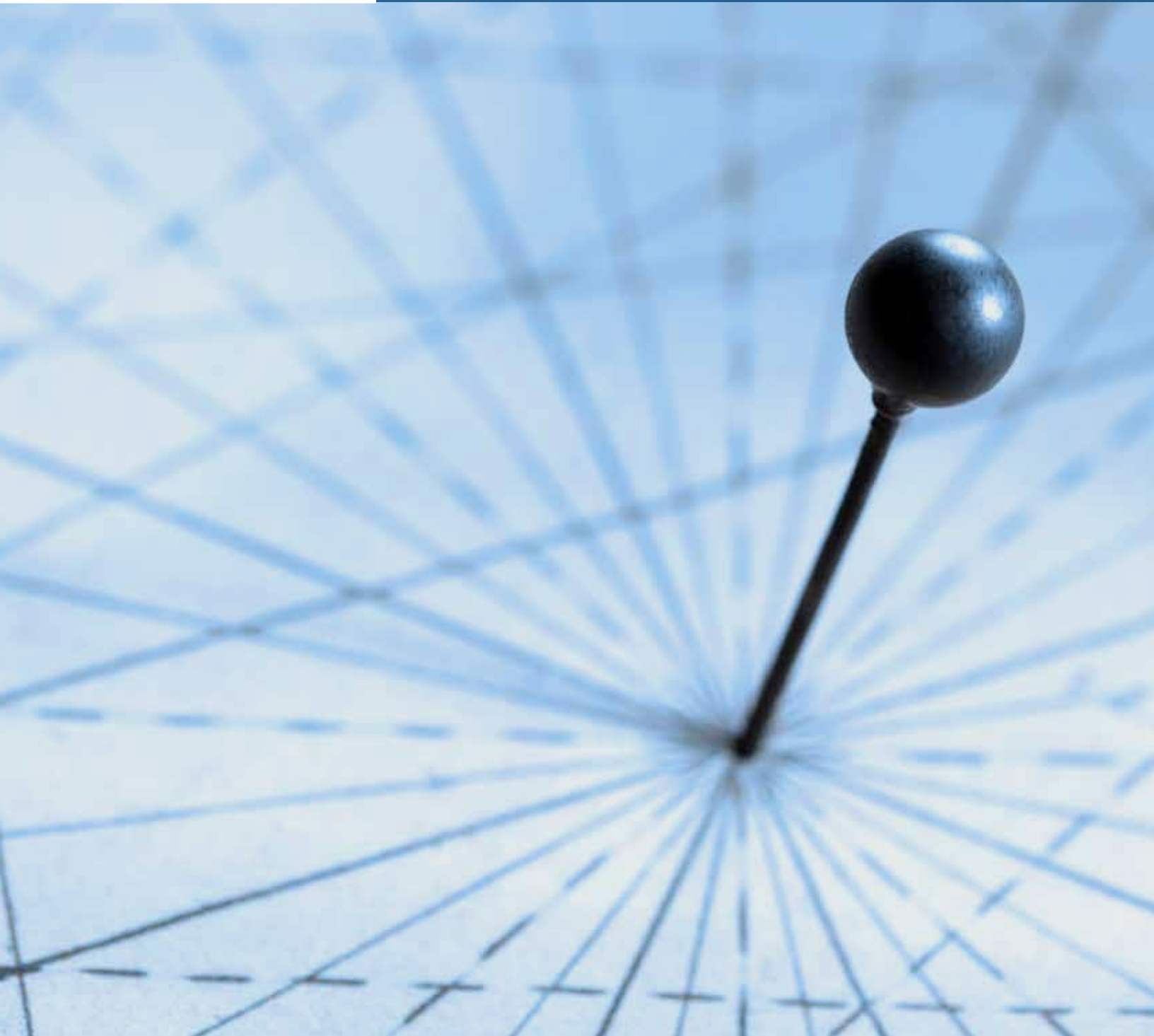




YOUR TRIP[™] ROADMAP

DESTINATION: ACTION!

By Steve Lear



Foreword

“Good things only happen when you’re in motion.”

-Dan Sullivan, Strategic Coach¹

Great road trips usually begin with a map to help you find the best way to your destination.

TRIP (The Resolution and Implementation Process) is a unique decision-making guide that improves project management. It teaches participants (“Travelers”) how to navigate roadblocks and achieve effective resolutions. TRIP gives each Traveler a voice in creating a roadmap to achieve your organizational goals. Wherever you are on your journey, TRIP makes sure you’re staying on course. Think of it as your project’s navigation system.

While you can carefully plan a trip, rarely is it a straight line from beginning to end. The road is often winding, filled with peaks and valleys. It’s inevitable that things you can’t control—the weather, traffic, road construction—will result in detours and delays. The wise traveler expects the unexpected and knows how to be flexible to adapt to change.

The same is true when deciding on a plan of action. While this manual describes how you might use the TRIP process from start to finish, project management is not linear. There will be roadblocks to clear to get where you’re going. Times when you’re making progress, and times when you have to reevaluate. However, you can use the TRIP tools to help you overcome obstacles anywhere along the way. For example, you may want suggestions about setting up decision-making teams at the start of your planning process. Maybe your project is well underway, but you can’t agree on the best strategies to pursue. Or you have decided on the best plan of action but haven’t been able to execute it.

TRIP provides *flexible* strategies to keep you moving forward at any stage of project management. You can use these tools at the time that’s right for *your* team.

Of course, TRIP’s ultimate goal is *action*—not only making decisions but implementing them. We hope this process gives you a roadmap to reach your goals faster, with less frustration, at the time that’s right for you.

Welcome to TRIP! Enjoy the journey.

1. The Strategic Coach Team, “Twenty Inspirational Quotes,” *The Multiplier Mindset* (blog), October 5, 2020, <https://resources.strategiccoach.com/the-multiplier-mindset-blog/20-dan-sullivan-quotes-inspirational-tips-insights>

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Introduction

A few years ago, I was assigned a daunting task: I had to create an expansion plan for my financial planning firm. The task fell to me in my role as Visionary—I was the “idea guy”—but this time, I had no idea where to begin. What questions do I ask? What process do I use? How would I make decisions, get ideas from other people, put a plan into action? I felt completely overwhelmed.

Searching for answers, I thought about what I learned from my business coaches over the years. I soon realized I already had a wealth of knowledge and experience to draw on. And so, I began to create TRIP™ (The Resolution and Implementation Process) as a roadmap to follow when making decisions.

My inspiration for TRIP grew out of my work with influential community groups in Minnesota’s Twin Cities. Over forty years, I’ve held many roles in these organizations, where frankly, at times, I’ve been driven to tears by the way decisions are made and executed. I know I’m not alone. Volunteer and staff burnout are common, creating high rates of community disengagement.

I knew there had to be a better method to move a decision-making group forward. I decided to create a more *inclusive* way to make and implement decisions to give everyone involved a voice in the process and a stake in the outcome.

Maybe you, too, have felt that moment of panic when faced with a critical decision. Or you’ve been frustrated volunteering for an organization that spins its wheels. If so, TRIP is for you. Consider this a roadmap that will help you increase engagement, resolve more challenges, make better decisions, and get things done.

Reaching your goals restores joy to community service and increases your impact in repairing our world.

I invite you to join me as we navigate the road from idea to decision to action. Let’s take a TRIP!

What is TRIP?



Too many good ideas never get off the ground. They get buried on legal pads or unfinished Google Docs, unfortunate casualties of ineffective decision-making.

Community organizations have no lack of people with good intentions and bold ideas, but these ideas need a systemized way to come to fruition. Without an effective system to navigate the inevitable roadblocks to reaching goals, good intentions remain just that. Intention.

That's where TRIP comes in. TRIP is a unique decision-making system that guides ideas into resolutions and implementations. TRIP provides each participant (Traveler) with a voice. It creates a roadmap to lead your team from initial decision-making to an action plan that achieves your goal. The TRIP process guides your team through challenges that

- Are complex.
- Involve many people.
- Take a long time to execute.
- Have long-lasting impact.

TRIP is useful when you need to

- Plan a project.
- Resolve an issue.
- Achieve a goal.

What is TRIP?

WHY TAKE A TRIP?

TRIP streamlines the decision-making process, allowing your team to succeed or fail more quickly and with less frustration. While it's great to succeed, it's also okay to fail. Failing builds character, creates learning opportunities, and prepares you for the joy of success.

So, how will TRIP help you?

- **You'll save time!** This process quickly identifies
 - > Areas of agreement that don't require further debate.
 - > Areas of disagreement that need attention. Your team can quickly focus on identifying, discussing, and resolving contentious issues.

Saving time is a huge benefit because time is a precious resource that's not renewable. When a decision takes too long to make, you run the risk that

- > An important person may get sick or die, and the process may need to be postponed or restarted.
- > Team members may quit, disrupting group morale and creating burnout or apathy. Apathy is the worst thing that can happen to a team.
- > Travelers burned out by the process may not have the energy to participate in the action plan. Making the decision is a critical first step, but if it never results in action, then everyone's most precious assets—time and a sense of purpose—have been wasted.

- **ALL Travelers—the Dreamers, Thinkers, and Doers (see page 10)—contribute to resolving the issues and enacting a plan.** Successful teams learn to appreciate the unique contributions each Traveler makes to the journey.
- **Teams who utilize their collaborative strengths increase engagement, motivating Travelers to achieve the goal.**
- **Your action plan will be more effective.** Documenting the decision-making and action strategies results in a roadmap. This map creates accountability, and *that* leads to getting the job done.

As entrepreneur Michael Altshuler observed, “The bad news is time flies. The good news is you’re the pilot.”¹



“The bad news is time flies. The good news is you’re the pilot.”

What is TRIP?

WHEN TO GO ON A TRIP?

TRIP is a great tool in some situations and much less effective in others.

TRIP is the right process when:

- An organization's leadership (staff or volunteer) solicits input from others to make wise decisions.
- The leadership model is participatory ("open and honest") vs. authoritative ("control and command").
 - > Open and honest leadership is inclusive. It's willing to "lower its armor" and listen to other opinions, realizing it doesn't need to have the best answer and might even be wrong.
 - > Control and command leadership features one, or a few, stakeholders controlling the direction and operation of the organization. It directs other stakeholders to execute decisions.
- There is a greater need for the *right* decision than for an *immediate* decision.
- You've reached a decision but haven't been able to implement it.
- The challenges are complex, include many people, take a long time to enact, and have a long-lasting impact.

TRIP is less likely to work when:

- Leadership is not interested in getting feedback from stakeholders. (Stakeholders include the leadership/management team, staff, board leadership, funders, investors, clients, customers, media, and government.)
- Stakeholders believe that great leaders create effective organizations vs. effective organizations create great leaders.
- An organization is in chaos. "Chaos causes organizations to lose two things: confidence and strategic focus. Under duress, leaders and their teams often lose confidence in their ability to make decisions, which leads to operational inefficiencies, performance setbacks, and competing operational goals. Chaotic leadership teams miss opportunities to predict and mobilize for change. They will end up reacting to change instead, which leaves them without strategic focus."² (Note: TRIP *will* work when an organization comes out of chaos to help prevent another crisis.)
- Decisions involve urgent situations. If deciding *now* is crucial, don't take a TRIP. Instead, assign three people to make the decision.

(Note: TRIP *will* work to develop protocols for handling emergencies.)



Planning Your TRIP

A successful TRIP requires careful planning at the outset. Each step occurs in its own space and time. Leadership and team members must analyze their situation and determine:

- Whether they're ready to begin a TRIP
- How they'll use TRIP. Teams can plug into specific parts of the process at the time that's right for them.

The process begins with selecting the Right Tour Guide and then Creating Teams of the Right Vehicles, filled with the Right People for the journey.

THE RIGHT TOUR GUIDE

The right Tour Guide for your group is key. The best person for this job will

- Believe in people's wisdom and creativity.
- Search for synergy and overlapping goals.
- Listen openly and actively.
- Understand group dynamics.
- Trust in the inherent power of groups and teams.
- Respect individuals and their points of view.
- Tolerate uncertainty and patiently wait for a decision to evolve and gel.
- Possess strong interpersonal and collaborative problem-solving skills.
- Comprehend effective systems for accomplishing tasks.



Planning Your TRIP

- Demonstrate a flexible vs. lock-step approach to resolving issues and making decisions.
- Maintain a neutral perspective on content and process.
 - > Content neutrality means not taking a position on the issues or having a stake in the outcome.
 - > Process neutrality means not advocating for a *specific* process, such as brainstorming.

A Tour Guide's power lies in becoming both content-neutral and a process *advocate*: supporting fair, inclusive, and open processes that balance participation and improve productivity. The goal is to establish a safe psychological space in which **all** team members can fully participate.

The Tour Guide's role is similar to that of a Facilitator: "to help minimize wheel spinning and dysfunctional dynamics and to enable groups to work together much more effectively."³

The ideal Tour Guide will be the one who can lead the group without any bias or hidden agenda. As such, I advise leadership to select someone outside of the organization to fill this pivotal role.



A Tour Guide's power lies in becoming both content-neutral and a process advocate: supporting fair, inclusive, and open processes that balance participation and improve productivity.

Planning Your TRIP

CREATING TEAMS

Identify the Right Vehicles (Types of People)

Leadership must create the following fleet of Vehicles to be driven at the right time on the TRIP. Each Vehicle represents a decision-making group.

Tesla

The first Vehicle is a Tesla. Travelers in this car are the **Dreamers**, the “everything-is-possible” people. They are innovative and imaginative, but sometimes not practical. They focus on the goal and how the destination will look and feel. They develop a way of speaking about the activity but spend no time thinking about Roadblocks (obstacles.) These Travelers need to re-engage when it’s time to create strategies for overcoming Roadblocks.

SUV

The second Vehicle is an SUV. The practical, realistic **Thinkers** are at the wheel. Halfway through the journey, Thinkers describe the gas tank as “half empty.” They’re often skeptical, but never cynical. Their job is to see *all* the Roadblocks (obstacles) that prevent the team from getting to their destination. Thinkers understand what it might take to enact a decision. They ask the questions that must be answered to create the roadmap.

Snowplow

The third Vehicle is a Snowplow. I’m from Minnesota, where we’re very proud of our plows! They take on the seemingly impossible task of clearing endless amounts of snow, working tirelessly until the roads are open. Travelers in the Snowplows are the **Doers**, people who get things done. The Snowplow clears away the Roadblocks, putting the plan into action. Creating a roadmap to take you from decision to action requires that the Dreamers (Tesla drivers), who are focused on future possibilities collaborate with the Thinkers (SUV drivers) who are focused on past experiences. While this could be potentially contentious, Travelers who’ve learned to appreciate each other’s unique perspective may consider this the best part of taking a TRIP. This discovery could provide the energy and confidence to reach the Destination (Goal).



Planning Your TRIP

Identifying the Right People (Attributes)

I've discussed the *types* of people needed on your TRIP; now, let's find the *right* people for the journey—people who possess self-awareness, integrity, and values that align with the organization.

Self-Awareness

I advise leadership teams to focus on finding people who are “self-aware.” These are travelers who know their character, feelings, desires, and motives. They understand the way they like to communicate and solve problems. I recommend the following tools to identify and develop self-aware people:

- Kolbe Wisdom™ ⁴ (see Appendix 1)
- Values Cards Exercise⁵ (see Appendix 2)
- Communication Builder™ ⁶ (see Appendix 3)
- Team Builder Profile™ (see Appendix 4)

Each Traveler will receive a personal Team Builder Profile™ (which includes their results on the above self-awareness exercises) as well as a Kolbe Wisdom™ interpretation.

For the entire process to succeed, leadership, too, must be self-aware.

Integrity

The second essential quality to have is integrity—people who tell the truth, stand up for what's right and keep their promises. Someone with integrity will also

- Take responsibility for personal choices.
- Admit mistakes and failures.
- Embrace the responsibility of serving others.
- Care about others.
- Be forgiving, letting go of their own and other's mistakes.

Planning Your TRIP

Values

Values are principles or standards of behavior that guide us when making decisions. The more our *ideal* values align with our *real* behavior, the greater our sense of well-being. Misaligned values are a major cause of frustration and dysfunction. One tool used to identify values is the Values Cards Exercise™. For a TRIP to be successful, people's values need to be aligned.

Leadership will put together teams of Dreamers, Thinkers, and Doers. All three types are needed to get the job done. However, exactly *where* to put them on your TRIP requires some skill.

The leadership team must answer the following questions when considering who is going to occupy their vehicles⁷:

- Is there an expert on the subject who can influence the decision and the action plan? An expert may bring positive or negative energy to the team. To determine whether your expert(s) will bring value to the process, use the Self-Awareness Tools (see page 11) and answer the interview questions below.
- Do any teammates have conflicts of interest? If so, excuse them from the process.
- Do you need to defuse any dominant team members?



Leadership will put together teams of Dreamers, Thinkers, and Doers. All three types are needed to get the job done. However, exactly where to put them on your TRIP requires some skill.

Planning Your TRIP

It's important to interview candidates to fill your Vehicles. Your interview questions (written or verbal) will include the following:

- What do you know about our organization, and what's your impression of it?
- Once a decision's been made and implemented, what's your interest in what it will accomplish?
- Have you been involved with this type of situation in the past?
- Three years from now, what needs to happen for you to be proud that you participated in this process?
- What unique abilities do you bring to this process?
- Would others consider you a gracious loser—someone who might lose a battle but still fight the war?
- (If applicable) Where do you score in each of the Kolbe Wisdom™ Action Modes®? (This score reveals someone's natural way of getting something done. If your organization has utilized Kolbe Wisdom™, see Appendix 1 for an explanation of how to integrate Kolbe into your TRIP process. If you're not familiar with Kolbe, see the Appendix to learn about its benefits.)

The answers to these questions allow leadership to make informed decisions. Such information can be particularly useful for nonprofits when vetting volunteers to serve on their boards and committees. TRIP can improve the selection process and may even help attract volunteers interested in community work.

Remember, Travelers in your Vehicles **do not** need to like each other; however, they **do** need to understand, respect, and appreciate each other. They also don't need to agree—and almost always, they do not.

As a friend once said to me, "You're not close to anybody unless you've had a fight. And I'm really close to my wife."



TRIP can improve the selection process and may even help attract volunteers interested in community work.

Planning Your TRIP

CREATING TEAM AWARENESS

For teams to work together effectively, you need to build trust between team members. To create or increase trust, we strongly suggest that all Travelers attend a full day workshop with the following agenda:

Identify the Introverts and the Extroverts

Each personality type has a different style, which affects how quickly the team makes decisions. Extroverts share thoughts freely and prefer action over reflection. They respond quickly. Introverts are careful observers who listen closely to suggestions. They generally need more time to process information. Each type needs to communicate in their preferred way while respecting the other's way. This behavior builds alliance—and trust.

Share Team Builder Profile™ Results

- Demonstrate how **Kolbe Wisdom™** improves team health by helping team members to understand and appreciate the unique strengths each person brings to the table.
- Review the **Communication Builder™** by having all members provide examples of productive vs. unproductive communication. The take-away is for the group to understand each person's preferred method of receiving information so they can work together more effectively.
- Reveal each person's top 5 values from the **Values Cards Exercise** to help the group clarify role expectations, identify areas of potential conflict, and determine how their values can be used to increase team productivity.

Helping teammates to understand each other's values and natural ways of dealing with data, process, risk, communication, and problem-solving won't lead to agreement on the issues, but it will help clarify *why* there is disagreement, allowing teammates to build bridges.

At this point, you've filled your Vehicles with the right people and helped them to understand each other. It's time to start making decisions and taking action!



The take-away is for the group to understand each person's preferred method of receiving information so they can work together more effectively.

Planning Your TRIP

FINAL PACKING INSTRUCTIONS



Voting

One of the most effective ways to streamline your decision-making process is to vote on the issues under discussion. Voting is a hallmark of democracy. Democracy creates engagement and increases the chance that a decision will result in action. Action is critical! Decisions without action accomplish nothing and waste everyone's time.

If engagement is critical to successfully enacting a decision, then vote early and often. Reporting back to voters and other stakeholders at every turn is imperative. Also, remind all

stakeholders to take voting seriously because the final decision will affect them. If you ask voters for money, again, ask early. It's one thing to get people's opinions. It's harder to get their money.

The biggest benefit of voting is that it identifies the issues of agreement, which builds connection and momentum. **It tells the leaders what doesn't need discussion.** Think of all the times you've heard participants repeat what others say, especially when there's agreement. While this demonstrates camaraderie and support, it's also a huge waste of time, diverting energy away from the issues that must be discussed and solved.

Virtual (cloud-based) voting is valuable even if the group is small. Balloting with some open-ended questions may create new and better solutions, as it offers the "quiet" ones an opportunity to be heard. Quiet ones are often reluctant to share their ideas in group discussions, overshadowed by those who like to think out loud. (I know. I think out loud all the time.)

To begin, decide which voting method you're going to use. Dozens of internet sites provide cloud-based voting. We'll show you how to produce a ballot using Microsoft Forms (see Appendix 10), but there are many other balloting software options you can use. Two significant considerations when creating a ballot are selecting the right language and the right format. To make sure your poll is effective, we recommend that organizations seek guidance from someone experienced in ballot design.

The first balloting question needs to be "what percentage of a vote constitutes a majority opinion and is considered a winning vote?" Once you reach a majority, further debate ends.

If balloting doesn't produce a majority opinion on an issue, leadership may need to arrange a town hall meeting. At this meeting, presenters state their positions and attempt to convince others. They can do this verbally, or a quiet one can submit something in writing. The meeting organizers produce a report, send it to previous voters, and vote again. If they can't decide after three ballots, the organizers make the decision.

Planning Your TRIP

Managing Expectations

Every TRIP takes time. However, there's a difference between using that time well and spinning your wheels.

To manage expectations, teach your team to "Avoid the Gap." This is a concept developed by Dan Sullivan, creator of The Strategic Coach business and author of *The Gap and The Gain*.⁸ Sullivan's premise is that to be joyful we need to measure our achievements by how far we've come from the starting point, rather than how far we are from the ideal (and unobtainable) goal. When we can see progress, we're motivated to keep moving forward.

Measuring Success

Your TRIP is successful if it results in the following:

- A better decision
- More engagement in the action plan
- Less time spent, with less frustration

On a successful TRIP, Travelers will approach the journey with humor, honesty, transparency, and openness. They won't view conflict as negative; they will embrace it as reality. This positive mindset paves your TRIP highway with a commitment to finding constructive solutions to remove your productivity roadblocks and achieve your goals.



On a successful TRIP, Travelers will approach the journey with humor, honesty, transparency, and openness.

Taking Your TRIP



THE ENTRANCE RAMP

As you approach the Entrance Ramp, you need to make the following critical decisions:

1. Identify your Travelers and assign them a seat on the appropriate vehicle.
2. Identify and name the decision you're making, the project you're planning, or the action you want to take.
3. Establish start and finish dates.

Naming your TRIP builds a common language for Travelers, which is critical to move from decision to action. (See Appendix 5 to learn how "Shared Language" makes your discussion more effective.)

Envision and Document the Destination

This step is often forgotten but is crucial to successfully implementing the goal. It serves as an important reminder of why you're taking the TRIP. You'll answer this question:

Imagine that we have accomplished the goal. In other words, we reached our Destination. How will it look? How will it feel?

Every TRIP will hit potholes (at least in Minnesota). To help overcome these disappointments, review your Destination statement regularly to remind the team **why** you're taking this TRIP. You want your statement to be inspiring and motivating.

Taking Your TRIP

Identify Goals

Establish a S.M.A.R.T. Goal

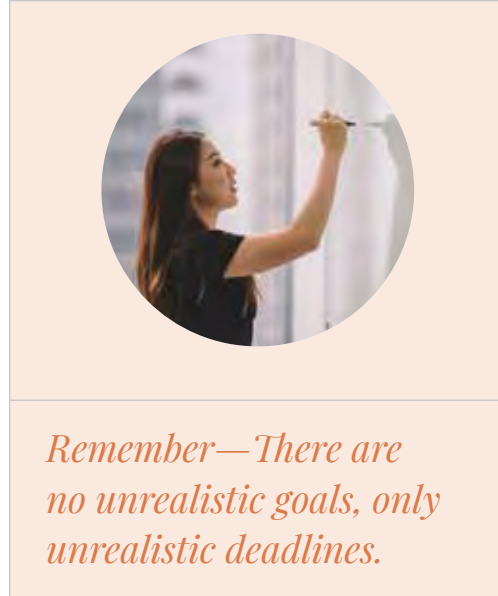
The next step is to document the goal(s) the team wants to accomplish. What do you want to happen? Writing it in S.M.A.R.T. format creates clarity. S.M.A.R.T. is defined here as

- Specific
- Measurable
- Achievable
- Relevant
- Time-Bound

Setting a goal for your TRIP lets Travelers know their objectives.

At this point on your journey, begin completing the TRIP Roadmap, Part 1, the VISION PLAN (see Appendix 6).

Remember—There are no unrealistic goals, only unrealistic deadlines.



ROADBLOCKS (OBSTACLES)

Once you've completed the Vision Plan, it's time to begin the critical task of identifying Roadblocks. Roadblocks are obstacles Travelers must overcome to reach their Destination (goals).

Obstacles might include

- The cost of achieving the goal. This cost can come in the form of dollars, time, ego, or a relationship with someone.
- Emotional roadblocks, such as fear or anger.
- A need for key information to complete the project, such as:
 - > Data to determine if the goal is feasible or if you're on the right track
 - > The right people
 - > The best process
 - > Legal issues to resolve

To help identify Roadblocks, you might wish to consult the following:

- Historical information (wisdom from the past fuels a better future)
- Academic research
- Someone with experience in the issue under discussion

Taking Your TRIP

The Thinkers in the SUV—those who strive to be precise and accurate—are the best people to identify the roadblocks. As they think about the best route to a goal, ask them to

- List the perceived roadblocks.
- Prioritize the roadblocks.
- Pick the top 10 Roadblocks (if 10 exist).

Note: When listing Roadblocks, participants often jump ahead to solutions. ***We urge you to prioritize the roadblocks before focusing on solutions.***

Identifying Roadblocks may be the shortest part of your journey. Most people are better at determining why something will *not* work than why it will—it's simply human nature.

I recommend that you include a Tour Guide to keep the agenda on track. The Tour Guide can either record meetings so he or she can later document the group's decisions or hire a scribe to take notes during meetings.

ROAD REPAIRS (SOLUTIONS OR STRATEGIES)

Once you've prioritized the Roadblocks that stand in the way of reaching your goal, it's time to call in the Snowplows!

A Snowplow is the vehicle of choice to clear the roadblocks. But have you ever noticed that snowplows are unable to clear 100% of the snow? I point this out because many of the strategies that groups create and adopt will not eliminate an obstacle—or eliminate *all* obstacles. Sometimes we need to be OK with clearing 80% to 90% of an obstacle. While this might be troubling to perfectionists, please believe that eliminating 80% of an obstacle is often satisfactory.

Once again, a Tour Guide can help facilitate meetings for the options you choose, moving the agenda forward and keeping track of what the group decides or recommends.

STRATEGY TOOLS (TO REMOVE ROADBLOCKS)

Brainstorming

Before a brainstorming session begins, I urge the Doers in the Snowplow to work alone. Each Doer needs time and space to develop their solutions before a group meeting.

I also advise the Snowplow Doers to write down their ideas, so everyone participates. All groups include a mix of introverts, extroverts, and ambiverts (people who balance extrovert and introvert features). An introvert might have great strategies but be reluctant to express them in a group meeting of vocal extroverts. Written answers might be their preferred method of sharing ideas.

Taking Your TRIP

Think-Pair-Share

Another way to get everyone involved is to use a tool called Think-Pair-Share. First, identify the obstacles you want to address. The group takes several minutes to individually think about a strategy to overcome a specific obstacle. The Tour Guide will then pair up people to discuss solutions for a given amount of time. After the pairing, all the Snowplow Doers come together to share their ideas, and the fun begins—strategies develop. (see Appendix 7)

How does the group select the strategy with the best chance of success? There are more tools for that!

Pro-Con Analysis

This well-known technique compiles a list of advantages and disadvantages to select the best action plan. It can also validate the sub-strategies and determine whether they're doable.

The Matrix

Building a Matrix can also help to prioritize strategies. Here's how it works:

1. Create a Matrix Grid.
2. In the top row of the Matrix, list the important decision-making criteria.
3. Vertically, on the left side, list the strategies you think will help you reach the goal.
4. Weight each criterion by number—the more important it is, the higher the number.
5. Now weight each strategy according to how well it achieves the criterion—the value measurement.
6. Finally, produce a single number by multiplying the criterion score by the value measurement.

Strategies with the highest numbers are your top priorities, with the best chance of helping you reach your goal.

If the group can't reach consensus after using the above tools (which is OK), I suggest you bring it to a vote, with a majority vote deciding the winning strategy to adopt. Once again, before you vote, be sure you've defined what constitutes a majority.

Now you're ready to complete the TRIP Roadmap, Part 2, the ACTION PLAN (see Appendix 6):

- **Roadblocks:** list the top obstacles to overcome
- **Road Repairs:** identify your best strategies and outline the steps needed to implement the strategy on the S.M.A.R.T. TRIP Strategy Planner (see Appendix 8). Assigning a deadline to each step creates accountability, letting all team members see the status of the project at any point in the process, and what may need to be revised to keep moving forward.

Taking Your TRIP

- **Resources:** list any assistance you'll need to achieve the goal, both internally (from other team members and their departments) and externally (from outside sources). This also helps to identify any challenges (such as staffing, supplies, or timing) that must be addressed.

After resolving the top 10 Roadblocks (if 10 exist), achieving the goal is often 80% complete and that may be good enough.

The Tour Guide will monitor the TRIP Roadmap's due dates to make sure the project stays on track.

THE OPEN ROAD

Time to Drive!

You've made the hard decisions, developed the best strategies, and are ready to put your TRIP Roadmap into action. Enacting a strategy usually involves people, capital (money), a calendar, space, and leadership. Project management begins!

Traveling the open road to reach your goal can take days, months—even years. Rest stops can be a critical pause to rejuvenate on your journey. Taking time away from the process to vacation, exercise, or spend quality time with friends can help to restore your perspective and motivation. Re-engaging with a clear mind can result in new and better ways to remove Roadblocks.

By choosing TRIP, I hope that you'll reach your goal in less time, with less frustration. I suggest you set up regular tracking meetings to monitor and celebrate your progress.

The Finish Line

How will you know when you've crossed the finish line? It will *look* like you've accomplished your goal and *feel* like you've reached your destination.

It's a practical assessment of the project, combined with an emotional sense of accomplishment. Everyone involved will either be smiling, clapping, and drinking champagne—or tearful and sad. If you didn't reach your goal, there's a very good chance it had nothing to do with you or other members of the team.

Why? Because sometimes you can pursue your best strategy yet still not meet your goal. For example, maybe your fundraising event didn't reach your target dollar amount despite

- Great publicity.
- A wonderful speaker.
- Good attendance.
- Pledged support.

Whether or not you succeeded, now is the time for reflection. **Either way, your journey represents progress!**



Your Trip Journal

DISCUSSING YOUR POST-TRIP EXPERIENCE

Keeping a travel journal of your experiences will help you recall key events on your TRIP. You can build this along the way or when you reach your Destination.

Journaling is an exercise that channels the intense energy of both positive and negative situations on your TRIP into a tool for learning and growth. Writing in a journal allows you to stop the action, spotlight the situation, analyze what did and didn't work, brainstorm strategies and solutions, and then design a system to communicate with others.

Journaling, when used consistently, becomes a powerful way to transform your experiences into lessons for the future. It encourages Travelers to think proactively. It can be done by one person or in a group setting. From journaling, innovative talents will yield new solutions, improved systems, deepened relationships, and restored confidence.

Appendix 9 features a journal format with questions to be answered by the group.



Your Trip Journal

A FINAL WORD

TRIP seems like a linear process, but the recommended tools and how you'll use them, are not. Everything happens in its own time. As team members and leadership analyze their situations, they can plug into the various parts of the process at the time that's right for the team.

In closing, TRIP is a process I recommend from personal experience. When my financial planning firm started using it in 2018, we began to gain traction. Using it has given us a vision for the future, stakeholder participation, and renewed energy for our mission.

My passion is to bring these same benefits to community organizations.

TRIP is a roadmap showing you a way to *get things done* faster and with less frustration. I hope it will help you to increase engagement, make better decisions, and resolve more challenges.

Whether you want to travel alone or with a Tour Guide, TRIP will help you overcome obstacles and achieve your goals. May you find success and joy on the journey!

End Notes

1. Dan Scalco, "22 Time Management Quotes to Inspire You to Achieve Your Goals," *Inc. This Morning Newsletter*, September 17, 2017.

<http://www.inc.com/dan-scalco/22-time-management-quotes-to-inspire-you-to-achieve-your-goals.html>
2. Kelly Tyler Byrnes, "Seven Ways to Prevent the Dangers of Organizational Chaos," *Forbes Coaches Council* (blog), September 18, 2018.

<http://forbes.com/sites/forbescoachescouncil/2018/09/18/seven-ways-to-prevent-the-dangers-of-organizational-chaos>.
3. Michael Doyle, from Forward to 3rd edition of *Facilitators Guide to Participatory Decision Making*, Sam Kaner et. al., (San Francisco: Jossey-Bass, 2014), xviii.
4. Kathy Kolbe, "Kolbe Wisdom," Kolbe Corp, accessed December 23, 2019. <http://www.kolbe.com/Kolbe-wisdom>.
5. "The Original Values Card Deck," think2perform, accessed January 9, 2020.

<http://www.think2perform.com/tool-shop/tools/original-values-cards-deck>.
6. The Communication Builder was inspired by Shannon Waller, *The Team Success Handbook* (Ontario: The Strategic Coach, Inc., 2013).
7. Doug Lennick and Fred Kiel, Ph.D., *Moral Intelligence: Enhancing Business Performance and Leadership Success* (New Jersey: Prentice Hall, 2005) In addition, "The Original Values Card Deck," think2perform.
8. Dan Sullivan, *The Gap And The Gain* (Toronto: The Strategic Coach®, Inc., 2019).



TRIP Glossary

Brainstorming:

A strategy development tool which generates ideas and solutions through intense and spontaneous group discussion.

Communication Builder™:

A group trust-building tool developed by Strategic Coach® that teaches team members to understand how others want to receive information versus how you want to provide information.

Kolbe Wisdom™:

A series of self-awareness assessment tools developed by Kathy Kolbe. It is also a philosophy or theory that identifies how people initiate action– their natural method of operation for getting something done.

Matrix:

A tool to prioritize strategies by ranking the strategy options against the important criteria. The strategy with the highest score is most likely to achieve the goal. A matrix works best when there are three to eight criteria to consider.

Pro-Con Analysis:

A decision-making tool that lists arguments both for and against a particular strategy to reach an informed solution.



TRIP Glossary

Team Builder Profile™:

A unique tool that promotes both self-awareness and team awareness. Each person's profile contains their biography and their Kolbe Wisdom™, Communication Builder™, and Values Cards Exercise results. These profiles are then shared with the group, helping team members learn the most effective ways to work together.

Think-Pair-Share:

A strategy development tool which pairs team members to write and discuss solutions before sharing them with the group.

Tour Guide:

The person who facilitates the TRIP and leads the TRIP process.

Travelers: TRIP Participants

- Dreamers—Innovators, Big Idea People
- Thinkers—Directors, Administrators, Leaders, Management
- Doers—Staff and Volunteers who do the work and implement the strategies

TRIP :

The Resolution and Implementation Process

Values Cards Exercise:

A self-awareness assessment tool developed by Doug Lennick of think2perform used to help team members identify the Top 5 Values associated with living their ideal life.

Vehicles:

The Travelers drive specific vehicles. Each vehicle represents a decision-making group.

- Tesla—(Dreamers)
- SUV—(Thinkers)
- Snowplow—(Doers)



Appendix 1 / Kolbe Wisdom™

KOLBE WISDOM™ ACTION MODES

Why use Kolbe? It measures the instinctive level of your teammates—how they initiate *action*, their natural way of working. Kolbe assessments measure Four Action Modes®:

- **Fact Finder:** how you gather and share information
- **Follow Through:** how you organize
- **Quick Start:** how you handle risk and uncertainty
- **Implementor:** how you handle space and intangibles

Kathy Kolbe's key insight is that everyone has a strength in how they operate in each of these four Action Modes®. Each person's method of operation, or "MO," is their strength in that area. These strengths are magnified when entire teams are working in their natural way. Kolbe helps your team to

- Improve communication and collaboration among team members.
- Align team responsibilities and individual strengths.
- Eliminate frustrating, long, and unproductive meetings.
- Create a culture of respect, accountability, and performance.

Kolbe assessments help ensure your TRIP has the right people with the right skills to achieve your goal.

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Appendix 2 / Values Cards Exercise

WHY LIVING IN ALIGNMENT WITH OUR VALUES IS IMPORTANT

Doug Lennick and Fred Kiel, Ph.D. are the authors of the ground-breaking book, *Moral Intelligence*. In their many years working as executives, consultants, and coaches, both men observed that the most “successful leaders consistently make decisions aligned with their values”¹, a behavior they described as “moral intelligence.” By doing so, these leaders create positive and high performing work environments.

Our values are personal beliefs that can guide us when making decisions. It is urgent that we identify our most important values because life is finite. Values help us to be selective about how we spend our time. Without values, how would we decide what goals are worth having? “Living in alignment is about aligning your *real* behaviors with your *ideal* values. It is both as simple and as difficult as that!”²

Our values often change over time, so doing this exercise every so often can be helpful. The more you live in alignment with your values, the more effective you’ll be in both your personal and professional life.

DISCOVER YOUR VALUES



Doug Lennick of think2perform® developed the Values Cards Exercise. Use the link below to complete this exercise online:

<https://www.think2perform.com/our-approach/values>

When finished, record your 5 values and definitions on a blank card and store in a convenient location for future reference.

¹Doug Lennick and Fred Kiel, Ph.D. with Kathy Jordan, *Moral Intelligence* 2.0 (Upper Saddle River NJ: Prentice Hall, 2011) 64.

²“The Original Values Card Deck,” think2perform®, accessed August 30, 2020. <http://think2perform.com/tool-shop/tools/original-values-card-deck>

Appendix 3A / Communication Builder™

Name: _____

Date: _____

Organization: _____

Most Effective – Giving Information		
My favorite way of offering information to others is through: ○ Bottom Line ○ Lots of Detail ○ Lists ○ Diagrams/ Pictures ○ Models ○ Other: _____	Top Response: Choose an item.	If Top Response is not feasible, the next best option is: Choose an item.
Most Effective – Receiving Information		
My favorite way of receiving information from others is: ○ Bottom Line ○ Lots of Detail ○ Lists ○ Diagrams/ Pictures ○ Models ○ Other: _____	Response Top Response: Choose an item.	If Top Response is not feasible, the next best option is: Choose an item.
Most Effective – Timing of Communication		
The most effective method/ time of day to communicate with me is: ○ Scheduled Meetings ○ Last Minute ○ Mornings ○ Afternoons ○ On the Fly ○ Other: _____	Response Top Response: Choose an item.	If Top Response is not feasible, the next best option is: Choose an item.
Most Effective – Time Sensitive / Critical Issues		
The most effective way of communicating with me on time sensitive or critical issues is ○ Face to face ○ Phone ○ Email ○ Voicemail ○ Text ○ Online Meeting ○ Other: _____	Response Top Response: Choose an item.	If Top Response is not feasible, the next best option is: Choose an item.
Handling Stress		
What is the most effective way for co-workers to support your work in stressful situations? ○ Listen/Be a sounding board ○ Get input from others ○ Reassurance ○ Leave me alone ○ Call a team meeting	Response Top Response: Choose an item.	If Top Response is not feasible, the next best option is: Choose an item.

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Appendix 3B / Communication Builder™

Exercises to Accompany the Communication Builder™

These scenarios are designed to be used either individually or in a group setting, after completion of the Communication Builder.

Scenario 1 – Your meeting yesterday with major donors/funding agency representatives has left you questioning whether they were satisfied with your responses.	Response
What are your next steps? - Do you reach out to the donors/funders? - If so, how do you reach out? - If so, when do you reach out? - What do you say?	
Scenario 2 – You are working on a project with a colleague. You wrap up your third meeting where your colleague did not complete all tasks from last week. The project is due next Friday.	Response
What are your next steps? - Do you reach out to your colleague? - If so, how do you reach out? - If so, when do you reach out? - What do you say?	
Scenario 3 – Your boss asks you for a recap of the conference you just attended.	Response
What are your next steps? How do you meet his or her request?	
Scenario 4 – You just received word that you are a finalist for a very large, nationally recognized grant.	Response
What are your next steps? - Do you reach out? - If so, how do you reach out? - If so, when do you reach out? - What do you say?	
Scenario 5 – you find out that a 56-year-old major donor just lost her job.	Response
What are your next steps? - Do you reach out? - If so, how do you reach out? - If so, when do you reach out? - What do you say?	

Appendix 4A / Team Builder Profile™

Team Builder Profile™ Example / Page 1 of 2

TEAM SUCCESS PROFILE™	
STEVE LEAR	phone (612) 636-8223
	email Steve@stevelear.org



In a career spanning 40 years and counting, I have devoted my time and energy to personal finance, philanthropy, and leadership training.

As a financial advisor, I help individuals and business owners organize their finances so they can focus on family, work, community, and leisure. In 2022, I worked to help the Minnesota Council on Economic Education (MCEE) pass important legislation: beginning in 2025, high school students will be required to take a personal finance course before graduation. I continue to promote financial literacy education as an MCEE Board Member.

I am also passionate about helping people develop stronger leadership skills and deeper life satisfaction through my experience as a Kolbe-certified consultant, an advocate for the Entrepreneurial Operating System (EOS), and a past participant in Dan Sullivan's Strategic Coach program.

In addition, I have been privileged to help create the following philanthropic organizations:

- **The Financial Literacy Coalition of Minnesota** (through the Minnesota Council on Economic Education) <https://www.mcee.umn.edu/news/flcm>
- **The Financial Matters Program** (through Best Prep) <https://bestprep.org/financial-matters/>
- **NECHAMA**-Jewish Response to Disaster <https://nechama.org/>
- **The JCRC Speakers Bureau** (through the Jewish Community Relations Council of MN and the Dakotas) <https://minndakjrc.org/what-we-do/request-a-speaker/>
- **The Bias Inside Us** (through the Smithsonian Institution) <https://www.sites.si.edu/s/topic/0T01Q000000MBBrWAO/the-bias-inside-us>

As I begin my next chapter, I'm launching SteveLear.org as an interactive learning center for generosity planning, career development, and leadership training. It's a site where I can share personal wisdom and where members of the **SteveLear.org** community can exchange ideas and opinions – because I believe the wise person is the one who learns from everyone.

While I am honored to have won industry and community recognition for my work, my proudest achievements are personal. I am blessed to have the best clients in town, dear friends who tell me the truth, and a wonderful family. I am deeply grateful to the many people whose ideas challenge and motivate me to keep working to repair the world.

VALUES CARDS EXERCISE: The Core Values That Anchor Me

The Values Cards Exercise was developed by Doug Lennick and is found at the following site: <https://www.think2perform.com/our-approach/values>

FRIENDSHIP: Strong ties with family, friends, co-workers or members of a certain community.

COOPERATION: Placing importance on working together to achieve results; go along with a role.

JOY: Feelings of contentment, satisfaction and/or fulfillment.

HELPING OTHERS: Placing importance on assisting other people.

MEANINGFUL WORK: Doing and providing work that has a purpose and/or significance.

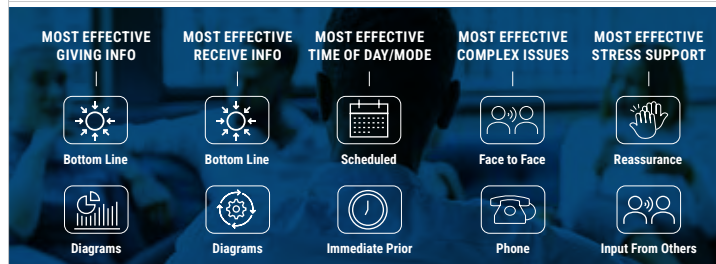
 **SteveLear.org**

Appendix 4B / Team Builder Profile™

Team Builder Profile™ Example / Page 2 of 2

COMMUNICATION BUILDER™: How I Like to Give and Receive Information

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KOLBE A™ INDEX: The Instinctive Way I Take Action

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• See the big picture • Simplify the solution • Condense the data	• Sustain systems • Identify inconsistencies • Adjust schedule/program	• Try things or experiment • Deadline driven • Brainstorm ideas	• Deal with the intangible • Describe without having to demonstrate • Simulate situations



Appendix 5

SHARED LANGUAGE FOR EFFECTIVE COMMUNICATION

When people share a language, whether spoken, written, visual, or body language, they develop an understanding that improves their communication.

Their interaction can be as simple as clarifying a term, or it may reach a level of engagement that takes months, or possibly years, to develop.

Collaboration relies on mutual respect, patience, tolerance, and a shared goal. When teams develop a working language as they collaborate, it helps to define terms and processes that reduce the need for translation. This agreement provides a consistent frame of reference for rigorous expectations. A shared, common language provides a focus for all stakeholders.

Shared language is most effective when teams develop it together, creating specificity that removes ambiguity. Instead of using broad adjectives open to interpretation, a common language must be very precise to focus the team's efforts. Shared language defines clear goals, resulting in a common understanding that can help to decrease project costs. Developing this language together is self-validating for the team members, making their contributions feel valuable.

Real understanding occurs when all parties are “on the same page.” This is especially true when people come from different disciplines or backgrounds. While shared language takes time to develop and nurture, it establishes an understanding that would not otherwise be present.

Thomas and McDonagh, Shared language: Towards more effective communication, 6 Australasian Medical Journal 1 (2013), pp.46-54. Published online 2013 Jan 31.



Appendix 6A / TRIP Roadmap

PART 1: VISION PLAN

NAME OF PROJECT

DESTINATION (What will it feel like and look like upon completion)

S.M.A.R.T GOAL

Specific: What specifically will we achieve?	
Measurable: How will we measure completion?	
Achievable: Can this be implemented?	
Relevant: How does it relate to our vision and goals?	
Time-Bound: What are key dates?	

TIMEFRAME

Start Date:	End Date:
--------------------	------------------



Appendix 6B / TRIP Roadmap

PART 2: ACTION PLAN

ROADBLOCKS (Prioritize key obstacles)

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

ROAD REPAIRS (Identify Best Strategies)*

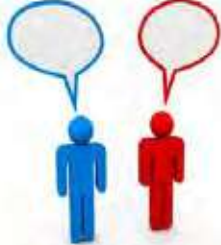
*Complete a SMART TRIP Strategy Planner to implement each strategy

RESOURCES FOR COLLABORATION

INTERNAL	EXTERNAL

Appendix 7 / Think Pair Share

THINK PAIR SHARE

	THINK About the Question	What do you know? What experiences have you had? What connections can you make?
	PAIR With Your Partner	Listen to hear. Share your ideas. Create new ideas together.
	SHARE Your Ideas with Others	Listen to hear. Share your ideas. Share your partner's ideas. Create new ideas together.

Appendix 8 / S.M.A.R.T. Trip Strategy Planner

S.M.A.R.T. TRIP STRATEGY PLANNER

NAME of TRIP STRATEGY written S.M.A.R.T.- ly

--

Specific: What specifically will we achieve? **Measurable:** How will we measure completion? **Achievable:** Can this be implemented? **Relevant:** How does it relate to our TRIP vision and goals? **Time-Bound:** What are key dates?

RESULT (what it will feel like and look like when the STRATEGY is completed)

ROADBLOCKS (obstacles to clear to complete the STRATEGY)

ACTIVITIES and TIMETABLE (to overcome the ROADBLOCKS)

Deadline	Describe Activities to Achieve Completion	Date Completed
	Stage 1:	
	Stage 2:	
	Stage 3:	
	Stage 4:	
	Stage 5:	

RESOURCES/DEPARTMENTS FOR COLLABORATION

Appendix 9 / Journal

JOURNAL: EXPERIENCE TRANSFORMER (by Strategic Coach)

Organization: Name:

Prepared By: Date:

1. Briefly describe the experience you'd like to improve and learn from.

--

2. What worked?

3. What didn't work?

4. Improvement Ideas: if you could do this experience over, knowing what you know now, what would change?

5. Create a series of actions that would produce a much more strategic, successful, and satisfying experience in the future.

6. Observations and Recommendations

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Appendix 10A / Creating a Ballot in Microsoft Forms

CREATING A BALLOT IN MICROSOFT FORMS, PAGE 1

To access Microsoft Forms, go to forms.office.com and sign in with your Microsoft 365 work credentials or Microsoft account (Hotmail, Live, or Outlook.com).

To begin designing a ballot, go to **My forms**, and select **create a new form**. You will be prompted to title the form and describe it. **Include space for the respondent's name on every form**. Click **add new** to see formatting options for your ballot questions:

- **Choice** – user can create multiple-choice questions with an unlimited number of possible options. The user can change the settings to allow respondents to select multiple answers.
- **Text** – respondents type their answers in a textbox. The user can select the maximum character limit for the answer.
- **Rating** – respondents answer questions on a number scale (up to 10).
- **Date** – user can include a field that lets respondents input a date.
- **Ranking** – respondents rank options (up to 10). All answers are collected, weighted, and ranked.
- **Likert Scale** – use this type of scale to gauge attitudes and opinions about a particular topic (like a matrix grid)
- **File Upload** – respondents upload a file into the form that will be recorded
- **Net Promoter** – On a scale of 1-10, respondents indicate how likely they are to recommend something to others.

The user has the option to **require an answer** to each question before the form can be submitted.

Once a form is created, click on the three horizontal dots in the top right corner to open the **settings** window. From the options, select the following choices:

- anyone with a link can respond
- accept responses
- get email notification of each response

Once the settings are complete, click **Share**. From the dropdown box, select **anyone with this link can respond**.

If the user wants respondents to collaborate, the **share to collaborate** link invites those with a link to **view responses and edit the form**.

Appendix 10B / Reviewing a Microsoft Forms Ballot

REVIEWING A MICROSOFT FORMS BALLOT, PAGE 2

Once you send out a ballot, you can look at the responses and analytics for the poll as follows:

- **responses tab** – click this to view a summary report of all responses with data visualizations. For more information about specific responses, hover the cursor over the visualizations or click **more details**.
- **view results tab** – click this at the top of the response page to see each respondent's answers
- **open in Excel tab** – click this to convert all the answers into an Excel spreadsheet with additional analytical options. Click the three dots above **open in Excel** for the following options:
 - > **create a summary link** that allows anyone with access to the link to view the results (this is different than the **share to collaborate** option; those with a summary link may only view and analyze the results, not edit them.)
 - > **delete all responses**
 - > **print summary**

To see a **ballot example**, click on the following link:

<https://forms.office.com/Pages/ResponsePage>

To see a **ballot example summary report**, click on the following link:

<https://forms.office.com/Pages/AnalysisPage>

APPENDIX 10C – Ballot Example

OUR CAMP BALLOT EXAMPLE, PAGE 1

***Required**

This form will record your name. Please fill in your name.

1. Our credit line is our reserve. What is considered a prudent level of reserve? It is recognized that we will be out of this credit line for 15 days each year. *

- ☐ 5% of budget
- ☐ 10% of budget
- ☐ 15% of budget
- ☐ 20% of budget

2. Which of the opportunities listed below would allow OUR CAMP to use debt? Eliminate any of the following and be prepared to discuss an amount of debt that could be used for the remaining opportunities. *

- ☐ Property
- ☐ Human Capital
- ☐ Programming
- ☐ Fundraising
- ☐ Legal fee to either protect or enhance the financial stability of OUR CAMP
- ☐ A perceived temporary drop in enrollment (revenue)
- ☐ The hiring of assistance for long term strategic planning, building team health, organizational board development and improved organizational decision making

Association/Foundation Relationship

3. Is the Association mandated to request funding from the Foundation first, recognizing the Foundation may need to request that some restricted funds become unrestricted, before exploring debt options? *

- ☐ Yes
- ☐ No

4. If the Association is not mandated to ask the Foundation first, can the Association use debt without the approval of the Foundation? *

- ☐ Yes
- ☐ No

APPENDIX 10C – Ballot Example

OUR CAMP BALLOT EXAMPLE, PAGE 2

Please answer the following questions. We will be gathering this information to assist us.

5. Is the best policy no debt but the existing line of credit? *

- ☐ Yes
☐ No

6. Debt with a limit of _____ (this could be a dollar amount or a percentage of assets) *

7. Allowable term of the debt _____ (in years) *

8. What would be the highest allowable interest rate to be charged? _____ *

9. What % of OUR CAMP assets can we use as collateral? _____ *

10. What are OUR CAMP assets? Please select all items that you would NOT consider to be assets. *

- ☐ foundation investments
☐ foundation pledges
☐ association pledges
☐ the vacant land at the camp
☐ the camp itself
☐ equipment

Back

Submit

APPENDIX 10D – Ballot Example Summary Report

BALLOT EXAMPLE SUMMARY REPORT, PAGE 1

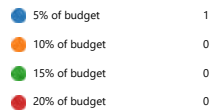
1 Responses 01:43 Average time to complete Active Status

1. Please Enter Your Name

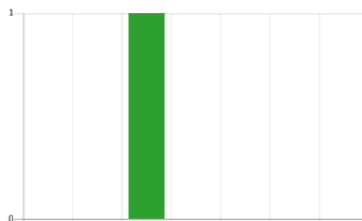
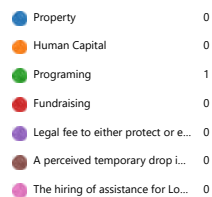
0
Responses

Latest Responses

2. Our credit line is our reserve, what is considered a prudent level of reserve? It is recognized that we will be out of this credit line for 15 days each year.



3. Which of the opportunities listed below would allow OUR CAMP to use debt? Eliminate any of the following and be prepared to discuss an amount of debt that could be used for the remaining opportunities.



4. Is the Association mandated to request funding from the Foundation first, recognizing the the Foundation may need to request some restricted funds become unrestricted, before exploring debt options?



5. If the Association is not mandated to ask the Foundation first can the Association use debt without the approval of the Foundation?



6. Is the best policy no debt but the existing line of credit?



APPENDIX 10D – Ballot Example Summary Report

BALLOT EXAMPLE SUMMARY REPORT, PAGE 2

7. Debt with a limit of _____ (this could be a dollar amount or a percentage of assets)

1
Responses

Latest Responses
"50000"

8. Allowable term of the debt _____ (in years)

1
Responses

Latest Responses
"3"

9. What would be the highest allowable interest rate to be charged _____?

1
Responses

Latest Responses
"5"

10. What % of OUR CAMP assets can we use as collateral _____?

1
Responses

Latest Responses
"25"

11. What are OUR CAMP assets? Please select all items that you would NOT consider to be assets.

- Foundation Investments 1
- Foundation Pledges 1
- Association Pledges 0
- The vacant land at the camp 0
- The camp itself 1
- Equipment 0
- Other 1

