The Triangle Strategy
How To Create a Culture of Engagement and Execution

A White Paper by Michael Tull (August 2014)

Introduction

Anyone who reads the leadership and management performance literature has learned that employees become engaged and perform better when they:

- ✓ Have ***open, trusting relationships*** with their managers
- ✓ Are ***appropriately challenged*** by day-to-day work and ***are given opportunities*** for growth
- ✓ Have ***clear targets*** that are ***valued as contributing*** toward achieving business goals
- ✓ Feel that their ***opinions count*** and are ***taken into consideration*** in decision making
- ✓ Receive ***regular feedback*** on their performance and are ***recognized for successes***

These characteristics are regularly identified as being fundamental to high-performing organizations. It seems, however, that managers do not have a clear understanding of how to create this kind of operating culture.

Through my investigation on how to develop such a workplace, I've created the Triangle Strategy: a performance model that takes well-known best practices for leading and managing and forms them into a practical, easily applied framework. One that unravels the mysteries of the performance process and provides managers and their teams with a guide for creating an engaged, execution-focused operating culture.

The Journey

My journey started a few years ago when I coached George, an information technology expert for an international bank who had recently been promoted into a team leader role. In our first session, George mentioned that he wasn't sure he wanted to take on the supervisory position. *"I understand systems,"* he said, *"but I don't understand people. Can you give me a system for managing people?"*

Good question. I had been in the management development field for over twenty-five years as a manager, trainer, and coach, but the performance models I knew seemed too complex. I said I'd give it some thought.

At subsequent meetings, I introduced George to a systematic approach for leading his group. It was a three-phase process that combined accepted leadership and management practices. I suggested that he first, set expectations, then provide support while allowing people space to do their work, and finally, give feedback about their performance.

This white paper includes excerpts from *The Triangle Strategy: How to Create a Culture of Engagement and Execution*, Michael Tull, April 2013

Setting Expectation The purpose of the setting expectations is to ignite interest in achieving a goal and start assignments off on the right track. Whether delegating a routine assignment or initiating a change, the objective of these conversations is the same: to establish clear action steps, operating parameters and ownership of an assignment.

It helps people to get grounded quickly and focuses attention on the work that needs to be done. It's the first step in building an effective working relationship between managers and performers and provides the foundation for future support and feedback conversations.

Provide Support It's not always recognized that a major aspect of the manager role is to provide support when it's needed. It's crucial that people feel comfortable asking for assistance when they're unsure about how to proceed. These are opportunities to review incremental results, respond to performer concerns, and discuss any issues that may be inhibiting their performance.

The aim is to 1) ensure that projects remain on track and prevent surprises as deadlines approach, and 2) have performers leave these meetings feeling energized and focused in the right direction.

Give Feedback The most effective feedback loops back to and strengthens the original expectations. Feedback should become a routine part of the manager/performer working relationship, rather than being reserved for semiannual or annual performance reviews.

Since giving feedback is not a natural skill for many of us, it's often avoided. However, it's a critical element in the performance process, so it's important that we hone these skills and raise our comfort level.

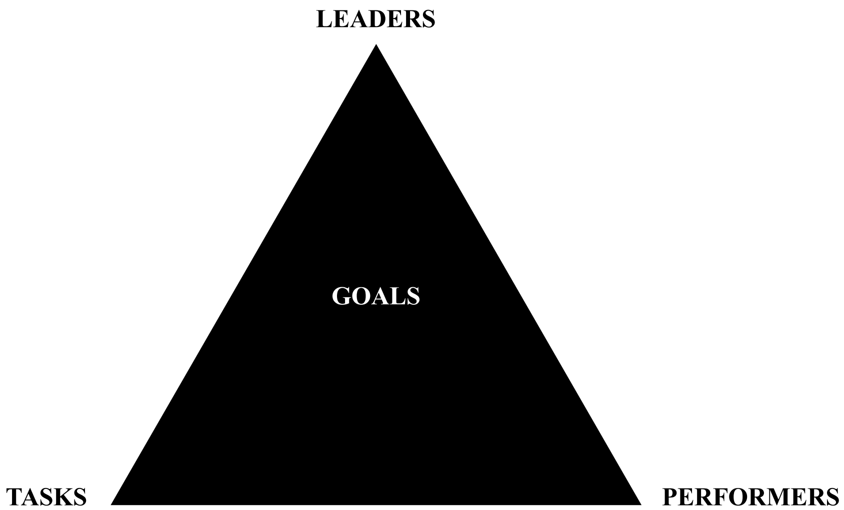
This three-phase sequenced approach made sense to George and, during our work together, he became comfortable the process. George decided to accept the job, and I learned from his manager that he was doing very well.

The set of management practices that I had introduced to George were sufficient to get him started in his new role. However, I recognized that this was only the first piece of the performance puzzle, and that a more comprehensive strategy was required for him to become truly effective.

The Triangle

My discussion with George started me on a path to identify the critical elements that impact day-to-day operational performance. Gradually, by reviewing the literature and discussing performance issues with clients and colleagues, the Triangle Strategy—a high-performance model for managing—began taking shape.

It soon became clear that all work in organizations includes four key elements: 1) *Leaders* who set direction, 2) *Performers* who execute the work of the organization, 3) *Tasks* that need to be done, and 4) *Goals*, toward which all work activity is focused. The Triangle below illustrates the relationship between the four elements.



My next question became: *When an organization is functioning at a high level, how would each of these elements be described?* This investigation led to the following definitions, which should resonate with your experience. As you read them, think about the work you do and the role you play in your organization.

Goals

Well-defined goals include three components: a purpose, a target and balance. *Purpose* identifies the business reason for the goal—why it's a worthwhile challenge. *Target* defines what needs to be accomplished and the time frame in which to do it. *Balance* suggests that management identify a full spectrum of performance measures to avoid unintended results.

Leaders

As defined by the Triangle, a leader can be anyone who delegates work to others. Executives and mangers fall into this category through the requirements of their position. Performers on the frontline also take on the leader role, for instance, when asked to head up a project team.

The main task of leaders is to engage performers and provide direction toward executing operational goals. Their vehicle for doing this is through setting expectations, providing support and giving feedback.

Performers

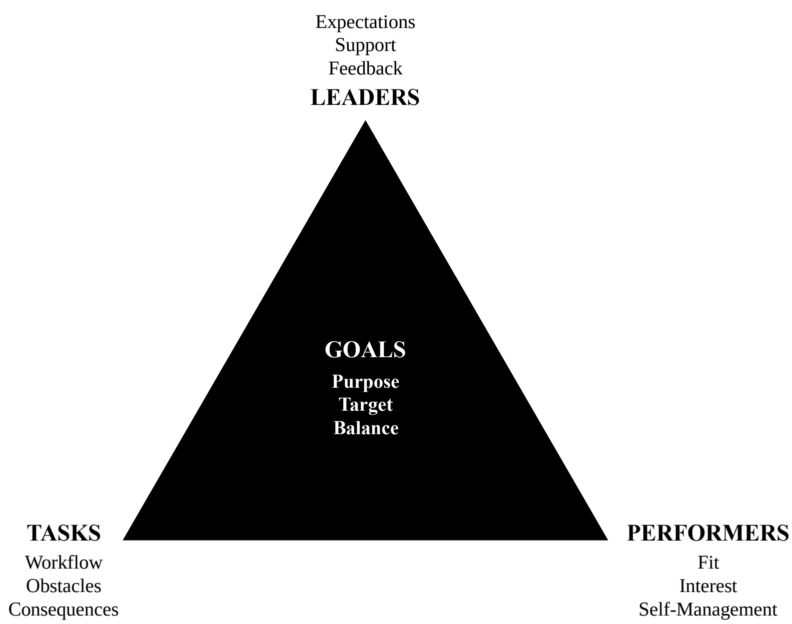
Performers are defined as those who perform the day-to-day tasks that move a business forward. Both executives and managers function in this role much of their time.

For Performers to be effective they should be the right *fit* for a position, having, or being able to obtain, the skills, knowledge, and experience to do the work while also possessing the intellectual, psychological, and physical abilities to fill the role. A leading indicator of a performer's success is the *interest* they have toward their work—whether they can see value in what they're being asked to accomplish. And they need a talent for *self-management*, which is the ability to manage time, tasks and priorities.

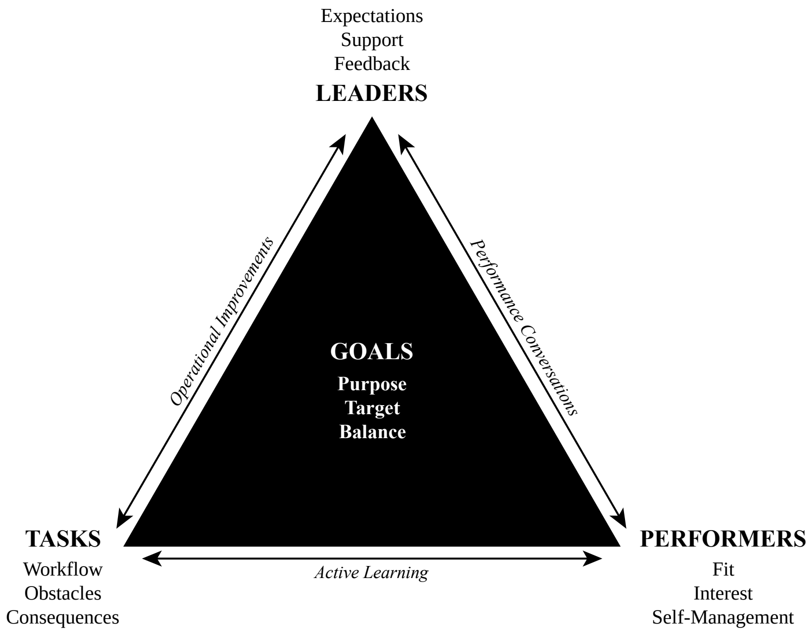
Tasks

Tasks represent the work that takes place within an organization. Three critical task elements include: workflow, obstacles, and consequences. *Workflow* represents how tasks are done—the steps and actions required to do the work or complete an assignment. *Obstacles* represent the barriers that could impede work. *Consequences* refer to the positive or negative effects that performers experience from doing their work.

This is how the Triangle looks with these definitions in place.



Although more complete as it now stands, the Triangle above represents a static view of the workplace, when in fact organizations a dynamic environments in which there is constant learning and adaptation. In order to represent this learning process, three arrows have been added that suggest Leaders and Performers need to continually be asking the question *"How can we do things better?"*



The arrow between *Leaders* and *Performers* represents the core ***performance conversations*** that need to take place: setting expectations, providing support, and giving feedback. The arrow suggests that these are two-way conversations, the aim being to stimulate discussions in which thoughts and ideas are shared openly.

The arrow between *Performers* and *Tasks* represents an ***active learning*** mindset***,*** a process of discovery that encourages performers to reflect on their actions and results, and use insights to improve their effectiveness.

The arrow between *Tasks* and *Leaders* represents management's continued attention to making ***operational improvements.*** Leaders assess operational results on a regular basis and remain vigilant for opportunities to fine-tune how the organization functions.

The difference between active learning and operational improvements is that active learning, for the most part, aims at short-term adjustments and immediate impact. Conversely, operational improvements may address more complex issues—such as policies and procedures, organizational structure, and workplace culture—that can have long-term consequences on a broad spectrum of work activities.

The Triangle represents a universal performance strategy. Regardless of whether the organization is an outdoor greenmarket, a local restaurant, or a corporate headquarters, it will have these features. Despite the different façades, you will observe people functioning in *leadership* and *performer* roles, working on a series of *tasks* directed toward achieving specific *goals*. If you are striving for a high-performing operational culture, all of the Triangle elements need to be in place. Every degree you are removed from the optimum reduces the competitiveness of your organization.

Application

There is a better chance of accomplishing your goals if the work to be done is considered through the lens of the Triangle. When I've shown colleagues and managers the Triangle, they have found that it provides a quick way to frame and discuss performance issues. Focusing on the Triangle elements helps you hone in on the variables—both positive and negative—that will have the most significant impact on results.

Below is a photograph of managers using the Triangle to collaborate on resolving a performance issue.

The Triangle does not provide answers but directs you toward the right questions. For instance, the following questions highlight issues to consider when planning a change process.

Goals	*What is the purpose for initiating this change?* *What do we want to accomplish; what is the time frame?* *What would be a full set of indicators for measuring success?*
Leaders	*What is the best way to communicate our expectations?* *When should we schedule progress review meetings?*
Performers	*How can we prepare staff members to make the needed changes?* *How can we assess their interest level in the goals?* *What present assignments do we need to shift in order to balance the new workload? Are there any distractions?*

Tasks	*What are the critical the tasks involved in making the change? Can they be organized more effectively?* *What are potential obstacles that could interfere? How can we eliminate them or reduce their impact?* *What will be the experience of staff members in making the changes? What will it be like for them when the change is completed?*
Operational Improvements	*Do we need to adjust policies, procedures, or our organizational structure in order to execute the change effectively?*

By bringing together groups of managers or frontline staff to discuss these types of question, leaders can engage those responsible for executing the changes and create a sense of ownership for the implementation.

The best way to understand how the Triangle works is to try it out. It is through the process of working with the Triangle that it will become meaningful and valuable. The Triangle can be used proactively during a planning process, as above, or reactively to analyze an underperforming situation.

Pulling It All Together

The Triangle embodies a comprehensive framework for creating a workplace culture in which everyone is engaged and focused on implementing operational plans. The reality, in most organizations, is that not all the Triangle elements are in place. Goals are not always clear; leaders don't always provide necessary feedback; performers are not always the right fit for their positions. Leaders and performers often need development and nurturing; the Triangle points to where attention is needed.

Learning to use the Triangle helps clarify the performance process so you are better able to focus your actions and schedule your time. Although these concepts may not be new to experienced managers, the Triangle provides a framework that will keep them at the forefront of our minds.

The real benefits come from using the Triangle to guide actions and as an analytical tool. Whether you're delegating an assignment, initiating a change, or starting up a new team, the Triangle will help you focus on the actions to take in order to have the most effective results. In order to create a highly effective workplace, everyone in the organization needs to make these practices routine and a normal part the organization's operational fabric.

In the Appendix of this article are:

- Details for conducting the Performance Conversations
- Guiding Principles for conducting Performance Conversations
- Examples of how to apply the Triangle

Conducting Performance Conversations

The three performance conversations—setting expectations, providing support, and giving feedback—represent the most impactful element in the Triangle. Providing the foundation for all performance-based discussions between leaders and performers, they are inextricably linked. Each discussion has a specific purpose, and the quality of these conversations has much to do with how engaged and productive people are in the workplace.

This section provides managers with a guide for conducting performance conversations. Although not a script, topics are recommended that would facilitate an effective flow and exchange of information. Chapters in the book, *The Triangle Strategy*, offer a more in-depth perspective from the leader and performer points of view.

Setting Expectations

Setting expectations is the initial conversation in the performance process. It's a leader's opportunity to ignite performer interest in the work. How well these conversations are conducted can determine the level of performance that people achieve. The aim is for leaders and performers to come to an agreement about goals, and collaborate on figuring out how tasks will be accomplished.

Whether delegating a routine assignment or initiating a change, the objective of these conversations is the same: to establish clear action steps and operating parameters, ownership of an assignment, and a schedule for monitoring and providing support. The following is a framework for conducting these conversations. Although this is not a script, it's recommended that these topics flow as outlined.

Goals	Clarify goals to ensure that everyone involved understands the purpose and aims of the assignment.
Benefits	Highlight the value of achieving the goal—what it will mean to the performers, their teams, and/or the organization.
Actions	Create a set of action plans that performers can own. Include task assignments, due dates, and a schedule for progress review meetings.
Obstacles	Identify potential barriers that might impede the implementation. Discuss how to eliminate the obstructions or reduce their impact. Adjust plans if necessary.

The purpose of the setting expectations is to ignite interest in achieving a goal and start assignments off on the right track. In doing so, these discussions provide the foundation for future support and feedback conversations.

Providing Support

Although performers are responsible for an assignment when they take it on, support conversations are meant to help them along. When *providing support*, the objective is to offer assistance and encouragement as well as recognize progress—to discuss how things are going and prevent surprises as deadlines approach. These may be informal, stop-by-your-desk conversations or scheduled meetings.

Although informal conversations can be appropriate when experienced people are doing routine tasks, scheduled meetings are built into implementation plans when performers require close attention or when lengthy assignments need to be monitored over a period of time. The following framework can help guide either type of conversation.

Review	Check progress against plans; compare to expectations and deliverables.
Assess	Acknowledge what has been done well, and call attention to areas needing improvement.
Learn	Discuss ideas for working more effectively.
Adjust	If needed, change the implementation plans.

This structure can help you address a number of important performance issues in a short amount of time. The objective is to resolve problems, bolster performer confidence, and maintain forward momentum.

Giving Feedback

People spend a lot of time at their jobs and they work hard. They deserve to know how their work is being perceived. In that respect, all feedback, both *positive* and *corrective*, is constructive.

Positive feedback reinforces good performance; it tells people to keep doing what they've been doing. It recognizes a person's ability and contributions to the organization, provides encouragement, and demonstrates that efforts are appreciated.

Corrective feedback guides those who need to adjust behavior; it steers them back onto the right path. Without corrective feedback, people may be doing tasks incorrectly, inadvertently wasting time and energy. Corrective feedback has two phases:

> *Phase I* is normal feedback that brings attention to actions that need to change. In most instances, this will be sufficient.

Phase II is called for if improvements are not made after three feedback meetings. During corrective conversations, you are essentially putting performers on warning.

Some managers are uncomfortable conducting these conversations. That's understandable; feedback meetings can be emotional. Whether giving positive or corrective feedback, the following framework will provide a structure for engaging in these discussions.

For organizations to be truly successful, providing feedback needs to be a routine part of the operating culture.

Observations	Share what you have noticed about a person's performance and its impact on the assignment or other team members. Use data or facts to reinforce your feedback.
Reactions	Before you move forward, allow time for reactions and to discuss the performer's point of view.
Exploration	In the case of corrective feedback, collaborate in figuring out how to get back on track.
Solutions	Agree on a plan of corrective action.

For organizations to be truly successful, providing feedback needs to be a routine part of the operating culture.

Although each performance conversation has a distinct purpose, they often work in tandem. For instance, support conversations provide opportunities to give positive feedback. Similarly, feedback conversations become vehicles for reviewing and possibly resetting expectations.

Performance conversations represent the core set of practices that managers must develop if they want to build engaged teams that excel in operational execution. When conducted effectively, these meetings become a mechanism for fostering open, trusting work relationships.

Guiding Principles for Conducting Performance Conversations

Performance conversations provide the foundation for creating effective leader-performer partnerships. Years of experience, reinforced by the prevailing business literature, suggest that there are three guiding principles that can help make these meetings productive.

Aim for Two-Way Conversations

In two-way conversations, each party is open to hearing the other's point of view. Such conversations provide opportunities to get a better understanding of what others know and how they think. These are collaborative discussions that encourage people to express opinions and ask questions. The objective is to engage all parties in order to bring out the best ideas and develop ownership for decisions. It is widely accepted that when people are engaged in discussions about work and feel that their ideas are being considered, personal responsibility begins to flourish.

Consider Individual and Organizational Needs

It is not uncommon that organizational goals become the focus at the expense of individual needs. In order to build an engaged, productive workforce, you need to create a balance. Performers who give their best effort will continue working at that level if they feel the organization is also helping them reach their personal goals. Keeping this in mind increases the likelihood of satisfying the needs of both the organization and the performer.

Remain Goal-Focused

Performance conversations often do not follow a direct line from start to finish. They can be complex and emotional, possibly causing a conversation to veer off on tangents and lose focus. In order to use time effectively, leaders and performers need to concentrate on the purpose for the meeting. A clear goal provides the hook for reigning in wandering discussions and keeping conversations on topic.

These guiding principles provide the foundational set of values for conducting effective performance conversations. They bring attention to both the human and business sides of the organization by encouraging engagement while keeping the focus on execution.

Applying the Triangle

The purpose of this section is to provide a few examples of how to apply the Triangle in your work. I've chosen four situations that are commonly found in the workplace and honed them down to their essentials. I suggest that you start with the case that is most relevant and interesting to you. My hope is that by reading these cases, you will identify additional situations for using the Triangle in your organization and begin to see the disciplined thought process it leads you through. The situations include:

1. Delegating an assignment
2. Improving underperformance
3. Introducing a change initiative
4. Transitioning to a new management role

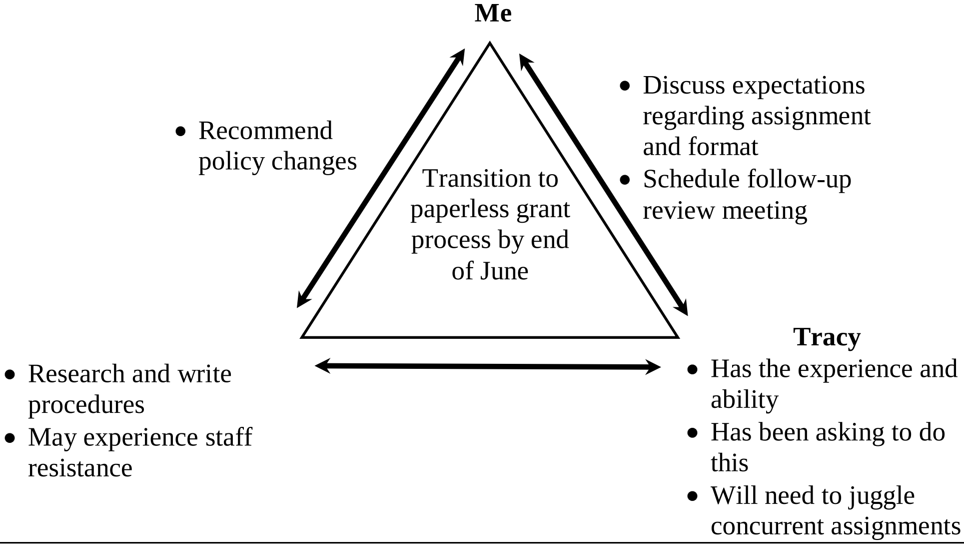
An instructional note: When using the Triangle as an analysis and planning tool, you should start by identifying 1) the goal, 2) the leader, 3) the performers, and 4) the task. Then you have a choice of creating an illustration of the Triangle, which will provide a quick snapshot of the situation, or writing a more detailed description using the Triangle elements as an outline. Depending on your needs, either method will help you organize your thoughts.

Delegating an Assignment

Delegating work to others is a normal management task. Because of its routine nature, managers often do not think through their expectations or other performance issues before handing off assignments. The following case provides an example of how a manager used the Triangle to plan for conducting the delegation meeting.

Situation: Jean manages the administrative functions in a nonprofit grant-making organization. She wanted to change their grant process to one that was paperless and planned to delegate the assignment to Tracy, whose job was to oversee the management of the grant records.

Go to the Triangle: First, Jean created an illustrated Triangle to quickly jot down her initial thoughts. Next, she used the Triangle outline to broaden her understanding of the assignment.



The illustration provides a visual representation of the issues involved. An outline, such as the one Jean made below, is a more comprehensive analysis.

Goals *Purpose:* Develop a policy that provides guidance to the staff on how to maintain electronic grant records.

Target: Test and implement the new policy by the end of June.

Balance: Make sure the procedure is accurate, clear, and easy to use.

Leaders *Set Expectations:* Although Tracy has experience administering the grant records, I'll need to be very clear about the need to make the new procedures user-friendly.

Provide Support: Schedule regular meetings to review her progress and assess her needs.

Give Feedback: Highlight areas where she's being effective and areas that need improvement.

Operational Improvement: Recommend the change in policy to the executive team.

Performers *Fit:* Tracy has been maintaining both electronic and paper records for two years, so she understands the issues involved in transitioning to a paperless office. However, she does not have experience writing policies.

Interest: She has wanted to reduce our reliance on paper for a while and has asked to be involved with this change.

Self-Management: Although Tracy is self-directed and juggles a myriad of tasks well, she will need to do this project along with her normal daily tasks. Time management may be an issue, so I will need monitor that her workload remains manageable.

Task *Workflow:* Before drafting the new policy, Tracy will need to research other foundations that have made similar transitions to learn how they instituted their policies and procedures.

Obstacles: There is a chance that staff will be resistant to making this change. It will require them to upload documents directly to our database rather than dropping a hard copy on Tracy's desk for filing. I will encourage Tracy to meet with staff members to understand their concerns and take them into consideration when developing the new policy.

Consequences: It's possible that resistance to new procedures could make this a negative experience for Tracy. Hopefully, by reaching out to others as she moves forward, this will not be an issue. I will need to monitor this aspect of the project and possibly be involved in some of these conversations.

From her analysis, Jean realized that she needed to spend time with Tracy to make sure that she was both comfortable with taking on the project and understood what was required. Jean also identified that it would be important to engage other staff members during the process of developing and implementing the new policy.

Improving Underperformance

A manager's challenge is to develop and maintain a high-performance work team. Frequently, and despite best efforts, work will veer off track. Here is a scenario demonstrating how to use the Triangle to resolve a situation in which underperformance has become an issue.

Situation: Tina heads up a customer service center for a manufacturing company. Part of the organization consists of teams assigned to fielding calls for different products. A team managed by Sam has been highlighted in the error reports. On a number of occasions over the last month, they have taken the wrong corrective action or used an incorrect procedure to resolve client problems. Although Sam has worked as a supervisor in Tina's area for a few years, he never seemed completely comfortable in the role.

Go to the Triangle: Before calling Sam into her office to discuss the situation, Tina decided to use the outline format to plan for the meeting.

Goal *Purpose:* To resolve the team's performance issues.

Target: Figure out what's causing the problem, and begin implementing solutions within two weeks.

Balance: There is an urgency to fix this. However, I should take the time to involve Sam and his team in resolving the situation.

Leaders *Set Expectations:* I need to emphasize that this problem must to be resolved quickly and that I expect Sam and his team to participate in the process.

Provide Support: I've been focused on other projects, so I haven't paid sufficient attention to Sam and this team. I could have seen this coming.

Give Feedback: I need to make sure that Sam and his team understand the areas in which errors are occurring and discuss potential solutions.

Performers *Fit:* Sam's team was moved into this department because of a reorganization. As far as I know, they did not have these kinds of performance issues in their previous department. Sam and I need to assess whether the group was trained adequately. The mistakes are not isolated to one or two individuals, so there may be some sort of systemic problem here.

Interest: Since this group did not have a problem before the reorganization, maybe they are simply not interested in the work of this department.

Self-Management: Our calls involve more complicated customer issues than the team was used to. It's possible that they are overwhelmed. I also need to consider whether Sam is the right person to supervise this group. He will be adding to the problem if he's hesitating to give the team feedback on their errors.

Task *Workflow*: First I need to discuss with Sam the effectiveness of the procedures for answering calls. Then I can engage the team in the analysis of the problem and in developing a solution.

Obstacles: We're in the midst of a busy season. It's going to put a time constraint on our discussions, but I need to make sure that we agree on how to resolve this.

Consequences: Customer relationships are at stake if this problem is not resolved quickly.

Although Sam may be contributing to the problem, Tina understands that she needs to involve him in the assessment. The Triangle elements provide a lead into a series of questions that Tina can use in the conversation with Sam.

Goals Questions about goals

Is the team clear about our goals?

Do they see the goals as relevant and beneficial?

Leaders Questions about the leader's impact

Have I been clear about our expectations?

Has the team received sufficient feedback and support?

Performers Questions about the performers

Do you think they have the ability to respond to these calls effectively?

Are they interested in fielding these kinds of calls?

Can they manage the call volume?

Tasks Questions about the tasks

Is there a problem in our call center support process?

Are there obstacles or distractions affecting their results?

How do these errors affect the team and our clients?

This is a general set of questions that can be applied to understanding any situation in which underperformance is an issue. They help to quickly focus in on the critical issues that impact performance levels and offer a vehicle for engaging performers in this conversation.

Introducing a Change Initiative

Change initiatives are a constant in organizations, whether in the form of new technology, policies, procedures, or ways of organizing the business. Although varying in complexity, all successful change projects have certain elements in common. They require clear goals, leaders who understand their roles, and performers who are able to execute tasks according to plan.

This case involving a software company highlights how these elements come into play when changing a healthcare policy.

Situation: Peter, the CEO of a software development company, felt that costs for their healthcare benefits plan were getting too high. He asked Barbara, the VP of Human Resources, to investigate other options. Barbara assigned the project to Nicole, who did the research and presented her recommendation to Barbara and Peter. After further discussions with the new insurance vendor, a final set of options was chosen. Nicole was then assigned to implement the change.

Go to the Triangle: In order to clarify what needed to be done, Nicole used the Triangle to construct a plan.

Goals *Purpose:* To provide the best possible benefits program to employees while staying in line with the company's cost structure.

Target: Have everyone enrolled in the new healthcare package by the third quarter.

Balance: Although we need to implement this change quickly, we want to allow enough time to answer all employee concerns.

Leaders *Set Expectations:* We need to be clear that the company remains committed to providing effective coverage. We'll continue monitoring the program to ensure it includes appropriate new options as they are introduced by the insurance industry.

Provide Support: Representatives from the insurance company will present the new plan and be available to answer any immediate questions. They will also offer a hotline that can be called after the plan has been implemented.

Give Feedback: I need to communicate to employees that we will keep them informed of our progress as we lower our costs.

Performers *Fit:* This change will impact everyone employed by the company. It is important that we provide enough information so people understand the new options.

Interest: The current plan is well liked. Employees will want to know how this change will affect them personally.

Self-Management: We are allowing a month for people to discuss the changes and make decisions with their families. It is up to them to elect the new policies before the deadline.

Task *Workflow:* After sending out information packets regarding the new plan, I will conduct Q&A sessions with the staff. Employees can then select and sign up for the plan that best fits their needs.

Obstacles: If we conduct our Q&A meetings effectively and provide an easy registration process, there shouldn't be any obstacles.

Consequences: If we delay this process, the rising healthcare cost may impact our competitiveness.

By conducting this analysis, Nicole realized that she would need Peter and Barbara to make statements about their commitment to continue offering a high level of health insurance. She also knew that she needed to figure out the best way to conduct the Q&A sessions and provide time for further questions after people had discussed the changes with their families.

This case describes a fairly straightforward change project. An initiative involving a broader organizational change would require identifying the issues and needs at different levels of the organization. A cascading set of illustrated Triangles can be useful for this purpose. The following example demonstrates how this hierarchal approach works.

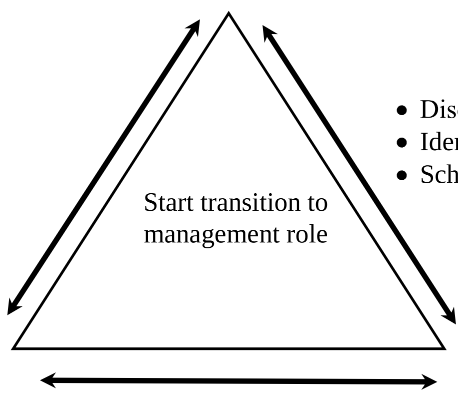
Transitioning to a New Management Role

The transition of moving into a new management role can take a number of different forms. It could be a promotion from a frontline position to a supervisory or managerial assignment, or it could involve a manager being transferred to lead a different group. Whether you are a frontline employee or an experienced manager, many aspects of moving into new roles are similar. Following is the case with Lisa, who was recently promoted to a management role.

Situation: Lisa has been working as a fabric designer in her company for seven years. Daniel, her manager, was recently promoted and wants Lisa to take over their group. She is interested in the challenge, but is not sure how to go about making the transition.

Go to the Triangle: In the process of doing her analysis, Lisa realized that before she would be ready to move into the management position, she needed to discuss the role with Daniel. The second step would be to meet with her team. Therefore, she drew two Triangles. The first depicts Lisa as the Performer, with Daniel in the Leader role. In the second, she is in the Leader position, as well as in the Performer position along with the members of her team.

Daniel



- Discuss Daniel's expectations
- Identify team priorities/goals
- Schedule follow-up meeting

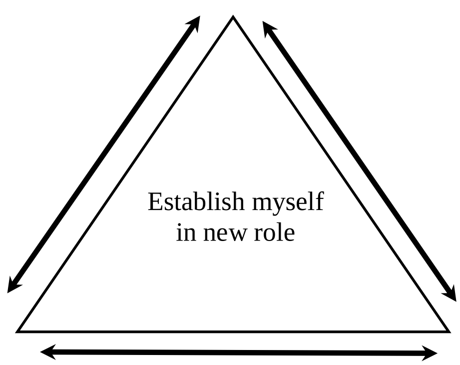
Prepare for New Role

- Research and sign up for management programs
- Prepare for meeting with the team

Me

- Identify personal development needs
- Think about personal goals and how I want to manage the team
- Assess my workload and what should be delegated

Me



Team Meeting

- Discuss my expectations of the team and their expectations of me
- Have open discussions about my role and any subsequent changes

- Monitor progression of meeting

Me and the Team

- They're an experienced team
- I have good relationships with all of them

As a designer, Lisa is a visual person; therefore, drawing the two Triangles was sufficient for her. They provided a graphic snapshot of discussions she needed to have with Daniel and her team.

Pulling It All Together

The elements of the Triangle Strategy help to direct your thought process. When working with either the Triangle illustration or outline approach, the trick is to not get stuck if an idea does not fit neatly into one of the categories. Instead, write it down. As you continue, you will either find a place for the idea, or you may recognize that it does not help advance your analysis so you will discard it. With either approach, the aim is to gain a broad understanding of the performance issues at hand so that you can develop well-thought-out execution plans.