



Clear Impact

Simple truths. Consistently applied.

Leader Agreement

Our intention is that all our work have a lasting and positive impact. We want you and your organization to be wonderfully successful. We've come to recognize that having clear and mutually understood agreements with our organizational clients is an important factor in optimizing sustainable results.

Aligning Your Culture

Ed Schein is perhaps the preeminent theorist and practitioner on organizational culture. He makes it clear that what forms and then evolves culture is what senior leaders pay attention to including what they model and what they hold themselves and others accountable for, Formal mission, vision and value statements matter little. What does matter is what senior leaders measure and reward, how they allocate resources, who gets status and attention, who gets promoted, etc. Therefore, what's required of you as a senior leader to optimize success?

- Ensure mutual understanding of the desired outcomes, first with us, and then with the overall organization/team.
- Hold yourself accountable to align your words, behavior, and actions with these desired outcomes.
- Have ongoing dialogues with us to ensure mutual agreement about what this means, in practical and real terms.
- Commit to an ongoing practice of reflection, regularly stepping back to think about what you have said and done that is aligned with, and not aligned with, desired outcomes.
- Commit to actively seeking feedback on the extent of your alignment with these goals.
- Commit to some variation of our [Making it Real](#) process. From a systemic approach it's vital to first see your organization or team as a system, rather than as a collection of individual departments or leaders. Optimization needs to first happen on a systemic level.
- Understand that evolving your culture requires ongoing attention over an extended period of time, and commit to work collaboratively with us for at least one year.

Introduction of Tools

We have many capacity-building models and tools. The ones we use most frequently are Perspective Taking & Seeking, Levels of Development, Complexity, Polarity Management and the Enneagram. See [Our Tools](#) for a description of many of them. We do not want to introduce any tools that will not be integrated into your organizational culture. For this reason, we ask that you first understand each tool we are suggesting and have us introduce each only if are you fully committed to supporting its implementation. This includes agreeing, for each tool, to:

- Commit to deeply understanding the tool.
- Collaborate with us on a plan for successful implementation.
- Build collective reflection and application into your team meetings.
- Ensure ongoing individual reflection and application, first for you, and then for the rest of the team.
- Build it into your team's performance agreements.
- Integrate its language into your leadership vocabulary.
- Not introduce potentially competing models without at least talking to us about it.

Your Own Development

Senior leaders set the tone for everything that goes on in their teams and organizations. From our perspective it's vital you set a context in which ongoing individual and collective development is **required**, not just "invited." To set this context with integrity you must be walking the walk as well as talking the talk. We ask you to be committed to:

- Working with your team/organization to optimize systemic success. As previously mentioned, please see our blog post on [Making it Real](#) for details.
- Identifying your strengths and challenges in effectively carrying out your role, as well as this current change initiative. We generally assist this process by conducting confidential interviews as well as using a 360-degree feedback instrument.
- Creating a development plan based on these strengths and challenges. This post describes what we see as [Essential Elements of an Effective Development Plan](#).
- Engage in ongoing coaching.
- Set a structure for ongoing daily reflection. Iterative cycles of action and reflection are crucial for building and sustaining development.

Partnering With Us

We see ourselves as partners and collaborators, not “venders of services” and know that our consulting relationships go best when that’s a common understanding. This includes:

- Commitment to an ongoing relationship. Integration of new learning takes time, on both a collective and individual level, with many iterative cycles of action and reflection. Awareness ≠ Change. One or two workshops, no matter how powerful, have little lasting impact. By working with us you understand that an ongoing relationship is crucial for lasting change.
- Commitment to not change directions (e.g. using other consultants) without first dialoguing with us about it.
- Cultivate a willingness to be vulnerable and open to new perspectives, as well as to cultivate the practice of individual and collective reflection. See [Are you our ideal organizational client?](#) Let us know whether you are not aligned with anything we’ve written here.
- Keep communication channels open. We both agree that we’ll respond to any communications within 24 hours. In some circumstances this communication could be, “I’ve received your question but can’t get to it for a couple of days. I’ll respond by ____.”
- 24-hour cancellation policy for any meetings. 25% charge for any workshops cancelled within one month of the scheduled delivery date, and 50% for any cancelled within one week of the scheduled delivery date.
- Your commitment that you’ll communicate directly with us if you have any questions about the quality or benefit of the work we’re doing together.
- An agreement that there will always be a termination session should either of us decide that it is not beneficial to continue the relationship for now.

Print Name: _____ Date: _____

Signature: _____

Dr. Sandra Hill

Date

Dr. Joel Rothaizer

Date