**Purpose**: The purpose of this document is to help ensure effective working relationships by starting with self-awareness, and by helping working groups understand each other.

**How to use it:** Begin by filling out the worksheet. While it may not be appropriate in every situation to share verbatim everything you capture, the notes from the worksheet, and the questions themselves can be meaningful prompts to help ensure that communication takes place about things that matter most.

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| Who I am | 1. Who am I as a person? How do I describe myself? 2. Who am I as an employee or leader in this organization? How do I perceive my own role? |
| What matters to me | 1. What are my highest priorities? 2. What are my non-negotiable values? 3. What are my goals? 4. What are my fears? |
| How I work best | 1. What is my ideal work environment (work and interaction with others)? 2. What is my ideal workspace (physical working conditions)? 3. When is my ideal work day (time of day, workload)? 4. How does my current work environment/space/day compare with my ideal? What are the impacts of any disconnects or gaps between ideal and reality? |
| How I communicate | 1. What is my preferred mode of communication to “send” information? 2. What is my preferred mode of communication to “receive” information? 3. How do I communicate most often during the day? 4. What communications do I shy away from, avoid, or dislike? 5. What feedback have I received in the past about my communication? |
| How I think | 1. When faced with a challenge or problem, what do I do? 2. When faced with a question, what do I do? 3. When faced with a decision that needs to be made, what do I do? 4. When faced with information or a perspective that is contrary to what I believe, what do I do? 5. Am I generally a visual (pictures), auditory (sounds), or kinesthetic (sensations) thinker? |
| What’s annoying | 1. What are my pet peeves at work or in communication or interactions? 2. What are my “trigger” words or phrases or actions? (things that cause me to stop being objective, or that compromise by ability to think rationally) 3. What habits, tendencies, unique words, or other things do I have that might be annoying to others? (things that others have mentioned in the past, or things that I do that might be more “quirky”) |
| How have I changed over time | 1. What specific things have I worked on from a development standpoint over the years that are meaningful to know about? (for example, I used to talk faster or more than I do now; I work hard to be a better listener; I make an effort to choose my words carefully; I provide my input last because I received feedback that I was too quick to jump the gun; I make faster decisions with less information than I used to because I received feedback that I was too slow to decide, etc.) |
| Other things that often come up | 1. What is my natural learning speed or processing speed, in the context of this environment? 2. What is my natural attitude (glass half-full, glass half-empty), disposition (positive, negative)? 3. What is my general outlook towards others? (suspicious, optimistic, quick to forgive, slow to forgive, loyal, critical, impatient, etc.) 4. What makes me happy, or “lights me up” or brings me joy? 5. What do I expect out of a colleague? 6. What do I think a leader should do? |

**Additional tips:** The following additional tips are included to help you consider conversations with your leader, your customer, your vendor your peers, your direct reports (both current and prospective). In general, a safe bet is to assume positive intentions and to talk clearly and plainly about expectations.

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| Audience Type | Tip |
| Your Leader | * Make sure you’ve thought through these concepts, and find ways to ask your leader about what it means to work with them. |
| Your Peers | * Have an open discussion about the things that annoy you (all of you) and make a commitment to avoid the things that annoy each other. * Have an open discussion about what you (all of you), and make a commitment to focus on giving each other the communication, interaction that you like. * Have a deliberate conversation about “expectations.” |
| Your Customer | * Have an open discussion about what you (all of you), and make a commitment to focus on giving each other the communication, interaction that you like. * Have an open discussion about their goals and priorities to make sure yours align with theirs. * Have a deliberate conversation about “expectations.” |
| Your Vendor | * Have an open discussion about your goals and priorities as well as theirs to ensure alignment. * Have a deliberate conversation about “expectations.” |
| Your Employee | * Have an open discussion about your goals and priorities as well as theirs to ensure alignment. * Have a deliberate conversation about “expectations.” |
| Potential Employee (Interview candidate) | * Talk about what it means to be a leader. * Talk about what it means to be an employee. * Ask questions that determine how their responses to “working with them” are in alignment with our out of sync with your own responses. * Have a deliberate conversation about “expectations.” |