Behavioral Guide

A Practical Guide To Improve Psychological Safety At Work

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Contents

Psychological safety is built at the behavioral level.

Culture is an interwoven string of interactions, perceptions, expectations, and opinions. It's the way we interact. While your organization's macro-culture may claim to have all the psychological safety in the world, what's actually going on at the team-level might be wildly different.

Remember, you can't speak a psychologically safe culture into existence. So how do you ensure that psychological safety is present in your organization? You intervene at the micro-culture level, at the level where the everyday interactions happen.

The Anatomy of Culture:

Macro-Culture · Sub-Culture · Micro-Culture
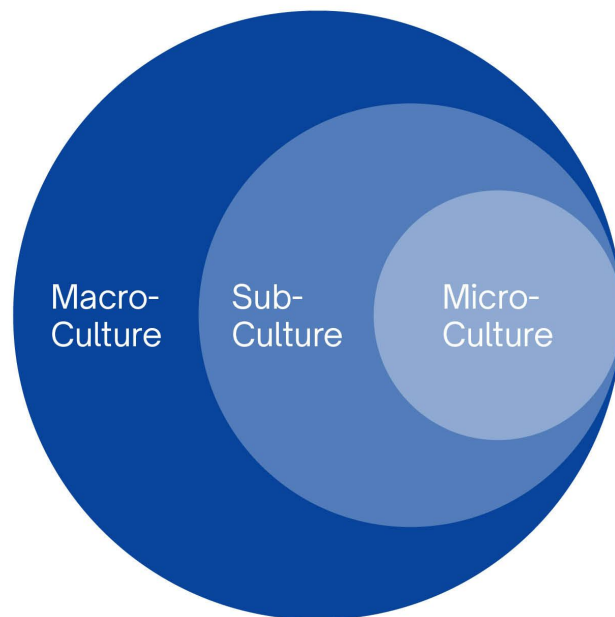
We define psychological safety as a culture of rewarded vulnerability, meaning that without consistent vulnerable interactions on a team, psychological safety can't happen. So "rewarded vulnerability" can't just be a theoretical concept, it has to have a tangible place in your workplace culture. Which means you have to actually be vulnerable at work, and encourage others to do the same.

So how do you create an environment where your culture can actually stick? You start with behavior in your organization's micro-cultures. If your team members can embrace concrete daily practices that model and reward vulnerability, you'll be well on your way to a consistent culture of psychological safety. It will become a sanctuary of inclusion and an incubator of innovation that'll become your greatest competitive advantage.

The 4 Stages of **Psychological Safety™**
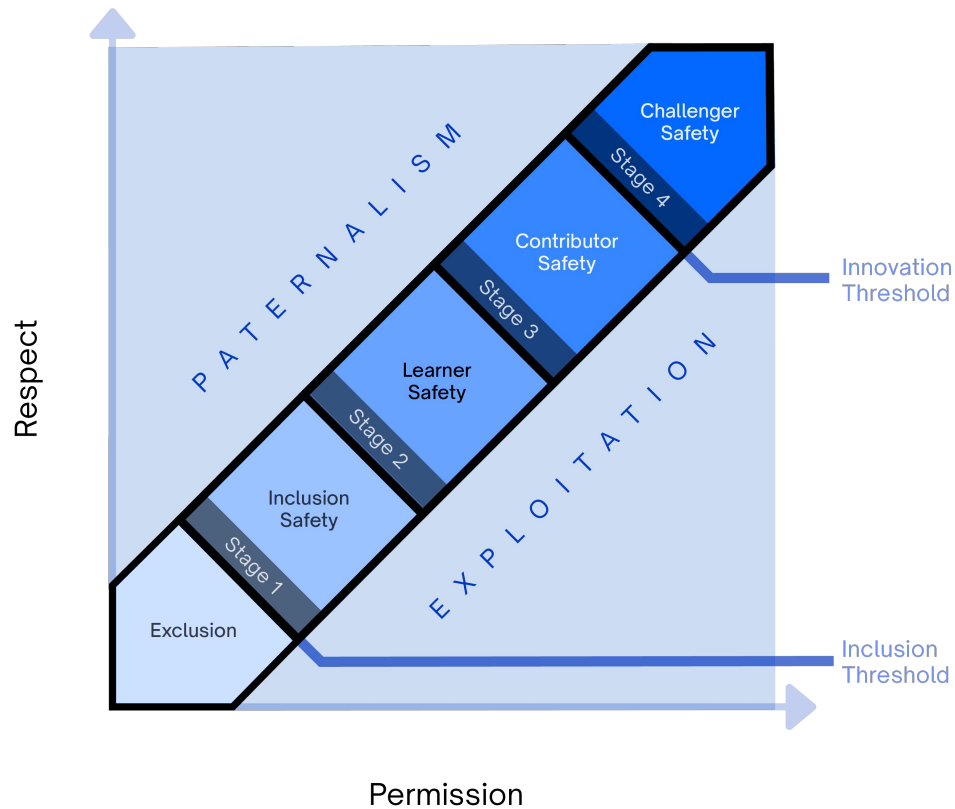
Psychological safety is built in four progressive stages, and we call this framework The 4 Stages of Psychological Safety™. It acknowledges that we're humans first and employees second and follows a universal pattern that reflects the natural progression of human needs in social settings. These needs exist across demographics, nations, and cultures.

Just like humans need water, food, and shelter to survive, teams that want to innovate need four things in order to thrive: they need to feel included and safe to learn, contribute, and challenge the status quo. Teams progress through these stages as they intentionally create cultures of rewarded vulnerability across The 4 Stages™ :

Stage 1 – Inclusion Safety:
Can I be my authentic self?

Stage 2 – Learner Safety:
Can I grow?

Stage 3 – Contributor Safety:
Can I create value?

Stage 4 – Challenger Safety:
Can I be candid about change?

The 4 Stages of **Psychological Safety**™

Stage	Definition of Respect	Definition of Permission	Social Exchange
1. Inclusion Safety	Respect for the individual's innate need to be included, accepted, and gain a sense of belonging.	Permission for the individual to interact and be their true and authentic self.	Inclusion in exchange for human status & the absence of harm.
2. Learner Safety	Respect for the individual's innate need to learn, grow, and develop mastery.	Permission for the individual to engage in the learning process and make mistakes.	Encouragement in exchange for engagement.
3. Contributor Safety	Respect for the individual's innate need for autonomy, and meaningful contribution.	Permission for the individual to work with appropriate autonomy and independence.	Autonomy with guidance in exchange for performance and results.
4. Challenger Safety	Respect for the individual's innate need to innovate and improve the status quo.	Permission for the individual to make challenges to the status quo in good faith.	Air cover in exchange for candor.

Clark, Timothy R. The 4 Stages of Psychological Safety: Defining the Path to Inclusion and Innovation. Berrett-Koehler Publishers, 2020.

Helping your team improve psychological safety.

It's not always easy to recognize when others are being vulnerable. To help you practice viewing your interactions through the lens of psychological safety, we'll share a framework that will help you make modeling and rewarding vulnerability second nature.

Model ⚙️⚙️ Reward

The L.I.V.E. Model for Teams

The L.I.V.E. model is an acronym you can use in your everyday life to assist you in remembering to model and reward acts of vulnerability. The acronym stands for (1) look (2) identify (3) validate and (4) encourage. Consistently modeling and rewarding acts of vulnerability increases the overall levels of psychological safety on your teams and improves the quality of your interactions.

1. Look
Look at the interactions and social dynamics around you.

2. Identify
Identify an act of vulnerability that should be rewarded.

L.I.V.E.

3. Validate
Validate the behavior so the person feels seen, heard, and understood.

4. Encourage
Encourage the person to continue modeling the vulnerable behavior.

How to Use The Behavioral Guide

This guide is meant to help you quickly move from the theory of psychological safety to actual practice. It's the companion to The 4 Stages of Psychological Safety by Timothy R. Clark, and your first stop on your way towards an actionable psychological safety initiative.

1

Choose one behavior from any of The 4 Stages.

Ideally, you'll choose a behaviors that will be relevant to your role and visible to your team. Remember, you don't have to pick one that will be debilitatingly difficult, but you should pick one that will benefit your team and improve its levels of psychological safety.

2

Decide how you'll both model and reward the behavior.

Make a list of places and interactions where you can model the behavior you've chosen. Be specific. Then think about your team. How can you reward their vulnerability as they model the behavior?

3

Record your plans and implement them for 7 days.

If you feel like you accomplished your goals after 7 days of practice, choose a new behavior and start again. If not, give it another go. What could you do differently this time around?

Stage 1
Inclusion Safety

What is **Inclusion Safety?**

Can you be your authentic self with your team? Inclusion safety satisfies the basic human need to connect and belong. As the first of the four stages of psychological safety, it serves as a foundation for the rest of the framework.

Team members who don't feel that they belong won't risk making a mistake or challenging the status quo. They won't step outside of their comfort zones, volunteer to take on more responsibility, or be vulnerable with their team. Without inclusion safety, teams can't learn and grow, contribute and perform, or speak up and challenge the status quo.

When it comes to inclusion safety, worth proceeds worthiness. Deserving inclusion safety has nothing to do with your personality or abilities, nothing to do with your gender, race, ethnicity, education, or any other demographic variable that defines you. You are worthy of inclusion just because of your inherent worth.

Top 5 Inclusion Safety Behaviors

- Listen and pause (page 8)

- Ask twice as much as you tell (page 8)

- Express gratitude and appreciation (page 11)

- Avoid comparisons and competition (page 9)

- Teach inclusion as a human need and right (page 8)

Top 5 Inclusion Safety Resources

Podcast Episodes

- Stage One: Inclusion Safety
- How to Bridge From Diversity to Inclusion

Blogs

- What is Inclusion Safety?
- Diversity is a Fact, Inclusion is a Choice

Webinars

- Stage 1: Defining the Path to Inclusion

Click to View

How do you help others feel included?

M ★

Teach inclusion as a human need and right. Inclusion isn't something we earn; it's something we're owed. Teach your team members to approach each other with the understanding that we are entitled to the human need to be included.

T **I**

Introduce yourself at the first opportunity. Be proactive to introduce yourself to those who are new or you don't know. Once you break the ice and display warmth and acceptance, people will believe they belong.

T **I**

Learn peoples' names and how to pronounce them. Nothing is more personal than a name. When a new person joins the team, learn their name immediately. If you don't know how to pronounce it, ask.

I

Physically face people. Your job, whether you're speaking or listening, is to be actively engaged in that conversation. Face people directly and look them in the eyes. Without knowing it, your communicating deep validation, value, and belonging.

I ★

Listen and pause. Have you ever been talking to someone and you can tell that they're simply waiting for you to finish your sentence so they can jump in? Listen with intent to comprehend rather than the intent to respond. Do this by listening, pausing to reflect, and then responding thoughtfully.

M ★

Ask twice as much as you tell. When you ask someone a question, it's an invitation to engage and a form of validation. Telling can be fine too, but if you tell too much, it's self-serving and it signals selfishness, arrogance, and dominance, all of which are off-putting.

How do you help others feel included?

(M) **Conduct hop on, hop off tours.** Have you done a hop on/hop off tour on one of those buses? Do the same thing when someone joins your organization. Have a personal guide give social tours to accelerate relationship-building. Make sure those interactions are meaningful enough to move the relationship beyond the acquaintance stage.

(M) **Meet a person in their physical space.** Don't make them come to you. This sends a clear message that you value them, their time, and their input because you are extending yourself on their behalf. People feel more comfortable to engage in their own space, which will lead to higher quality interactions.

(T) **Move to mutual discovery quickly.** Ask your colleagues questions to discover their personal interests and find common ground. Don't probe into personal or sensitive topics, just ask natural questions about their background and interests. Once conversation doesn't feel like an obligation, everyone will feel more included.

(T) **Create deep bonding opportunities.** When a new team member arrives, that individual needs warmth and civility to feel comfortable. Then you need to move from creating comfort to creating a real sense of belonging. Find projects that allow individuals to spend significant time together to develop inclusion.

(T) ★ **Avoid comparisons and competitions.** We lose the ability to connect when we compare and compete with each other. Identify and recognize the talents, and abilities of each person and point them out. Celebrate the strengths of others, especially when they are strengths you may not possess.

(M) **Define and communicate the purpose and values of your team.** To feel a part of the team, the individual must understand why the team exists, how it works, and what it stands for. The team must first define its values, purpose, and goals and continuously communicate those things to team members.

(I) **Identify negative bias.** A bias is a preference for or against a human characteristic, individual, or group of people. As humans, we all have them. Sometimes they're hidden, sometimes they're obvious. Periodically ask team members if they can identify any patterns of negative bias in the team, then act to remove them.

(M) **Check alignment.** Both the sense of belonging that each person feels and the sense of alignment the entire team feels are delicate and dynamic, not permanent. Pull members of the team aside informally and ask them how well they understand the vision, purpose, and goals of the team, and how committed they are to achieving them.

(M) **Conduct frequent, brief touchpoints.** Humans are hyper-social creatures, born to connect. Short, frequent interactions are far more effective than long but infrequent ones. It's the frequency that builds and strengthens the connection.

(I) **Share your story, learn their story.** Build rapport by sharing appropriate background and experiences about your life. Be the first to expose yourself emotionally. Then invite the other person: "Tell me your story."

How do you help others feel included?

(I)(M)

Don't flaunt perks or status symbols. You might have certain perks that come with your role title, like office size, parking privileges, or compensation structure. People are sensitive to differences and might assume they indicate who they can and can't interact with. There will always be differences. Just don't call undue attention to them.

(T)

Create opportunities to socialize outside of work. When we remove the work agenda from our conversations, we come to know and appreciate each other much better, which allows us to collaborate more effectively when we come back to work.

(I)

Avoid exclusive patterns of social interaction. Reach out to team members that you don't normally talk to. Do you interact with the same few people socially? What's keeping you from branching out? Be democratic with your time and attention. Make an effort to include people that aren't in your immediate circle.

(M)

Avoid self-serving references to status. In any hierarchy there are differences in roles and responsibilities. Sometimes we assume that those differences also determine our value and importance based on status. Make an effort to minimize those differences and create a feeling of equality between you and other team members.

(I)

Follow through on small commitments. If you make a commitment, follow through, especially if it's a small one. Sweating the small stuff is an expression that you respect and value others.

(M)

Forbid personal attacks. People make mistakes, fail, and often get things wrong, but that's never a justification for a personal attack. Your team members are still entitled to respect and the permission to participate. Call out any comment or behavior that could make a person feel marginalized or disrespected.

(M)

Never hide behind title, position, or authority. Titles are just artifacts an organization gives you to get work done. Don't confuse them with your own identity. If you hide behind these things out of insecurity, it creates a barrier to inclusion.

(I)

Respond to messages promptly. In part, the timeliness of your response communicates your respect for that person. Although there are times that justify a delayed response, try to respond promptly to those who message you. When you are consistent in your response pattern, you communicate inclusion.

(I)

Control nonverbal cues. Your team members will read your body language as much as they listen to what you say. Be careful that you don't send nonverbal cues that communicate exclusion. Examples include rolling eyes, fidgeting or drumming your fingers, looking bored, or allowing yourself to be distracted in the middle of a conversation.

How do you help others feel included?

(I)

Use appropriate humor as a relief valve. When the pressure mounts and people are feeling the stress, look for ways to relieve that stress with humor. Pointing out silly or ironic things, your own mistakes and inadequacies in a humorous way can relieve pressure in a healthy way while still affirming the value of people.

(M)

Ask about needs and challenges. Your team members probably won't say anything when they're experiencing a problem or challenge. Sometimes those needs are job-related. Sometimes, they are more personal. People often simply need to be asked before they open up and give you the opportunity to offer your support.

(I) (M)

Ask for feedback and help. When you run into a problem or challenge, don't be afraid to ask others for help. This does two things: It acknowledges the fact that you're human and you need help. Second, it gives others a legitimate opportunity to help you in a meaningful way.

(T) (I) (M) ★

Express gratitude and appreciation. Your team members aren't included and excluded as members of your team on the basis of success and failure. When team members perform well, express genuine gratitude and appreciation. When they try hard, but fail to meet their goals, recognize their efforts with empathy.

(I)

Avoid digital addiction and overdose. We're flooded with ways to connect. Some bring a sense of real inclusion, while others leave us feeling alone. Ask yourself and the members of your team: Which connections leave you feeling depleted? Which connections leave you feeling energized with a real sense of inclusion?

(T) (I) (M)

Reinforce inclusion daily. The sense of inclusion that people feel on a team is fragile. Even when it's not broken, it will fade away with time if it's not strengthened. The perishable nature of inclusion requires constant reinforcement. Talk about inclusion often, and make sure people know the concept is important to you.

Measure your levels of inclusion, learning, performance and candor.

Confidently target the right problems and show measurable initiative success with The 4 Stages Survey.

Learn More

	4 Stages Score	Inclusion Safety Score	Learner Safety Score	Contributor Safety Score	Challenger Safety Score	Participation
Margarita Eulalia's Team	97	100	89	100	100	100%
Amely Verla's Team	83	100	89	100	44	38%
Harley Ewell's Team	60	79	75	58	29	100%
Stanley Rachel's Team	52	58	58	42	50	57%
Christian Elfrieda's Team	46	25	67	58	33	100%
Mathilde Maurine's Team	38	47	63	37	3	97%
Elouise Effie's Team	33	39	27	52	12	80%
Karli Chet's Team	27	42	42	58	-33	67%
Margaret Sierra's Team	37	47	40	40	20	50%
Karli Chet's Team	27	42	42	58	-33	67%
Jalon Milford's Team	6	-11	33	0	0	43%
Alessandro Lila's Team	-14	0	-22	-11	-22	60%

Your 4 Stages Survey
1st Survey

Stage 2
Learner Safety

What is **Learner Safety?**

Do you have the space to grow? Learning and growing is a fundamental need that needs to be satisfied in order for innovation to flourish in an organization. In this stage, fear is detached from mistakes, and mistakes are rewarded as part of the learning process.

As we get older, we lose opportunities for formal learning and rely on creating our own informal learning experiences. However, when we fail to offer the necessary resources and encouragement for learning, we communicate that learning isn't as valuable as performance.

When it comes to learning, the goal for all organizations is the same: to achieve learning agility. Learning agility is the ability to learn at or above the speed of change. If learning agility is less than the speed of change, businesses, organizations, and individuals fall behind, become stagnant, and become irrelevant. Our job is to help our colleagues learn when they're not in a formal structured learning environment.

Top 5 Learner Safety Behaviors

- Share what you're learning (page 14)

- Frame problems before you solve problems (page 15)

- Share past mistakes (page 15)

- Dedicate time and resources to learning (page 17)

- Adopt a student mindset (page 14)

Top 5 Learner Safety Resources

Podcast Episodes

- Stage Two: Learner Safety
- Learning: Maintaining Your Competitive Advantage

Blogs

- What is Learner Safety?
- How to Promote Psychological Safety as an Early Adopter

Webinars

- Employee Engagement and Psychological Safety

Click to View

How do you help others feel safe and motivated to learn?

(M)

Unite your team with learning. Learning is a highly individual process, but can also be richly collaborative. It shouldn't be a divisive competition. Don't allow learning to divide people, pitting them against each other in unhealthy ways. Encourage everyone to participate in the learning process by demonstrating compassionate curiosity with each other.

(M)

Assess the learning style and temperament of each person. Each of the members of your team has a different learning approach and disposition. Your task is to understand the learning patterns of each individual on your team. Do this by observing them and asking them about their learning preferences.

(I) ★

Share what you're learning. One of the most powerful ways to encourage others to learn is to share what you're learning. Share the topic, the insights, and most importantly, the joy and satisfaction you have gained in the learning process. Your optimism and enthusiasm for learning is contagious.

(I) (M) ★

Adopt a student mindset. Use the word student with your team. Students approach learning with humility and consistency and avoid complacency and arrogance. Help them understand that although we may develop expertise, we're always learning and will never arrive at a place of permanent competency.

(M)

Help people one-on-one in their space. You may have some team members that are reluctant to "learn publicly" in a group setting. Work with them one-on-one in their space or in a neutral space that is comfortable to them. Your goal is to take away the inhibition and anxiety that they associate with learning.

(M)

Invite your team to learn. Some members of your team will be aggressive in their learning habits, and others will be tentative. Sometimes all a person needs is an invitation to be a part of the learning process. Identify questions, problems, or challenges that you can give to your more tentative team members as learning assignments.

How do you help others feel safe and motivated to learn?

(M)

Invite others to share their roles. Because people take pride in what they do, it's almost always true that people like to talk about their individual roles. Invite the members of your team to explain their roles or share something they've recently done in their role and how it influences your other team members. Let your team learn from each other.

(M)

Ask for help from those in different roles. Model humility in learning by asking for help from those who work outside, or under, your role. This gives the other person the chance to teach and be helpful which leads to increased confidence and engagement.

(M)

Reinforce learning potential. The learning potential of your team is unknown and unknowable. Consistently remind your team that to earn their living is to learn their living. Ask members of the team what new thing they learned during the week that they are now implementing in their work.

(T) (M)

Ask questions to activate learning. Asking a question is the activator that starts the learning process. When we ask a question, we catalyze the learning process for ourselves and those whom we ask. Encourage team members to ask meaningful questions to push their thinking, skills, and experience.

(I) (M)

Share your personal learning goals. Set the example by setting and sharing your own learning goals with your team. Think about technical and non-technical learning goals. Your example will often motivate other team members to set and pursue their own goals.

(T) (I) (M) ★

Share past mistakes. It's hard to learn from mistakes if a team has a culture that hides its mistakes. Take the opportunity to mention some of your mistakes, laugh at them, and share what you learned from them. This will encourage others to be more comfortable sharing their mistakes, learning from them, and moving forward.

(T) (M) ★

Frame problems before you solve problems. Teach your team to frame problems before they solve problems. Otherwise, we often end up solving the wrong problem. Find a problem and say, "I'd like you to help me frame this problem, not solve it. I want to make sure I'm defining the problem correctly first."

(I) (M)

Formulate questions. Asking thoughtful questions requires thought and preparation. In fact, it's part of the learning process itself. The next time you tackle a problem with your team, ask them to take 10 minutes to formulate a set of questions to ask about the issue before you begin discussing the issue itself.

(M)

Implement rotating mentoring. Rotating mentoring is a system in which members of the team have a monthly 45-minute mentoring session with a different individual outside of the team. This provides a concentrated learning opportunity for the individual to learn from someone with a different perspective, skills, and experience.

(M)

Help team members set learning goals. Individuals learn more effectively and consistently when they have set clear goals about what they want to learn. Encourage your team members to set concrete and time-bound learning goals. Help them find goals might be appropriate given their roles, responsibility, and aspirations.

How do you help others feel safe and motivated to learn?

M

Explain formal vs. informal learning. Most of the learning we do in life is informal. Once we finish any formal schooling, we spend very little time in structured learning environments. Help your team members understand that in the long run their personal informal learning habits will make all the difference.

I **M**

Identify and share what you unlearn. In a dynamic environment, our knowledge, skills, and experience can become obsolete. Identify the times when you see this happening to you. Point it out to others. Acknowledge that you are in a cycle of unlearning and relearning.

M

Remove learning obstacles. Analyze the learning environment of your team and identify any obstacles that to their learning process. Maybe a team member needs the right colleagues or better resources. Determine how to enhance the learning conditions for each person on your team.

T **I** **M**

Embrace quality feedback. Demonstrate a pattern of embracing quality, actionable feedback from any direction. Be agnostic to a person's title, position, or authority. Focus on the substance of the feedback. If it's worthwhile, let others see you embrace it. Even if it isn't, be gracious and appreciative to the person who gave it.

I

Model an example of taking notes. Taking notes is perhaps the most obvious outward sign that a person is actively learning. Whether on paper or an electronic device, take notes. Capture facts, insights, and observations that you want to remember and ponder later. This habit will influence others to do the same.

T **M**

Ask for feedback at the moment of need. It's normal to encounter questions, problems, or challenges in the course of normal workflow. Unless there's an obvious solution, teach your team to engage in collaborative learning and formulate a learning response (not an answer) to the problem and then ask a colleague to give feedback (not an answer).

M

Provide unwavering support through the low points. As your team members progress through learning cycles, they will often encounter points of discouragement. When this happens, provide extra support to keep their efforts moving forward. Find evidence of progress that you can point out to them, however small they may be.

How do you help others feel safe and motivated to learn?

(M)

Assign action learning projects. Assign a small group or sub-team a real and meaningful problem to solve. Provide clear objectives, timeline, resources, and ground rules for solving the problem. Have the team present their recommendations in a formal setting. Adopt the suggestions if they makes sense, and recognize those who participated.

(M) ★

Dedicate time and resources to learning. If you talk about the importance of learning but don't dedicate any time or resources to it, it's really not a priority. Formally allocate budget and dedicate time to learning. There's no perfect approach. Just make sure that you offer everyone consistent resources and time.

(I) (M)

Admit your ignorance and say "I don't know." When we step out of our areas of competency, we often feel insecure. It's refreshing to your team if you can confidently acknowledge your ignorance in areas that go beyond your know-how. When you gracefully acknowledge your own limitations, others will learn without fear.

(M)

Challenge your teams with hard problems. Customize the learning process based on the needs of each individual. For team members who are confident, capable, and aggressive learners, challenge them with hard problems, problems they may have no idea how to solve. Check in regularly to provide appropriate coaching and guidance.

(T) (M)

Incorporate a daily learning segment. Learning doesn't have to take long. In fact, micro-learning segments can take as little as five minutes. Make it a habit to do short learning segments in your regular meetings. Rotate the assignment to teach among all team members.

(T) (M)

Celebrate failures. Failure is evidence that an individual is learning through trial and effort. As long as team members fail within defined limits, you should encourage this behavior. When a team member fails and learns from it, celebrate it. Destigmatize failure and create a culture where failure isn't an accident, but is seen as the way forward.

(T) (I)

Acknowledge that learning is "error-driven." If you aren't making mistakes, you aren't learning. Be intentional in how you talk about others' development and education, as well as your own. They aren't going to get it right the first time, that's how you know that learning is happening.

(I)

Demonstrate patience and empathy. People often stop learning when they meet a harsh, critical, indifferent, or sarcastic response in the learning process. Avoid demeaning, belittling, or disrespectful response patterns that increase personal vulnerability and shut off the motivation to learn. Show empathy instead.

(T)

Establish a book/video/podcast club. To create incentives for additional learning, create a book/video/podcast club and provide monetary and non-monetary incentives for team members to consume content on topics that are relevant to the work of the team. Have team members share their insights and lessons as they learn.

(M)

Communicate a vision of potential. People often can't see their potential. Help them see what they can become if they will maintain a disposition for continuous learning. If they keep learning, their vision of themselves will catch up with the potential that you already see.

How do you help others feel safe and motivated to learn?

M

Encourage the emotional side of learning to build confidence. The learning process is both intellectual and emotional. You can't pull them apart. The emotional state of a person influences their desire and ability to learn. As a leader, encourage both the head and the heart to want to learn.

I

Be a self-sufficient learner. It's crucial that you learn how to learn in informal settings. Never become dependent on an organization or other people to tell you what to learn, why, or how. Set an example of aggressive, self-directed learning by sharing your personal learning goals and plans.

M

Teach the concept of learning agility. Learning agility is the ability to learn at or above the speed of change. If you emphasize and model this concept, you reduce the sense of risk your team members feel when they engage in the learning process. They need to be convinced that not taking learning risks is a greater risk than taking them.

I **M**

Journal your learning observations. As you lead your team, you naturally observe their work patterns, but do you observe their learning patterns? Write down your observations. They'll serve as a benchmark and will help you be more deliberate and purposeful in your efforts to enhance the learning patterns of your team.

Transform culture at the team level.

Measure your team's current cultural impact and equip them with the tools, shared language and understanding they need to make lasting change.

Learn More

4 Stages Survey Results

Results By Stage

-29	29	-5	-14
Stage 1 Inclusion Safety	Stage 2 Learner Safety	Stage 3 Contributor Safety	Stage 4 Challenger Safety

Contributor Safety

What is **Contributor Safety?**

Can you create value for your team? Contributor safety satisfies the basic human need to make a difference and offer meaningful contributions. When we create contributor safety for others, we empower them with autonomy, guidance, and encouragement in exchange for effort and results.

When you have contributor safety in your organization your team thrives under outcome accountability. Roles are clearly defined, but people are encouraged to think outside of their roles. Small wins are celebrated. When you don't, autonomy is given with little to no guidance, and team members may feel like benchwarmers.

If your teams want autonomy, they have to learn to love accountability. Unearned autonomy with no accountability can lead to disorder, discomfort, and dissatisfying results. On the other hand, too much accountability with no autonomy can lead to micromanaging, hand-holding, and paternalism.

Top 5 Contributor Safety Behaviors

- Celebrate small wins (page 21)

- Ask people what they think (page 24)

- Shift from tell to ask (page 22)

- Help others see their strengths (page 23)

- Recognize accomplishment (page 21)

Top 5 Contributor Safety Resources

Podcast Episodes
- Stage Three: Contributor Safety
- Accountability: Owning Your Outcomes

Blogs
- What is Contributor Safety?
- Contributor Safety: Four Models to Shape Your Thinking

Webinars
- Stage 3 Contributor Safety: How to Unleash Contribution Through Psychological Safety

Click to View

How do you help others feel safe to contribute and make a difference?

T **M**

Rotate the conducting of meetings. Traditionally, the leader conducts the meeting, but if you rotate that assignment, your team members will gain greater confidence to contribute. Giving them an assignment acknowledges their ability to do the job. Remember, you may need to coach them through the process.

M ★

Recognize accomplishment. Certainly accomplishment is its own reward, but receiving genuine recognition from your peers makes it all the sweeter. As a leader, recognize the successes of your team quickly. Never delay or resent the opportunity to show genuine excitement for their accomplishments.

M

Identify stall points. There are times when your team members don't know what to do or how to proceed, and they may be embarrassed to ask what to do. Notice when this happens. Rather than making them feel poorly about it, engage with them, ask them what they think the next steps should be. Make it safe for them to be in this stalled situation.

T **M**

Clarify roles. More complexity requires greater teamwork, and more role ambiguity causes people to make assumptions about how to contribute. Clarify roles at the beginning to reduce both anxiety and ambiguity. You will need to do this periodically to ensure role clarity.

I **M**

Don't correct with anger, blame, or shame. Things won't always go right. Sometimes mistakes are due to complacency and carelessness. Even in that situation, don't correct with anger, blame, or shame. Even candid, corrective feedback can be given respectfully.

T **I** **M** ★

Celebrate small wins. Small wins increase confidence and build momentum. When your team members see a series of small wins, it creates a sense of forward motion. Ultimate success may be a way off, but it's the small wins that fuel the team members' efforts to continue contributing at a high level.

How do you help others feel safe to contribute and make a difference?

(M) ⭐

Shift from tell to ask. A leader's coaching continuum ranges from telling at one end to asking at the other. A good leader uses the entire continuum. Too much telling breeds dependency and learned helplessness. Shift as much as you can to the ask end. Lead through questions more than answers.

(T) (I)

Share your workstyle and communication preferences. Beyond your values, share your workstyle and communication preferences with your team. Have your team members share theirs as well. The better you understand the preferences of your team members, the more effectively you'll be able to work together.

(M)

Create conditions for peak engagement. We've all had peak engagement experiences in professional life, times when we're in the groove and doing your best work. Have your team reflect on and share their peak engagement experiences, then work to create peak engagement conditions for each other.

(M)

Shape the experience. There are of course limits and constraints, but help shape the team experience for each member as much as you can. Customize, personalize, and tailor the experiences based on the preferences of the individual. There are often neglected opportunities to shape work and boost contribution.

(M)

Avoid boredom and burnout. Boredom and burnout are the two ends of the engagement spectrum. Both are destructive and unsustainable. As a leader, it's your job to monitor the contribution of your team and help them avoid both. Encourage team members to work hard, reap the rewards, and find renewal in the process.

(I)

Share your values. Your values define you and what's important to you. They always define the way you want to work. Share your values with your team and have them share theirs with you. This is the first important step in defining the ground rules and terms of engagement for a team.

(T)

Align work with passion. Passion is an intense desire or enthusiasm for something. Where do you find passion in what you do? Have your team members share the sources of their passion. To increase and sustain contribution, try to make work assignments that align with the individual passions of your team members.

(T) (M)

Set ground rules. After sharing your values, set practical terms of engagement with your team tied to your values. Once team members know the ground rules, they will be more likely to engage because they know what's expected.

(M)

Give stretch assignments. Move your people out of their comfort zones. We build our capacity to contribute when we're stretched and out of our comfort zones. Don't stretch so much that it becomes destructive. Give your team members stretch assignments, but do it in a way that the exhilaration outweighs the discomfort.

(M)

Distinguish ability vs. motivation problems. When contribution begins to lag, your first task is to understand why. Ask: Is this an ability problem or a motivation problem? Ability problems need increased skills, knowledge, and experience. Motivation problems need understanding, confidence, self-efficacy, and accountability.

How do you help others feel safe to contribute and make a difference?

(M)

Paint the vision. A vision is a portrait of the future, a seedling of reality, a destination that hasn't yet been achieved. A compelling vision provides excitement, enthusiasm, and line-of-sight understanding that connects our personal contribution with a desired end state.

(T) (I) (M) ★

Help others see their strengths. Many team members deliver mediocre performance because they don't realize their strengths. Identify the hidden or undervalued strengths that your team members have and bring them to their attention. This will ignite the desire to contribute more.

(M)

Give people the why. The strongest driver of engagement and performance is when we find meaning and purpose in the work we do. Team members often have a hard time connecting the work they're doing with a larger and more significant purpose. Help them understand that they're contributing to something worthwhile.

(I) (M)

Own your own contribution. Team members are responsible for their own contribution and have three options: (1) Accept what they've been given, (2) Change and improve what they've been given, (3) Leave what they've been given. Emphasize that they'll have the direction, resources, and support they need, but your role is secondary.

(T) (I)

Remove a sense of entitlement. The most entitled team members are generally not contributing all they could. Their sense of entitlement gets in the way and leads them to believe that others should be doing more for them. We owe each other psychological safety, and are entitled to little else.

(T)

Keep focused with tradeoffs. Teams that lack a clear focus become confused, lose steam, and dilute their efforts. Keep your team focused by saying no to other options and priorities. Your success is based on the allocation of scarce resources, so protect your team's focus using strategic tradeoffs.

How do you help others feel safe to contribute and make a difference?

(T)

Make the team customer-centric. Every team has a customer. When a team loses sight of its customer, it often becomes careless, jaded, cynical, and loses pride in its work and contribution. Keep the customer in front of the team. Communicate and collaborate with the customer's goals and satisfaction in mind.

(I) (M)

Let them do it their way. Human beings want to make a difference in their own unique way. Delegate with clear expectations and then get out of the way. Allow your team members the creativity and independence to approach things as they see fit. If you micro-manage them, you will extinguish their motivation to contribute.

(T) (M)

Measure performance. When our contributions aren't measured we get discouraged or lose interest in what we're doing. Make sure you have meaningful metrics for the areas of contribution that really matter. Keep in mind that you can discourage your team if you're measuring too many things, which causes you to lose a sense of priority.

(T) (M)

Approach failure with curiosity rather than criticism. When performance falters, it means our inputs are not producing the outputs we expected. When this happens, approach your team members with curiosity rather than criticism. Diffuse the stress and emotional tension that often surrounds poor performance.

(T) (M)

Clarify the decision-making process. There are three basic ways to make a decision with a team: (1) Unilateral, (2) Collaborative, (3) Consensus. Ensure that your team members understand their roles in the decision-making process so they know how to contribute appropriately and confidently.

(T) (I) (M)

Compliment participation from quiet team members. Some team members aren't comfortable participating in a formal group setting. And yet the team needs their real-time input to solve problems and create solutions. Compliment and encourage that behavior without bringing too much attention to them.

(T) (I) (M)

Avoid shutdown statements. Some team leaders use statements such as, "bad idea," "nice try," or "I told you so." Those statements stem from ego and insecurity and quickly trigger the self-censoring instinct of team members. Avoid statements that shut down rather than draw out the discretionary effort of your team members.

(I) (M)

Report your own mistakes and errors. Leaders that do so earn deep trust with their teams and discourage team members from hiding errors. The leaders who share their mistakes are acknowledging what we all know, that humans make mistakes. Teams that follow this behavior can correct mistakes and increase contribution more quickly.

(T) (I) (M) ★

Ask people what they think. Ask a team member, "What do you think?" Those four simple words invite contribution and increase confidence in the process. Don't say those words when you don't really mean it. At the same time, don't move to a decision or action without asking, even if you think you know the right answer.

(M)

Check skills and resources. For your team members to contribute effectively, they'll need the skills and resources to do the job. It's your job to ensure that they can do their job. Sometimes, team members don't have the skills or resources to do the job even when there's a ready solution to solve the problem.

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Learn More

How do you help others feel safe to contribute and make a difference?

M

Accept bad news. Bad news is part of the experience of every team. Show your team that you want to hear bad news because it's a measure of performance, and performance can't improve until we know and accept where we are today. You may be disappointed, but express appreciation to those who bring bad news.

M

Reward those who accept additional responsibility. Taking on additional responsibility means greater performance expectations and more stress. It also means the opportunity to make a greater contribution. Praise and reward your team members who take on more responsibility willingly. Help them recognize when they're taking on too much.

M

Create outcome accountability. Accountability happens at three levels: (1) task, (2) process, and (3) outcome. Create a cultural expectation that you want team members to move to outcome accountability and have maximum autonomy and ownership for what they do, how they do it, and the results they get.

M

Teach the compounding principle. Often your team members may not think their contributions are amounting to anything. Help them understand that big contributions are incremental, and often you can't recognize their effects early on. Praise their consistent efforts, especially when there are no visible signs of success.

Stage 4
Challenger Safety

What is **Challenger Safety?**

Do you feel like you can be candid about change? Challenger safety satisfies the basic human need to make things better. It's the support and confidence we need to ask questions such as, "Why do we do it this way?" "What if we tried this?" or "May I suggest a different way?"

Challenger safety allows us to feel safe to challenge the status quo without retaliation or the risk of damaging our personal standing or reputation. As the highest level of psychological safety, it matches the increased vulnerability and personal risk associated with challenging the status quo.

Challenger safety gives team members a voice to speak up when there is an opportunity to improve. People can disagree productively. When we create challenger safety, we give air cover (protection) in exchange for candor. When you don't have challenger safety teams fall silent and people are punished for their bravery and candor.

Top 5 Challenger Safety Behaviors

- Weigh in last (page 28)

- Encourage others to think beyond their roles (page 28)

- Take your finger off the fear button (page 28)

- Respond constructively to disruptive ideas & bad news (page 28)

- Model the art of disagreement (page 29)

Top 5 Challenger Safety Resources

Podcast Episodes

- Stage Four: Challenger Safety
- Competitiveness and Innovation

Blogs

- What is Challenger Safety?
- High-Performing Teams Need Psychological Safety

Webinars

- Why Psychological Safety is Oxygen to the Agile Movement

Click to View

How do you help others feel safe to innovate and make things better?

M ★

Take your finger off the fear button. Fear triggers a self-censoring instinct that causes people to retreat into silence. When a leader uses fear, it's normally a punitive response borne of frustration and insecurity. More importantly, it's an abdication of leadership.

I M

When you reject feedback, explain why. When you reject a team member's input or suggestion, explain why you didn't adopt it. Your considerate response will embolden the individual to continue giving feedback.

T M ★

Encourage others to think beyond their roles. Inviting your people to venture out of their tactical and functional silos creates more opportunity for divergent thinking and allows them to connect things that aren't normally connected. Manage the process carefully and discern when constructive dissent is giving way to destructive derailment.

T I M ★

Respond constructively to disruptive ideas and bad news. Your positive emotional response to disruptive ideas and bad news is a clear signal that you have a high tolerance for candor and will protect your people in their right to dissent.

M ★

Weigh in last. Speaking first when you hold positional power softly censors your team. Listen carefully, acknowledge the contributions of others, and then register your point of view.

T I M

Reward vulnerability. Remember, challenger safety must protect the individual and the team at the highest point of personal and interpersonal vulnerability. It's about generating and harnessing diverse perspectives (and even disagreement) without emotional escalation and destructive social friction.

How do you help others feel safe to innovate and make things better?

(M)

Challenge your own decisions. Leaders make decisions that are right today and then wrong tomorrow. Openly discuss some of the decisions that you've made to demonstrate that even correct decisions aren't correct forever. Help your team know that you are willing to revisit old decisions, courses of action, and points of view.

(T)

Look for R.O.T. Everything we do eventually becomes obsolete. Every source of competitive advantage we have is temporary. Engage your team to look at the way you do things. Identify anything that is redundant, obsolete, or trivial (R.O.T.). These sources represent the low-hanging fruit of the status quo that needs to be dismantled.

(M)

Teach deliberate vs. emergent strategy. Deliberate strategy is the formal, long-term strategy that we are all familiar with. But when that deliberate strategy meets reality, it's riddled with flaws. Emergent strategy, on the other hand, is the process of adapting your strategy real-time in the context of a dynamic environment.

(M) ★

Model the art of disagreement. Having challenger safety means that the members of your team can debate issues on their merits and find the best one without creating fear and interpersonal conflict. It's your job to teach them how to have marvelous disagreement to create this idea meritocracy.

(T) (I)

Share challenge experiences. You can't remove all of the risk associated with challenging the status quo, but you can eliminate much of it simply by sharing your own successful challenge experiences. Identify the best examples from your professional life and share them with your team at opportune times.

(T)

Identify tangible and intangible sources of value. When we challenge the status quo, it means we have an idea about how to create more value, either tangible or intangible. Tangible value might come in the form of design, comfort, durability, or ease of use. Intangible value might come in the form of prestige, security, or reputation.

How do you help others feel safe to innovate and make things better?

(I)

Model vulnerability. Remember that vulnerability is exposing yourself to the possibility of harm or loss. If you model and reinforce a pattern of vulnerability, others will do the same.

(T) (M)

Reward shots on the goal. Reward your team members with recognition and enthusiasm when they attempt to challenge the status quo. Not all ideas and suggestions will have merit, but if you encourage the attempts, those shots will increase.

(M)

Mandate a no-interruption rule. As the leader, model and mandate a respectful and collaborative temperament and set of rules to make them everyday behaviors. Mandate a non-interruption rule in group discussions. That rule will empower team members with the respect and permission they need to challenge the status quo.

(T)

Break before breakdowns. When interpersonal dynamics start breaking down, immediately take a break. Don't let social friction shut down intellectual friction. When the team gets tired, it's easy for social friction to increase. Take a break when you see this happen. Refresh the team before you come back together.

(M)

Create diverse teams. Assign diverse people with diverse perspectives to work together on meaningful projects. Diverse teams possess cognitive diversity and naturally produce divergent thinking.

(M)

Define what is in and out of scope. Define what can and should be challenged based on the team's defined scope of activity. This will avoid needless frustration that results when team members challenge out-of-scope or irrelevant issues.

(I)

Identify and avoid defensive routines. Defensive routines are the things we do and say to avoid potential threats and embarrassment. Gain the team's permission to identify defensive routines at the earliest opportunity. This will help activate new behaviors that promote a higher tolerance for candor.

(M)

Ask for bad news. This may seem counter-intuitive, but asking for bad news is a way of speeding up the process of identifying areas for experimentation and innovation. When there's bad news, it allows us to challenge the status quo more easily because something is already broken or not working right.

(T) (M)

Tee up challenge-the-status-quo questions. Ask your team one challenge-the-status-quo question at the end of the day and ask them to ponder that question with the expectation to discuss it the next day. Hold a short meeting the next day and have each person share their thoughts.

(M)

Praise quantity over quality in brainstorming. Brainstorming research clearly shows that the best approach to brainstorming is to generate ideas rather than focusing on the quality of those ideas. Unconstrained thinking is the vehicle to the best solutions, don't limit or constrain the process.

How do you help others feel safe to innovate and make things better?

T **I**

Put a hypothesis on the table. Invite the members of your team to bring hypotheses to the table. A hypothesis is a proposed explanation about why things are the way they are. This is a healthy, apolitical way of putting an idea or challenge on the table.

M

Protect your team from groupthink. When team members start to think alike, we call that groupthink. Team members worry more about fitting in with the group's conventional thinking instead of performing the hard labor of critical thinking. Say, "I don't want an echo chamber. What's another way to think about this?"

M

Scan the environment for adaptive challenges. Teams and organizations have to respond to three kinds of adaptive challenges: (1) Opportunities, (2) Threats, and (3) Crises. Opportunities offer potential benefit. Threats offer potential harm. Crises offer certain harm. Scan for each and determine how to respond.

T

Identify inflection points. An inflection point is a turning point. Teams have the responsibility to identify, interpret, and respond to inflection points that might have an impact on what they do. Lead your team in a discussion to ask: What's beginning to change? What does it mean to us? What should we do about it?

T

Engage in recombination. Challenges to the status quo often come as the natural result of connecting things that we don't normally connect. Hold a recombination session. Take one thing and combine it with a host of other things that you wouldn't normally think of connecting. Try some outlandish combinations just to see what happens.

T

Hold a "do-nothing scenario" session. To put the status quo to the test, bring your team together and propose a do-nothing scenario. Think through the consequences of preserving the status quo instead of changing it. Mention both planned intended and proposed unintended consequences and show that keeping the status quo often higher risk than changing it.

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How do you help others feel safe to innovate and make things better?

(T) (I)

Recognize patterns. Before we can challenge the status quo with a credible idea or suggestion, we need to identify a pattern of cause and effect that we think we can improve. Teach the members of your team that they are in the pattern-recognition business.

(I)

Identify your status quo bias. A status quo bias favors what we believe is the right thing and the best way. When our status quo bias is strong, we stop looking for ways to improve things. Ask your team, "What would you do if there were no status quo and we could start fresh? How would you do it?"

(T) (I)

Come with half-baked questions and raggedy solutions. You've heard leaders say, "Don't come to me with questions. Come to me with solutions." That's nonsense. Encourage your team to come to you with unrefined thinking. If you expect polished and tested questions and solutions, be prepared to wait a long time.

(M)

Respect local knowledge. When you talk to one of your team members, view them as the expert. They have access to local knowledge, context, experience, and relationships that you don't. Respect that local knowledge and be willing to solicit and circulate it throughout the team.

(M)

Bring in outsiders. It's one thing to have diversity of thought within your team, but it's still typically within a narrow range. Bringing in outsiders can recharge your team with energy and fresh thinking. It can explode your assumptions and elevate your vision. It can push out the limits of what you believe is possible.

(I)

Follow the disruption question sequence. An effective way to challenge the status quo is to use the disruption question sequence. Begin with a "why?" question. Move to a "what if?" question. End with a "how?" question. Model and teach the members of your team to implement this three-question process.

The 4 Stages Book

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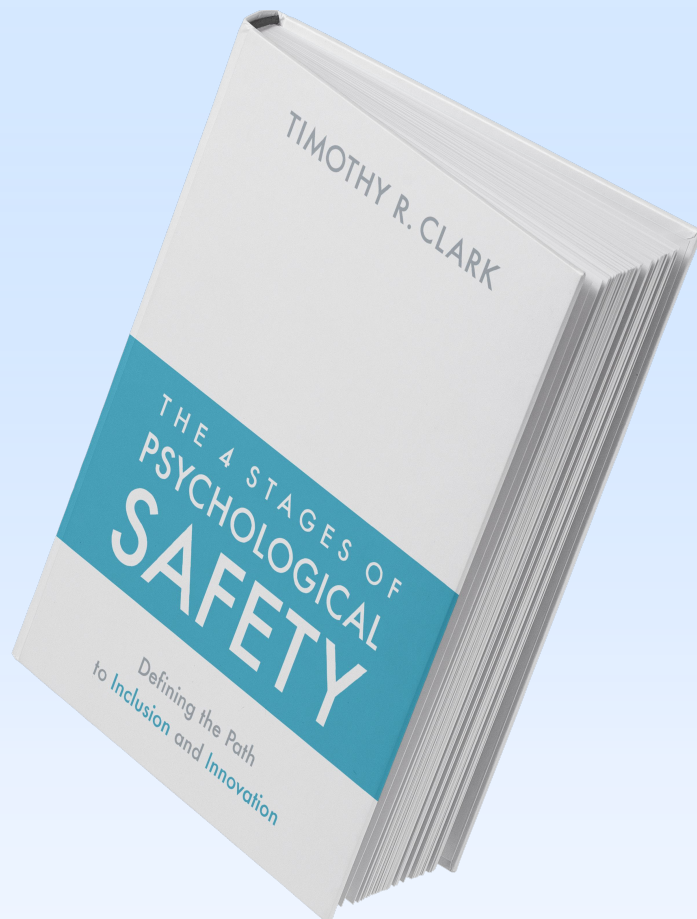
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