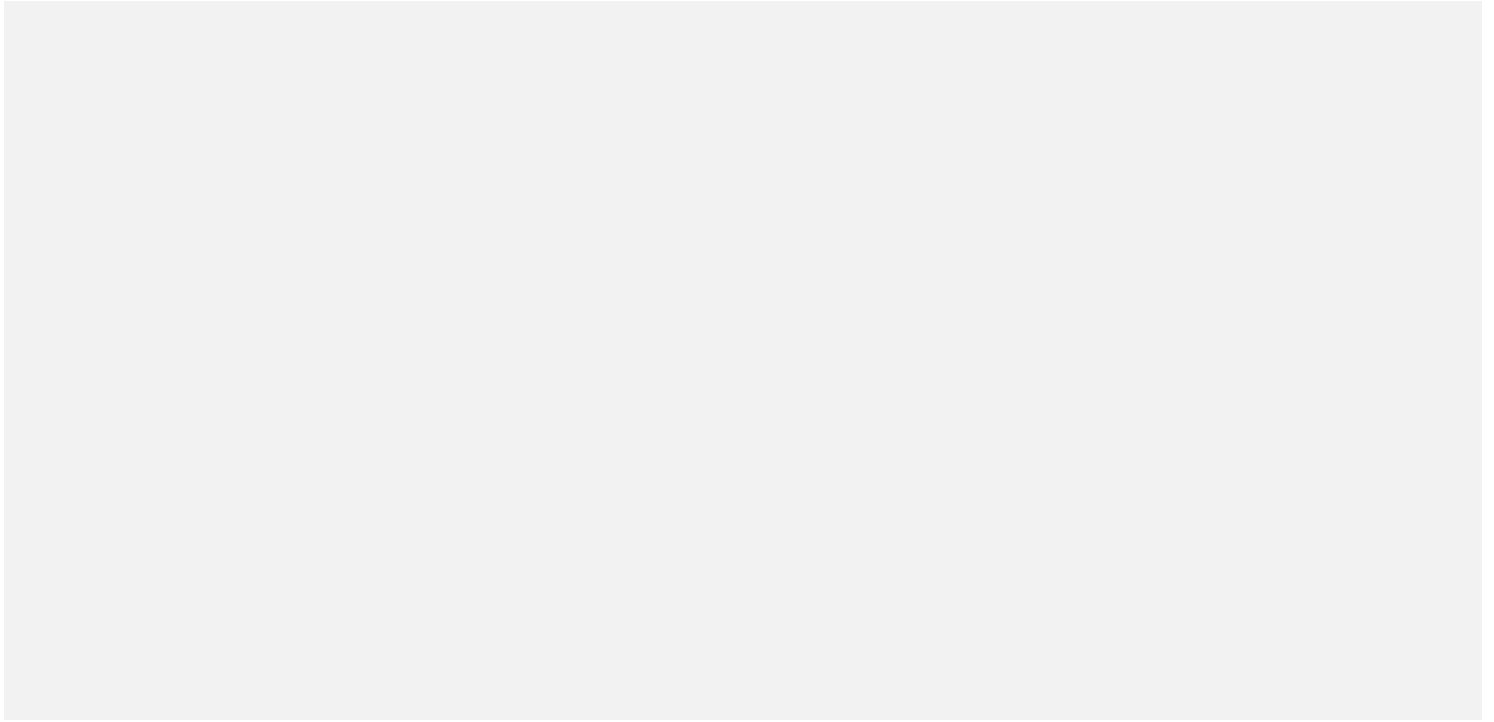
Can you ask those people for feedback?

Yes

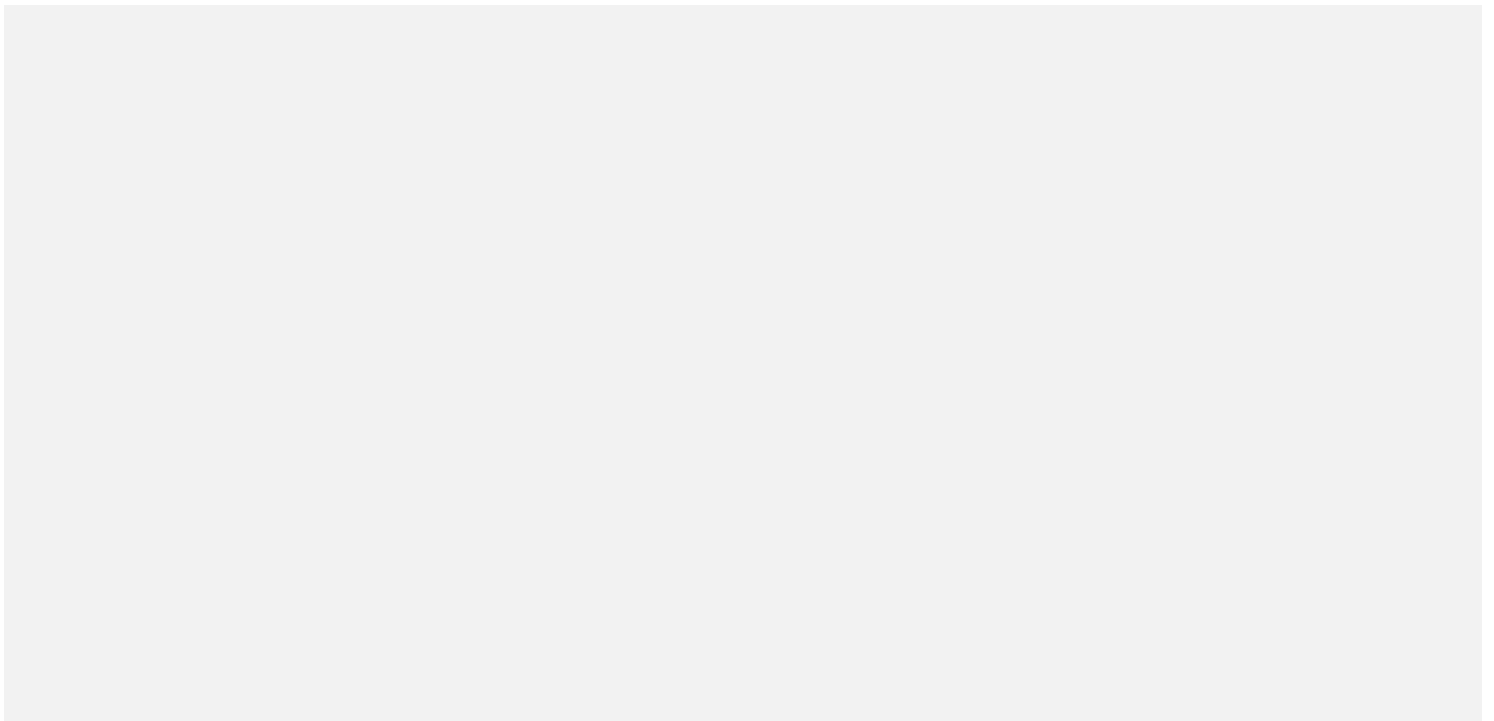
No

If no, why not?

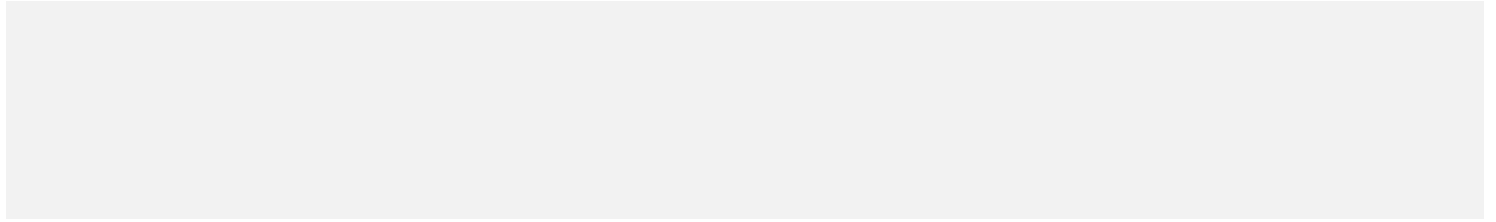
If yes, what questions could you ask them to be sure you get a present, engaged, thoughtful response to your request?



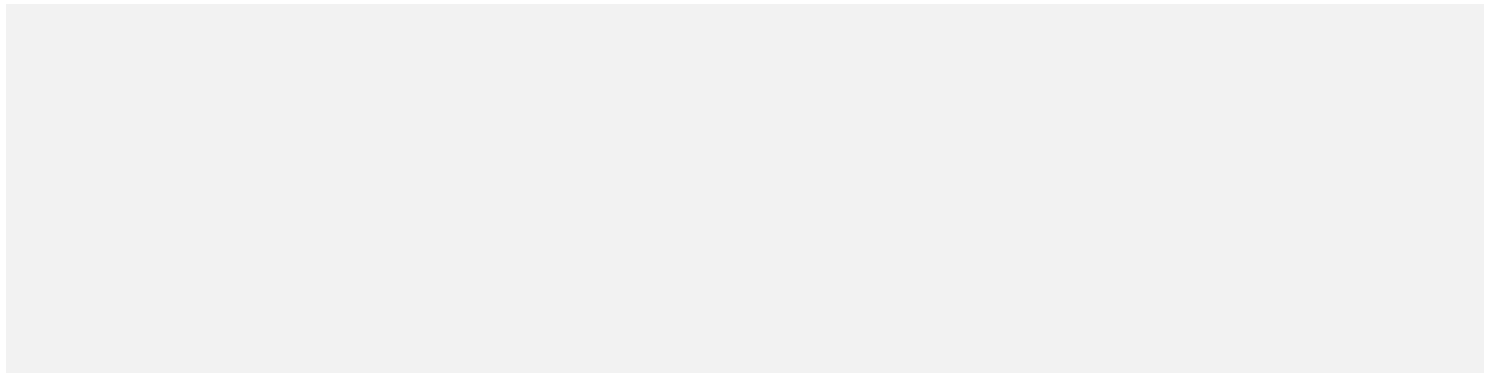
What would be different if you got honest and thoughtful feedback from one of these people?



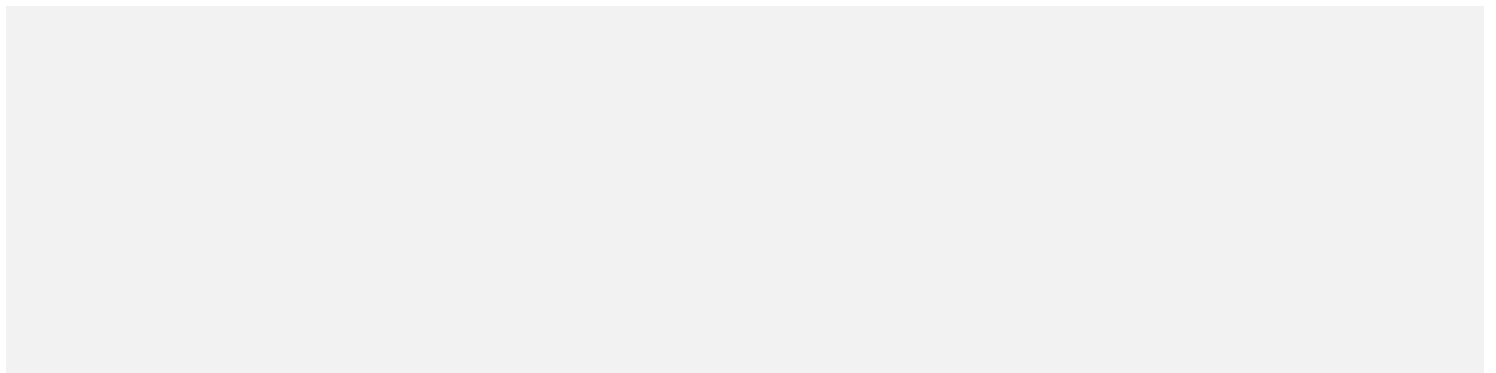
When is the next time that you'll need to engage an audience? That could be a large audience during a presentation, or a small audience during a team meeting, or anything in between. Think about client meetings, team brainstorming sessions, all-hands meetings, etc.



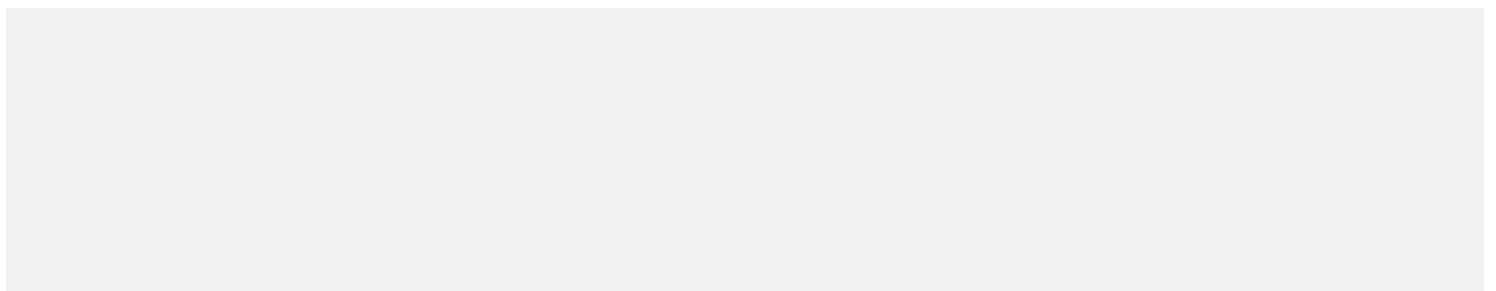
Think about the audience of that engagement. What benefits are there in hearing from that audience directly? What are the risks?



Assuming the benefits outweigh the risks, what are some ways you can invite the audience to participate?

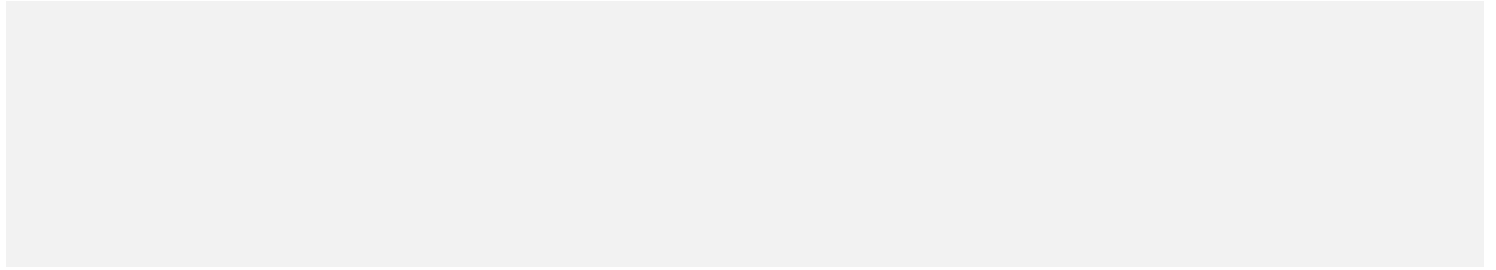


Of the options you listed above, are any of those approaches limiting **who** in the audience would feel safe to speak up?

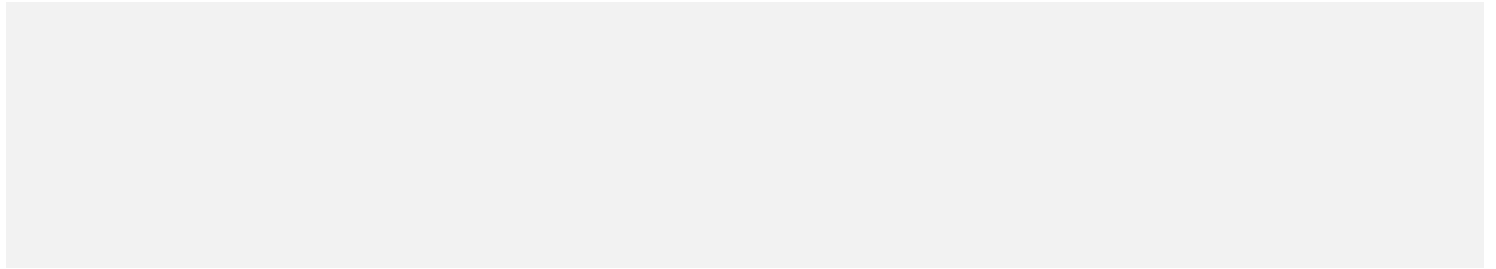




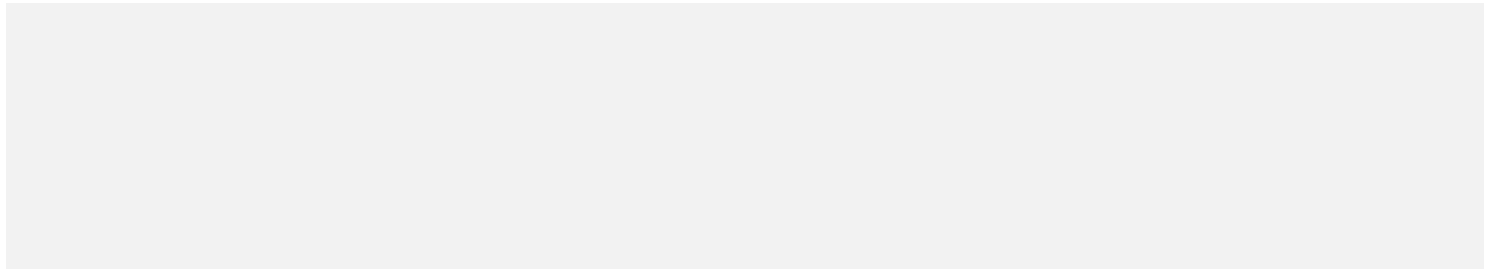
Think about your team. Who sits on the perimeter? In other words, Who remains quiet? Who feels they don't belong? Who is an outsider?



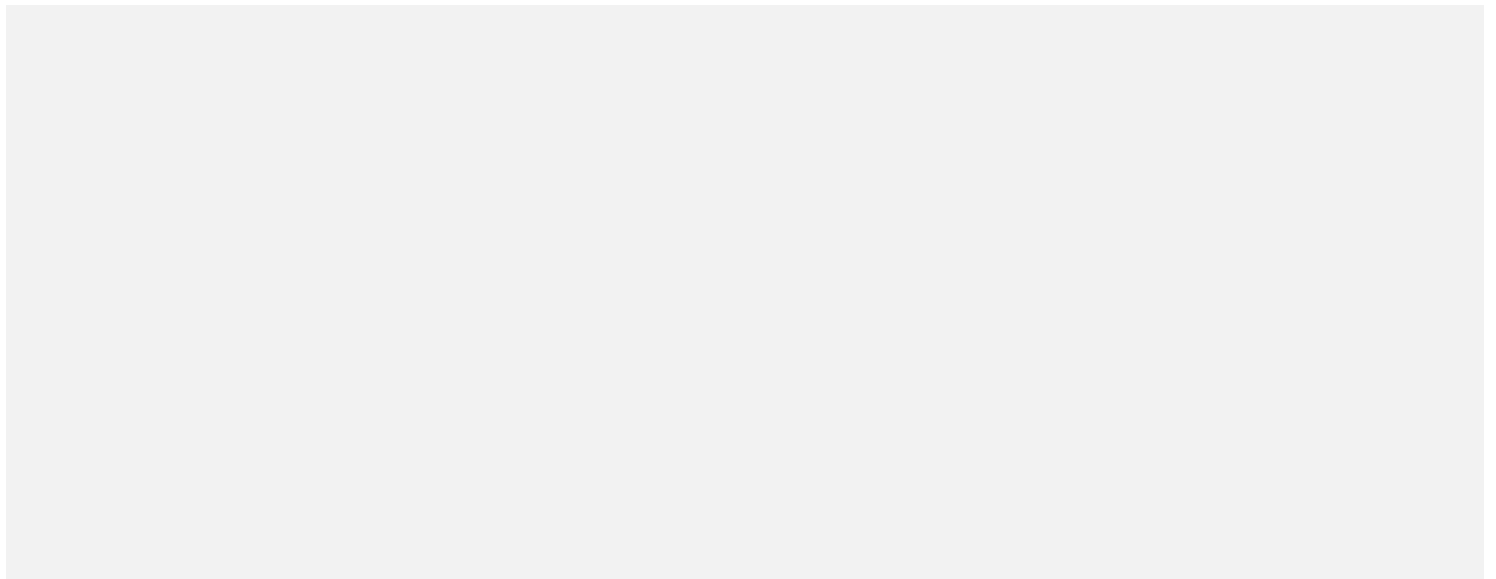
What's your best guess as to why this person or these people sit on the fringe? What might make them different from the rest of the group?



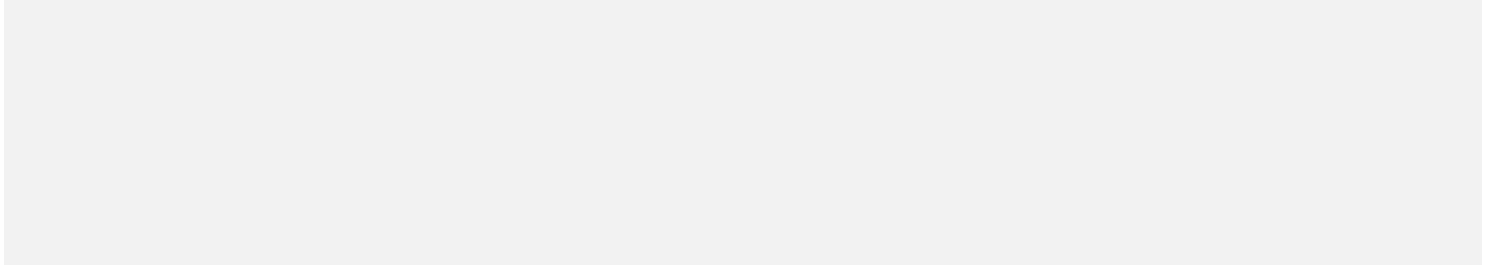
What would it take for those on the perimeter to contribute more fully? What would they need to feel safe?



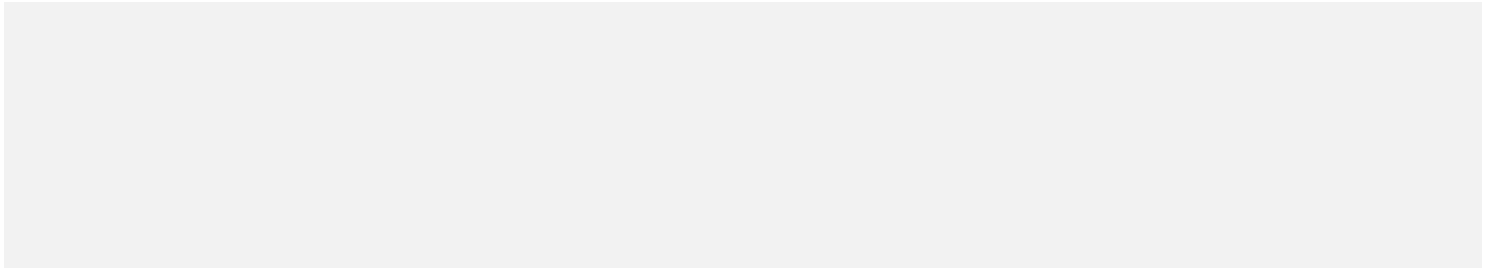
What could you say or do to invite those voices to the conversation?



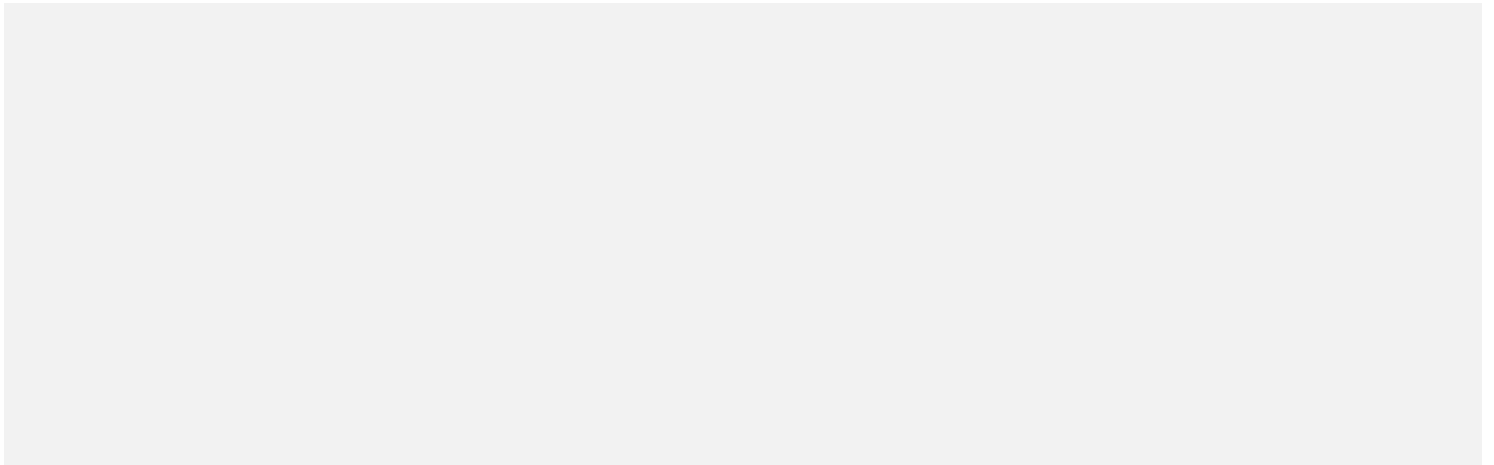
Are there key decisions that need to be made within your team? How can you invite the input from your team to help you make that decision?



What would be different if you heard from every person on the team about this key decision(s)?



How can you invite their input?



General Reflections

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## **Examples of Invitations at Work:**

- *What do you think?*
- *What thoughts do you have on this?*
- *What's your opinion?*
- *How do you see this playing out?*
- *Have you done anything like this before?*
- *Do you have a perspective on this?*
- *What did I miss?*
- *How could this be even better?*
- *What experience do you have with this?*

### **Would you be willing to...**

- ...share your thought process on this?
- ...join me at the meeting?
- ...teach Janelle your approach?
- ...share more about yourself in our next meeting?

### **Tell me more about...**

- ...your thoughts on this
- ...how you approached this project
- ...your experience as a news reporter
- ...how you're feeling

### **I'd love to hear about...**

- ...how you found yourself in advertising when you went to culinary school
- ...what has shaped your worldview
- ...your family
- ...your reactions to the class

### **I'm curious about...**

- ...what inspired you to go into Management
- ...your background in Media
- ...your opinions on this story
- ...what you think

### **Would you share...**

- ...your feedback with me?
- ...more about how you're feeling about the issue from yesterday?
- ...more about what you expected?
- ...more of your time?

## **Invitations When You're In Charge**

- *I'd really benefit from everyone's input...*
- *I appreciate that perspective...how about a different one? Let's have some give and take here, and challenge each other...*
- *Chloe, you look concerned...whatcha thinking?*
- *Brian, you haven't said much...what would you add here?*
- *Erin, what are you hearing from the people in your department?*
- *What challenges are you facing right now? What help do you need?*
- *What is one thing that would make your job easier?*
- *What is one thing that would make you even more effective?*
- *In addition to this meeting, if you have more to contribute, you can use Slack, text, your upcoming 1:1 with me (etc.) to share*

## **Invitations When You're NOT In Charge**

- *Something's been on my mind lately...when would be a convenient time to talk?*
- *I've hit a roadblock, and I could use some guidance.*
- *Some of the other team members and I have some ideas we'd like to run by you*
- *I need help.*
- *How much detail would you like to hear?*
- *I need another pair of eyes on this...do you have any time this afternoon to take a look and give me feedback?*
- *I'd love to get your take on this.*
- *I could really use additional input here.*
- *Are there any expectations that you have that I should know about?*
- *What's the best way to engage with you?*
- *What are some of your leadership values?*

## **Invitations To Someone Going Through Something Hard**

- *I can tell this is a tough time...how are you holding up today?*
- *I heard about X...I can only imagine how hard this is for you...wanna go for a walk and talk?*
- *Given all you're going through, this project probably feels insignificant. Want me to handle things?*
- *What is one thing that would make things more do-able for you right now?*
- *You must be in so much pain...what keeps you going?*

**Make the Invitation.**