Establishing Psychological Safety

(during change)

Rich Theil

CEO of The Noble Foundry

- 7 Years at P&G
- 12 Years as CIO at Crossroads
- Husband, Father of 3 teen+ children
- Transformations, Coaching & Training (SAFe)

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Played for 45 minutes, made $30 in tips.
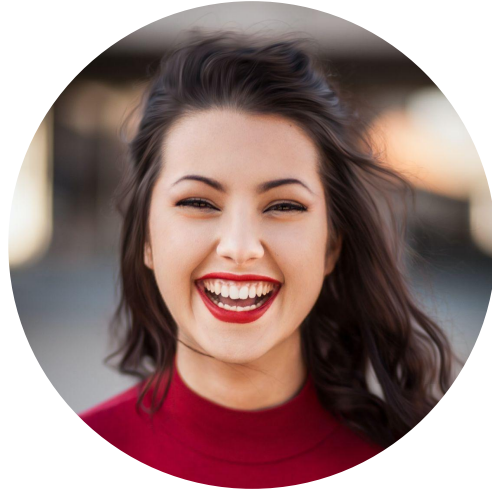
Story courtesy of Joseph Bonner: https://www.linkedin.com/in/joseph-bonner/

Psychological Safety During Team Change

Definition | Why it Matters | How to Build It | Respond to Change

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A Tale of Two Onboardings

Jenny

Susan

Freedom to make a mistake
(without being seen as incompetent)

Freedom to challenge your manager's thinking.
(with the expectation that you won't damage what they think about you)

Freedom to talk about unrealistic expectations
(without being seen as sandbagging and lazy)

Freedom to improve.
Individuals | Teams | Organizations

Freedom to point out a colleague's mistake
(with the understanding that we're here to improve things together)

Freedom to share a half-baked idea
(without being seen as ignorant)

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Safety has a recursive relationship with:

- Candor
- Transparency
- Vulnerability
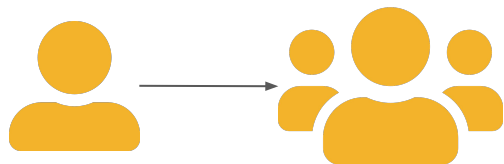- Bigger goals
- More difficult challenges
- More accomplishments

- Safety ≠ Being nice
- Safety ≠ Comfort
- Safety ≠ Extraversion
- Safety ≠ Avoiding conflict
- Safety ≠ Being quiet
- Safety ≠ Being polite

Safety = Freedom to improve.

When You Join a Team

We manage our image
(for ourselves and others).

Silence is almost always safe.

Nobody wants to call anyone's baby ugly.

First Impressions Matter.

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"I'm new and need my
first thoughts to be valued"
(so I hold off on saying anything until I'm 100% confident)

"I wonder why they do it this
way. There is a better way"
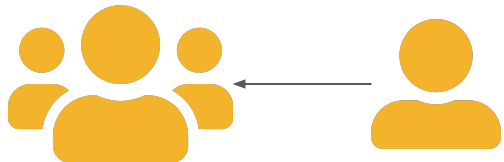(but I won't say anything because I don't want
to create the wrong first impression)

"I'm only 60% confident that
my idea will help"
(so I say to myself "I'll bet they already thought of that")

When Someone Joins Your Team

We're evaluating people that are new to our team.

We tend to not trust people we don't know.

We might feel threatened.

We don't want anyone to upset the apple cart.

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"Do they really have the skills they said?"
(so I test them a bit to see if they've got the chops)

"What if they're better than me?"
(so I position myself just a little)

Are they going to be easy to work with?
(so I get defensive when they present their new idea before they've earned respect)

Fear shuts down your brain

creativity ~~creativity~~

innovation ~~innovation~~

ideas

motivation ~~motivation~~

freedom ~~freedom~~

do the right thing ~~do the right thing~~

ALL SPIN AND TUMBLE?

Procter & Gamble's stock price

https://www.imdb.com/title/tt14113790/

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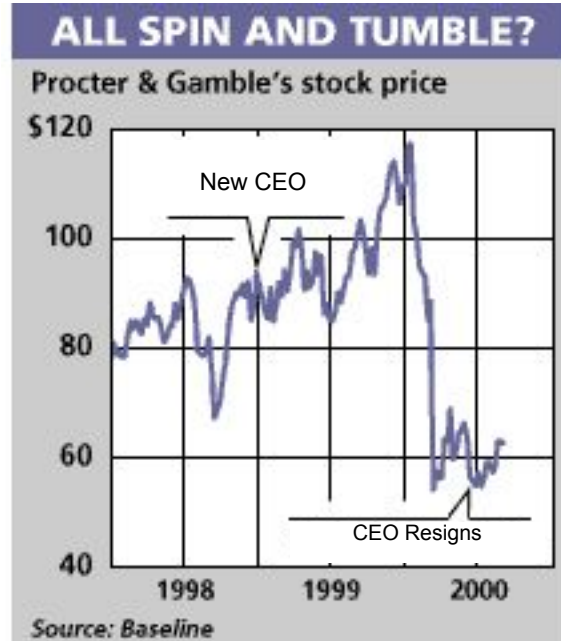
- Aggressive pressure to cross-sell
- Employees anxious
- Opened accounts in customer's names
- Opened fake accounts

Two Models

Developing Psychological Safety

- Team changes
- Evaluating current levels of psychological safety

Provides a map and language to help us level up.
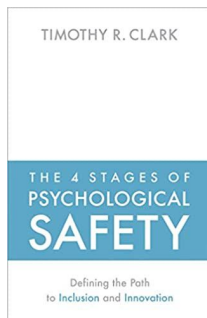
Responding to Change

- Significant change in organizational direction
- Pandemics / Hybrid / etc

Facilitates the 4 Stages during change.

What would it feel like for you to join this team?
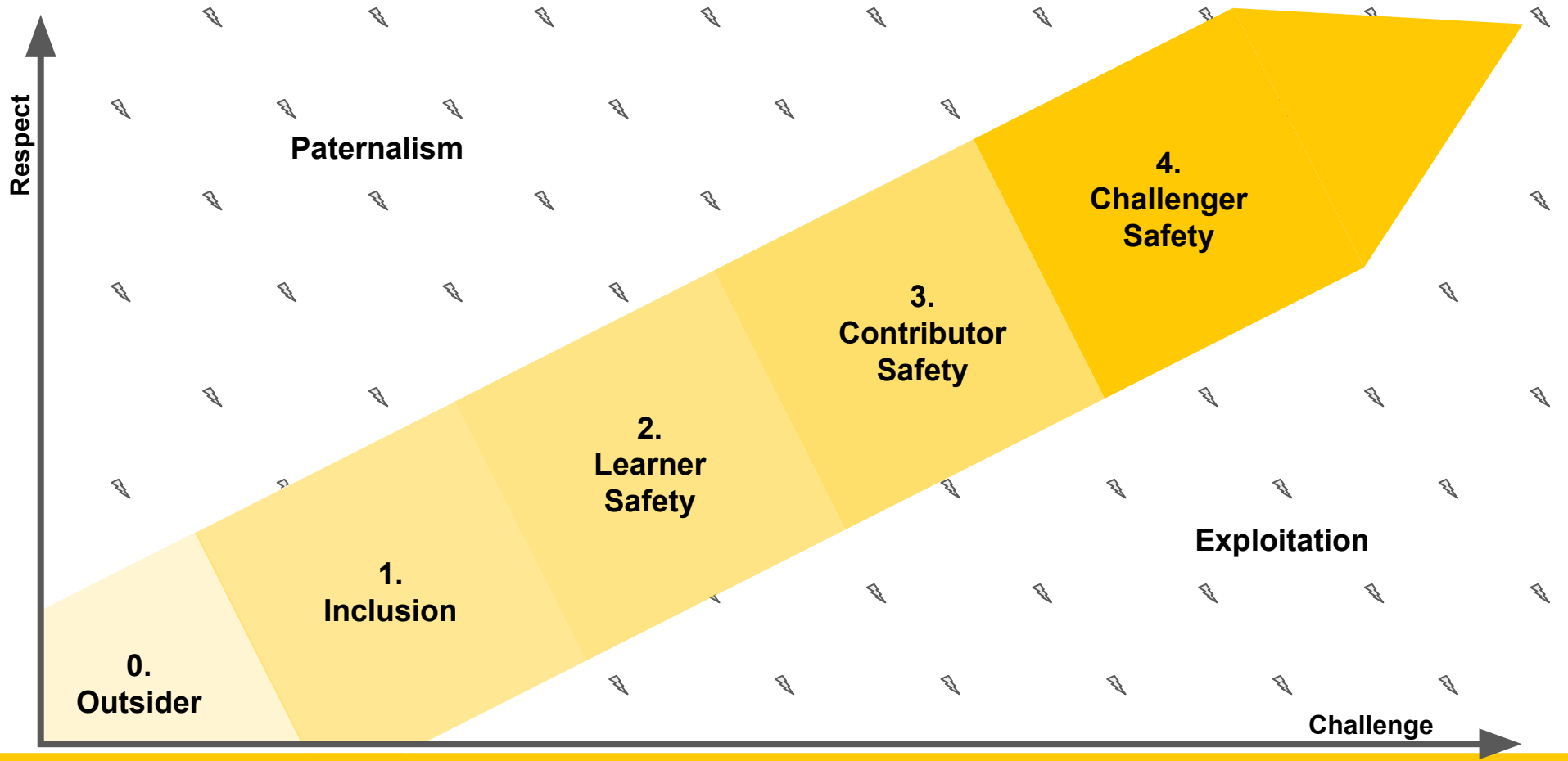
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Respect

Paternalism

4.
Challenger
Safety

3.
Contributor
Safety

2.
Learner
Safety

1.
Inclusion

0.
Outsider

Exploitation

Challenge

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0. Outsider

1. Inclusion

2. Learner Safety

3. Contributor Safety

4. Challenger Safety

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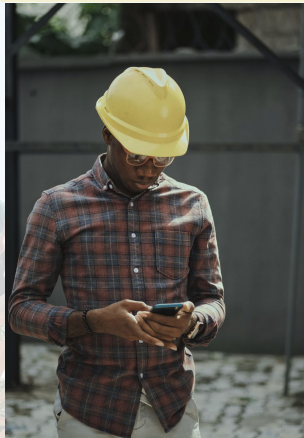
We Need to be *Great* at this Process

0.
Outsider

1.
Inclusion

2.
Learner
Safety

3.
Contributor
Safety

4.
Challenger
Safety

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Virtuous Cycle
Builds the ability to make better products.

Vicious Cycle
Destroys the ability to make better products.

New to the team

Do / Say Something

Team Responds

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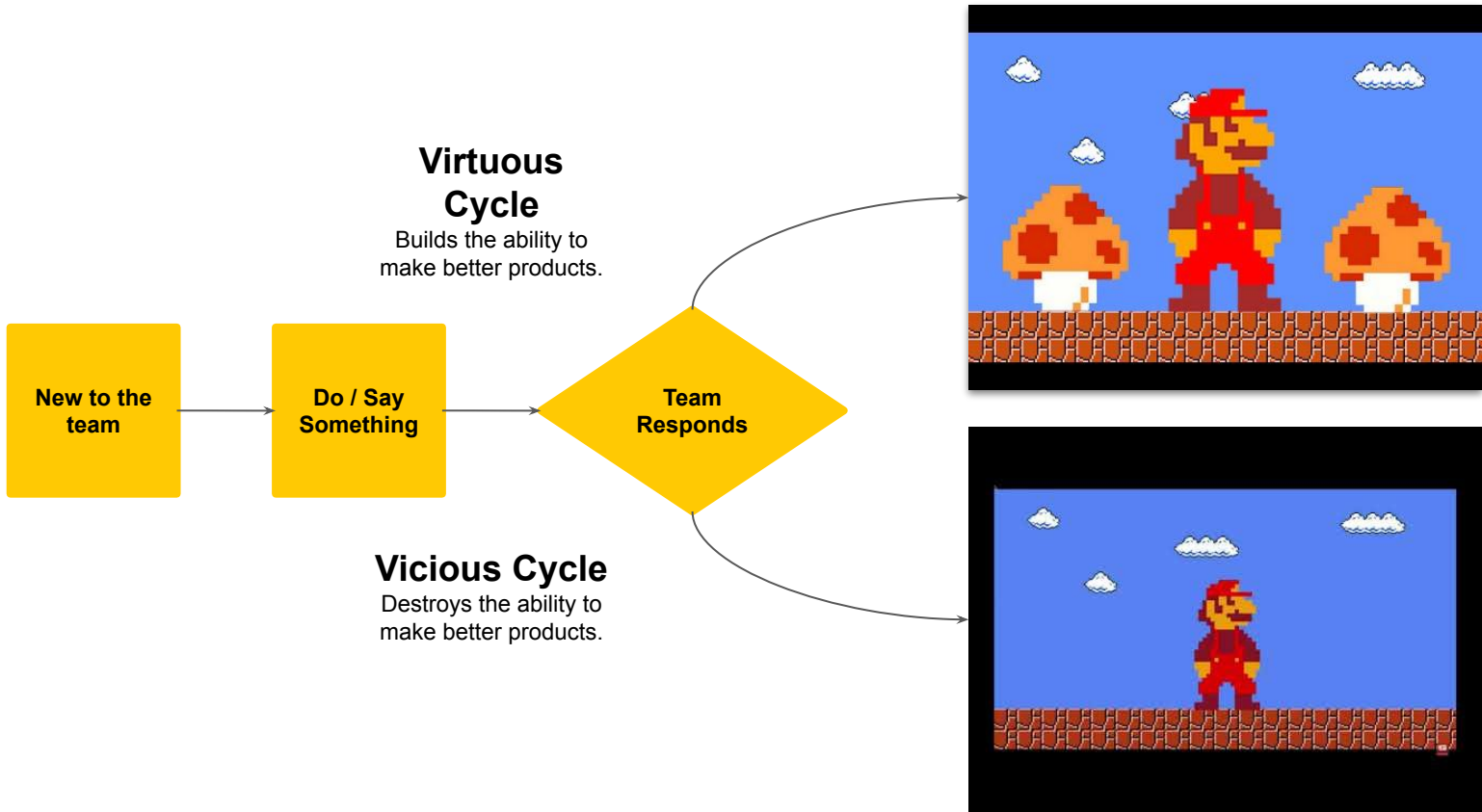
1. Inclusion

Iterate to the best possible onboarding experience

- **Establish system access before they arrive**

- **Invest 10 minutes introducing everyone**

- **15-minute 1:1's with every person on the team**

Establish Relationship Norms

- **Establish team relationship norms (free download to help)**

- **Walk every new team member through your norms**

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2. Learner Safety

Help them Ask Questions

- Set aside your own ego so they have room
- Respond to questions as a trainer or coach

Give Permission to Grow

- Explicitly tell them it's ok to not know
- Admit a mistake within their first 3 days

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3. Contributor Safety

Encourage their Ideas

- Ask for their thoughts, then react with "yes, and..." even if you think it won't work

- Explicitly thank them for their ideas

Lead with Curiosity, not Blame

- When they make a mistake, seek to understand what happened.

- Applaud when someone admits a mistake (create room to be imperfect)

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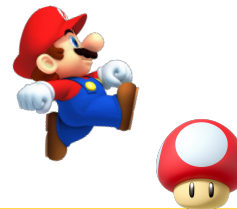
4. Challenger Safety

Nurture the Brainstorming Process

- **Drop your ego and let their ideas be better than yours**

- **Help them make their early suggestions good ideas**

- **Ask them how they might improve your ideas**

Let it Breathe

- **Respectfully challenge others while caring for them and their ideas**

- **Respond to setbacks publicly**

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We can be *Great* at this Process

0.
Outsider

1.
Inclusion

2.
Learner
Safety

3.
Contributor
Safety

4.
Challenger
Safety

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A Model for Team Maturity

| 0. Outsider	1. Inclusion	2. Learner Safety	3. Contributor Safety	4. Challenger Safety
We barely talk to each other.	We're a collection of individuals.	We learn things together.	We collaborate to create value.	We have high trust in each other.
We isolate from each other.	We're not yet a team.	We share what we learn.	We feel like a team.	We are a team to be reckoned with.
		It now feels a bit like a team.	We avoid challenging each other.	We respectfully challenge each other.

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Two Models

Developing Psychological Safety

- Team changes
- Describing current levels of psychological safety
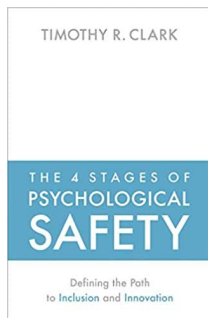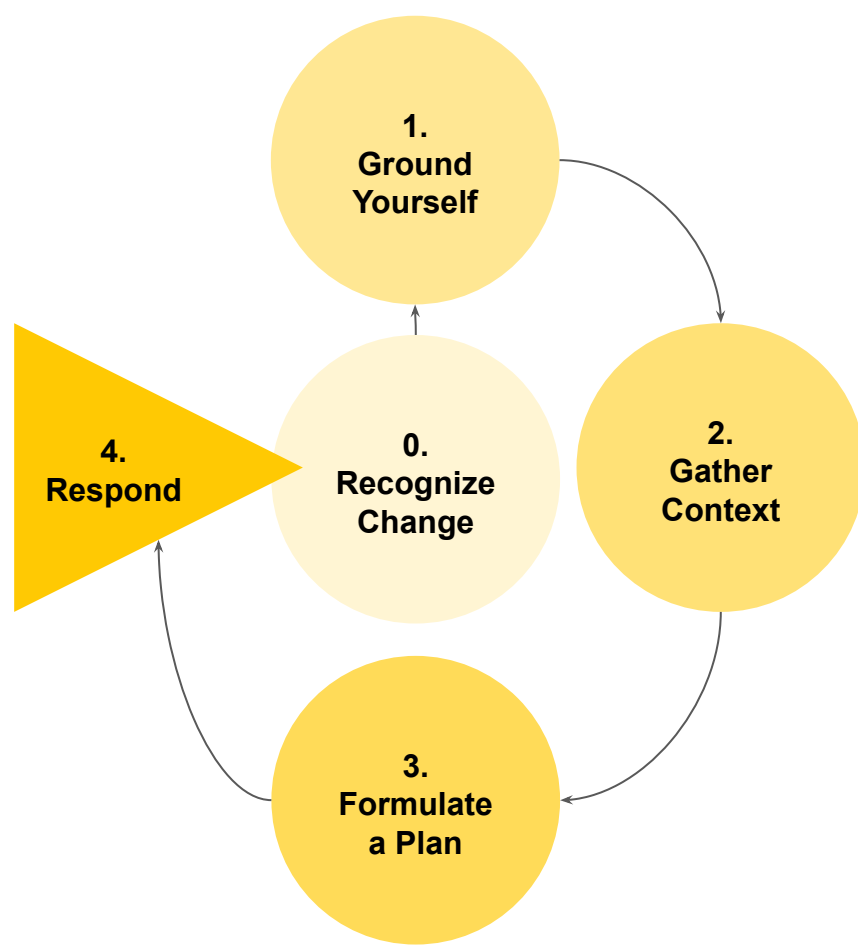
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Facilitates the 4 Stages during change.

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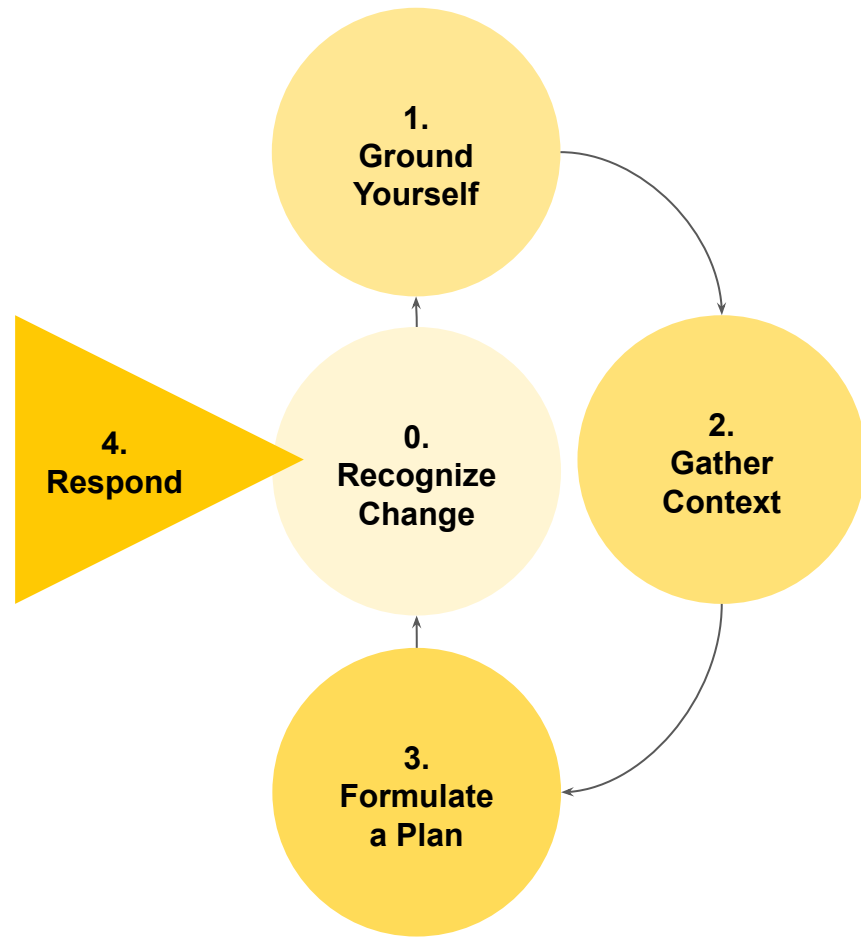
1.
Recognize
Change

2.
Ground
Yourself

3.
Gather
Context

4.
Formulate
a Plan

5.
Respond

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1.
Recognize
Change

Take Courage

- **Look the change in the face (reflect)**
- **Calm yourself**

Create Space

- **Give room for everyone to share how they feel about the change (seek authenticity)**
- **Vulnerability begets vulnerability**

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FOUNDRY

2.
Ground Yourselves
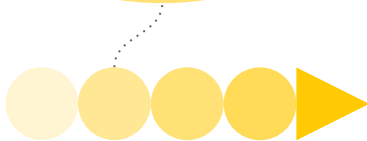
Remind Yourself

- **Remind yourself of your bigger picture why. What really matters in your personal life.**

- **Re-read the strategies for your company – mission, vision, strategies, goals, etc.**

Remind the Team

- **Discuss mission, vision, and strategies**

- **Reinforce team norms**

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2. Gather Context

Take a Personal Inventory

- **Make a list of things that stay the same / change**

- **Acknowledge the unknowns**

Discuss Team Inventories Together

- **90 minutes to talk about what each of you sees**

- **Bonus points for vulnerability. It's ok to cry.**

4. Formulate a Plan

Develop Your Plan

- Reflect on what matters most to you personally?

- Identify ways this change be used for good?

Take Courage Together

- Embrace the change by formulating forward-moving experiments (don't let fear win)

- Incorporate ways to remain empowered
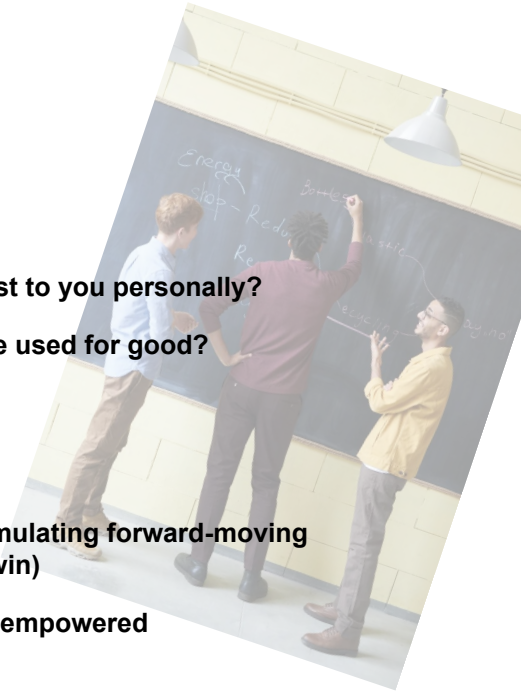
5. Respond

Take Action

- **Run your experiments then reflect**

- **Ask them how they might improve your ideas**

Leverage the Power of Mistakes

- **Keep admitting your own mistakes and talking about what you learned**

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Expect to Repeat It
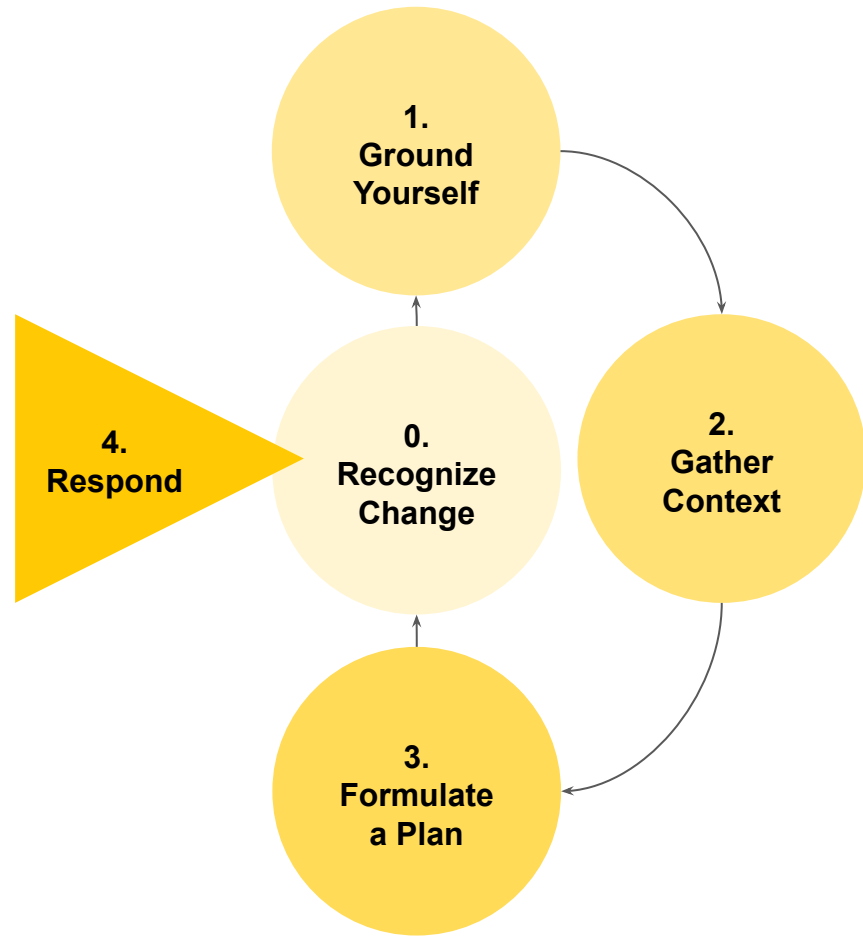
1. Ground Yourself
2. Gather Context
3. Formulate a Plan
4. Respond
0. Recognize Change

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Tools to Help

I Promise | 4 Invitations | Retro Board | Workshop Board

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Tool 1: "I Promise"

Team Agreements

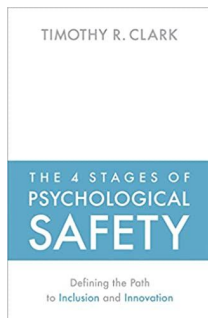Describes procedures such as decision-making processes, how to get support, and the tools and communication methods that the team uses.

+

I Promise

Added to Team Agreements to describe relationships, how to deal with conflict, degrees of trust and places we are trying to grow together.

- Define how the team deals with conflict
  (agreeing on how to handle conflict makes things easier for all)

- Directly communicate how you relate to one another
  (talk through it with new people)

- Commit to it
  (Sign it and make it mean something.)

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as a <your team name> team member

I PROMISE…

Main summary phrase of I Promise statement followed by additional details of I promise statement to ensure everyone is clear with the intent.

(repeat as necessary)

Examples:

TO LEAD THE CHANGE. I understand that I am responsible for team culture and the quality of the work my team produces. I also recognize that my voice matters and I will use it to improve the way we work together.

TO GO DIRECTLY TO THE PERSON I have a concern with prior to enlisting support from other people. If after the initial conversation, I still do not feel right, I will ask someone to go with me to resume the conversation. If after that interaction I have not been satisfied then I will engage the team(s) involved. If the concern remains unresolved I will share with leadership and seek their guidance, possibly bringing to the entire team if appropriate.

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Tool #2: 4 Invitations Reminder Sheet

4 Invitations to Psychological Safety

4. Challenger Safety

Invite them to Make Changes
- ☐ Always: Drop your ego and focus on learning & growing, not winning
- ☐ Their First Suggestion: Help them make it a good idea (if it isn't one yet)
- ☐ Your First Suggestion: Explicitly ask them how they might improve it
- ☐ Mistakes: Keep celebrating mistakes and sharing what you learn

3. Contributor Safety

Invite them to Add Value
- ☐ Brainstorming: Ask for their thoughts, then react with "yes, and..."
- ☐ Brainstorming: Explicitly thank them for their contributions
- ☐ Mistakes: Seek to understand, not to blame
- ☐ Mistakes: Applaud when people admit them (create room to be imperfect)

2. Learner Safety

Invite them to Ask Questions
- ☐ Always: Set aside your own ego, so they have room to learn
- ☐ First 3 Days: Admit a mistake and share what you learned
- ☐ 1:1 Conversations: Explicitly tell them it's ok to not know and to learn
- ☐ Anytime: Respond to questions as a trainer or coach, not a superior

1. Inclusion

Invite them to the Team
- ☐ Onboarding: Establish system access before they arrive
- ☐ Onboarding: Invest 10 minutes introducing everyone
- ☐ Onboarding: Schedule 15-minute 1:1's with every person on the team
- ☐ Onboarding: Walk them through team relationship norms

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- Key activities and behaviors

- Simple checklist

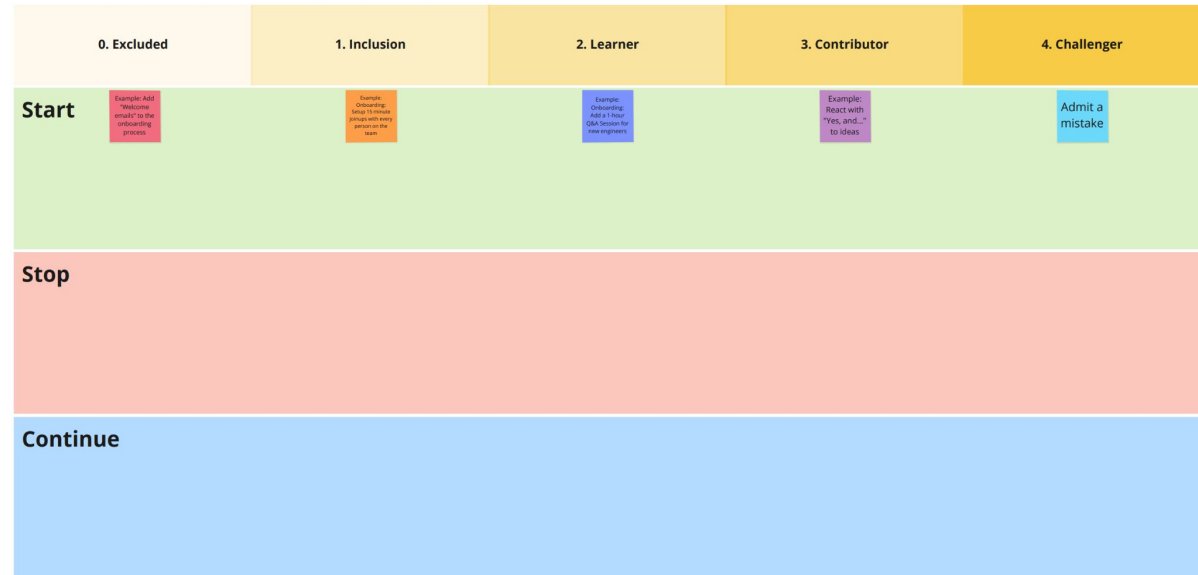- Accelerates journey to psychological safety

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Psychological Safety Workshop Board (Miro)

- Helps create conversation in your current team

- You control the degree of challenge
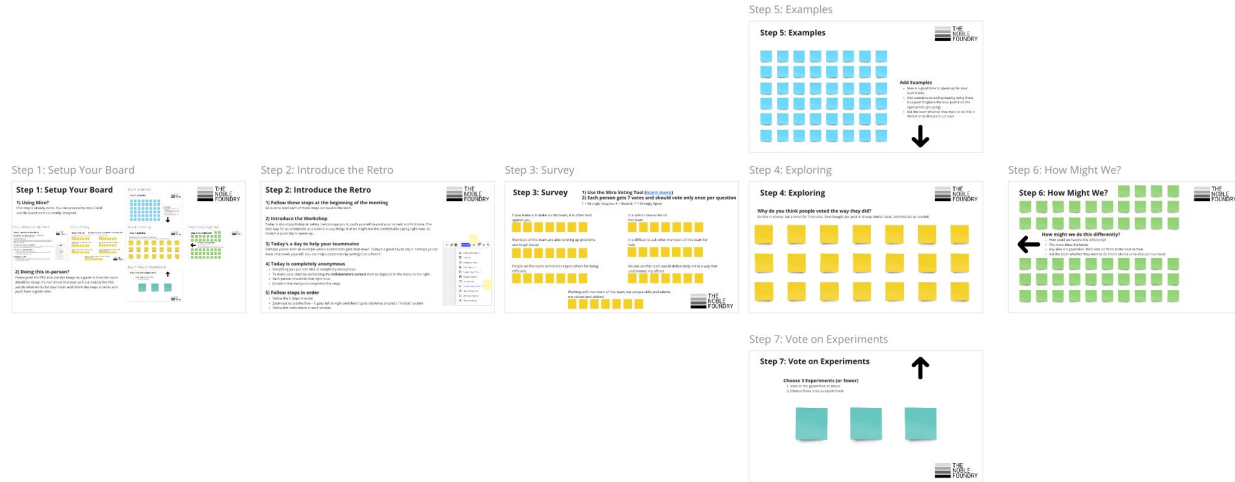
Psychological Safety Retro Board (Miro)

- Helps create conversation in your current team

- You control the degree of challenge

Download all 4 free Tools

- Example "I Promise"
- 4 Invitations
- Psychological Safety Workshop board
- Psychological Safety Retro board

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