

Cindy ([00:00:00](#)):

Thanks, Olivia, and welcome, everybody. I'm watching the chat. It's flowing very quickly, and we'll talk about that in just a minute, but I've seen folks from coast to coast, some of the Pacific Islands, Puerto Rico, so we are spreading across the US. So it's great to see everybody on behalf of NACHC, welcome to the webinar series. As I said, you can see there's a packed house and a lot of people in the room, which is really exciting, but also means that that chat box is going to scroll very quickly. Feel free to use it as much as you'd like throughout the session, communicate with us and your peers. We will do our best to take a look at questions, and if we cannot get to them during the event, we will develop an FAQ. We can download the chat afterwards so we can get to it when it's not scrolling, and we'll make that available with the recording for you.

Cindy ([00:00:56](#)):

While we're not going to be using breakout groups today, we will keep you very engaged. There are opportunities for reflection work in that notebook, so I'm going to ask Olivia to drop that workbook into the chat for you. If you didn't get a chance to download it ahead of time, you'll see a PDF pop up in the chat window for you to download that. So we will keep you active throughout the next hour and a half with using that workbook.

Cindy ([00:01:25](#)):

With that, I have the honor of introducing you to our faculty today. Jennifer Hughes is the vice president of CEEK and is a NACHC partner, offering coaching services to health center staff, along with this webinar and some other workshops that we've done together. Jennifer is an international coach federation and resilient leadership certified coach and focuses her workshops and presentations on topics like communication, collaboration, leadership, culture, and wellness. With experiences such as being a chief people officer and over 500 coaching hours and a few years now working with NACHC and health centers in some of our PCAs, she's going to lead us through transitioning to leadership today. So welcome, Jennifer.

Jennifer Hughes ([00:02:14](#)):

Thank you. Cindy, do you want to go through-

Cindy ([00:02:22](#)):

You can go ahead and get started. We have included the strategic pillars for NACHC just to give you some awareness about where our focus and our alignment is and the NACHC mission.

Jennifer Hughes ([00:02:31](#)):

Perfect.

Cindy ([00:02:31](#)):

That's part of your workbook, but we will save our time for Jennifer to go through our sessions.

Jennifer Hughes ([00:02:37](#)):

Awesome. Thank you, Cindy. I'm excited to be here. I will admit I'm also a little overwhelmed. There is a lot of stuff coming through the chat. I can't even see how many participants are on here. Don't tell me because that probably make me even more nervous. But I am super excited to be here. Transitioning

into leadership is an interesting step in one's career path. So I think whether you're new to leadership, maybe you're in a new leadership role, maybe you've been in leadership for a long time, or maybe you're just curious about what your next step might be if you were to move into a leadership role in the future, I think there will be some nuggets from this 90 minutes together that you can take away.

Jennifer Hughes ([00:03:20](#)):

As Cindy mentioned, and I keep seeing the chat so I'm just going to close it, Cindy will let me know if something comes up, that there's a lot of you on today. So we will have the chat going. Cindy will try to ping me if something comes in, but we are going to do this session in a way that I'm going to call it we're intimate, pretend like we're one on one here. I am going to have you go into the workbook often, and if you don't have the workbook or you're having problems with that, if you just grab a piece of paper. There will be times where we will do some personal reflections. I will actually give you space to do that personal reflection. So there'll be a prompting question. I want you to take the time to write that down.

Jennifer Hughes ([00:04:04](#)):

There's also some other activities that we'll do in here that will require you to kind of think on your own, write some things down. So I highly encourage you to either have the workbook and or just a piece of paper and a pen or pencil handy so that you can participate in that. The workbook is a fillable workbook, meaning that it's pdf, but you have the ability to type in the sections where we will do those personal reflections. So I will, again, time those. We were talking earlier, we don't have a timer countdown, but I will be your timer countdown. So when we get to those, I will put my timer on and let you know when we're getting close to that.

Jennifer Hughes ([00:04:43](#)):

I actually believe that what you put in today is what you will get out of the next 90 minutes. Meaning, if you have the opportunity to take this 90 minutes and really dedicate to being in the space, really doing the reflections, I think you will get a lot more out of today than not engaging in that piece. So I'm just going to highly encourage you to engage. If you find yourself being pulled in multiple directions, then know that that workbook is there for you to spend time on that later, that if you want to get more thoughtful about some of these questions, you can. So I'm going to jump us in.

Jennifer Hughes ([00:05:20](#)):

So this is what we're doing today. We really want to talk about how do you transition from being the doer to being a leader of teams. How can you increase some of your confidence around that? Learn some new tactics as it relates to the uncomfortable but oftentimes always happens. You got promoted and now you're leading people that you used to work closely with. So leading those former peers a little more comfortable. And then we'll actually dive into a tool to help you better organize your to-do list so that you can, one of the key things about moving from doing to leading is delegation. So how do you determine what are those things that you can then delegate to others and how can you do that more effectively? So that's really what we're trying to do in our time together.

Jennifer Hughes ([00:06:08](#)):

Our agenda is what I call a rough agenda, meaning we will somewhat spend our time in these areas based on what we put here. We've done our welcome and overview. We'll move into from doing to leading, then we'll transition into that awkward leading former peers and then go into the delegation where we're going to learn a little bit more about a tool that you can use to help you delegate with more

confidence. And then we'll wrap up, and Cindy will finish us off with some next steps including the future sessions that we'll have.

Jennifer Hughes ([00:06:43](#)):

All right. So first thing, let's talk a little bit about the historical view of traditional roles in the organization. And just know this is representative of what we would consider traditional organizational roles. I'm not sure this is representative of the hierarchy you have in your organization, but I just want to call it out as traditional. You might have somewhat similar. It might look a little different in your organization. But what we really want to get across in this is that you're a leader no matter what role you're in. So what tends to change, and there's a great quote by Mary Parker Follett, who wrote the Creative Experience, that says, "Leadership is not defined by the exercise of power but by the capacity to increase the sense of power among those led. The most essential work of the leader is to create more leaders."

Jennifer Hughes ([00:07:37](#)):

I think the key piece of leadership and what changes as you go across or as you increase your role or move up in the organization, if you will, is this bottom box here. It's, you increase your authority in regards to how much you have authority over, what you're making decisions over, sort of this power, if you will. You increase your breadth and your depth and your scope. And that's kind of what increases as you go higher in the organization. I'm not a fan of talking about hierarchical structures, but they do exist. But as you get more of that scope and power and things like that, you're usually moving further up in the organization. I think the key for me, and what I want to get across on this, is that you are a leader no matter what role you sit in right now. Whether you're executive or whether you're an individual contributor, you are a leader. And so to exercise that as best you can. And do know that there are limitations to that leadership depending on the role that you're in the organization.

Jennifer Hughes ([00:08:41](#)):

So let's move on and talk about moving from this individual contributor to this leader role and how we can do that. So most of the time you get promoted from that individual contributor role to a supervisor role or a team leader role because you were really good at what you were doing, but you were not necessarily leading other people. So when we're doing something, it involves things that we're good at, we feel comfortable doing. It's like that go-to activity we do. Leading is a little bit different because leading's about making sure your team is positioned to be successful. And this is both as a group, as a team, an intact team, but also being successful as an individual.

Jennifer Hughes ([00:09:30](#)):

I don't think this is always an easy jump for folks, especially when they've been validated for all of the doing that they have done. Now they have to transition into leading other doers. I want to be cautious here. This does not mean that getting into a leadership position means you no longer are doing things. I want to be very cautious about that. You will continue to be a doer. You just need to look at what requires my doing versus what can be done by others. What is something that requires my specific skillset so I need to jump in and do that versus where do I have that authority, power, ability to delegate to others. And that's where we're going to get into.

Jennifer Hughes ([00:10:16](#)):

So a big part of this moving from being a doer to a leader is all about the mindset. If I can remove myself out of that, I need to do because that's how I am recognized versus I need to support others or I need to grow others so that they can reach their goals and reach their potential. That takes a shift in the mindset to do. So we're going to get to our first reflection where I want you to think about some of this doer versus leader. So I'm going to give you three minutes, actually, I'm going to give you two minutes to do this one. I want you to think about... And again, you can use your workbook or you can just jot down notes on a piece of paper if it's easier for you to do that.

Jennifer Hughes ([00:11:04](#)):

So again, the first question, just what did you like the most about doing? What do you like the least about being a doer? Second question, what do you like most and least about leading? So what do you like about that leading other people? And then what do you believe helps or hinders your ability to balance that doing and leading? Remember, I said, just because you became a leader doesn't mean you're not doing. It just means you got to figure out what is it that requires my doing. So I'm going to give you two minutes. This is where I time it, so I'm really going to give you a full two minutes here. I'll let you know when we get a minute left and then I'll do a bit of a countdown for you. So go ahead and do that. We have about a minute left. Again, if the workbook is difficult because you're looking at the screen, just take a piece of paper, jot down some notes for these questions. Just take about 10 seconds to wrap up your thought. We're going to keep us going here.

Jennifer Hughes ([00:14:06](#)):

So we're going to talk about getting on the balcony. So I talked about this mindset change, but we also want to talk about how do you get on the balcony, how might you shift your perspective a little bit, maybe gain some greater clarity to the work you're doing. And I'm going to do a quick video on this that will hopefully start on its own here.

Speaker 3 ([00:14:29](#)):

Concept of the dance floor and the balcony is important to understand when you're a manager. When we talk about the dance floor, it's being in the middle of everything where all the movement is. When you're on the dance floor, you can only see the people who are next to you and maybe a little beyond you. Managers need to go up on the balcony and look down on the dance floor. From this view, you can see everything that is going on. You can see where people are very busy dancing or where they're just hanging out. If you stay on the dance floor all the time, you will never get that bigger view. And there are times when you need to take your team members up to the balcony so they can see the bigger picture. Remember this concept and it will serve you well. When do you need to get off the dance floor and get on the balcony? For more information about BetterManager, go to [bettermanager.us](http://bettermanager.us).

Jennifer Hughes ([00:15:40](#)):

All right. So the video might be a little cheesy, I'm not going to lie there, but I think you'll get the concept of what they mean. You need to be able to expand your perspective and what you can see. If you're able to get yourself up on the balcony, you can see more, you can see further, you can be more strategic because you're able to see those things. We want you to really get curious. Observe yourself, others, and the whole system, if you will, when you get on the balcony. This can expand your perspective, your capacity for thoughtful action.

Jennifer Hughes ([00:16:22](#)):

And then when you're on the balcony, one thing that I caution you about is, don't judge what you see. So remember, judgment is about reacting to what's happening. Maybe you have some blame or resistance or disappointment or anger or resentment. Just be aware. Get curious. See what's happening. When I say get curious, we ask questions, we try to dig a little bit deeper. We may see the symptoms, but we are really trying to find what the real problem is. So this is one of the ways and something that I think is important in shifting from that doer to leader, is being able to get up a little bit higher to see what's happening.

Jennifer Hughes ([00:17:08](#)):

So, some questions for you on this. This is our next. Again, we're really intimate one on one here. It's just like I'm asking you questions and you're answering them. So taking again a couple of minutes to do some reflection time here. I want you to answer these questions. How much time do you spend on the dance floor? What might keep you on that dance floor? So keeping you down there with everybody else. And maybe what do you need to change with the way that you're leading other people so that you're spending more time on the balcony versus on the dance floor? So again, I'm going to give you two minutes to answer these questions. I know that doesn't feel like it's much time, but again, if you don't get them all, you can always come back and answer these. So again, two minutes. Maybe about one more minute. About 10 more seconds to wrap up your thought.

Jennifer Hughes ([00:20:09](#)):

Again, I like to reiterate that getting on the balcony or becoming a leader doesn't mean we're not doing. We still have to be in the dance floor, balcony. If we want to keep that concept going, we still have to be on the dance floor. I think if we forget what's happening down there, we're probably not serving as well when we're able to get up to the balcony and look out. And then we have to think about, if we have to get on the balcony, what's the balcony that our own leadership is getting on? Maybe sometimes we need to get up there with them to see even a broader perspective. So the idea with getting on the balcony is just how do you get yourself sometimes out of the only seeing what's directly in front of me to get up a level to say, what might I be missing? What might I not be seeing if I stay on the dance floor right now? But knowing that probably you're going to be going back and forth. Becoming a leader doesn't mean that you're not on the dance floor. Just one way to do that.

Jennifer Hughes ([00:21:10](#)):

There are some specific things that you can look at in regards to doing versus leading. Again, time for all of this, right? Doers are going to have all the answers. Leaders are going to get more curious. I keep, you're going to hear me use the word get curious, get curious. That doesn't mean that a doer should not be curious. We want you to be curious as well. When you're really in that doing, you're putting out others' fires. You want to equip others as a leader to put out those fires. So you're not coming in with your nice cape on to save the day. You're also offering that opportunity to others.

Jennifer Hughes ([00:21:48](#)):

And then you guys can read some of these. I think what I really liked about one of these is, we create to-do lists. And I love the idea of, once you getting into a position of leadership, how do you create to lead this? How do you help others become leaders? Again, doers are staying on the dance floor. It's not that you're not on the dance floor as a leader, but spending time on that balcony and getting to know what's happening in that bigger perspective.

Jennifer Hughes ([00:22:19](#)):

All right, going to keep us going. We're going to move transition now to this interesting thing of, okay, we're in a leadership position. Oftentimes, we are now leading former peers and that feels a little, my technical term for this is icky sometimes. How do we lead former peers more effectively? So the question is, what makes it difficult? One day you're a teammate and then the next day you become the boss. How does that feel? Have you ever been in this situation where maybe that's happened to you, where your colleagues was someone, your partners and then all of a sudden they get promoted? What makes that weird? I think it's just awkward sometimes to go from this feeling of, we used to be comrades, being able to talk about anything to now I'm going to be doing your performance review. That feels a little bit weird. I even say it's awkward. When you look at the word awkward, the word looks weird. So just keeping that in mind, that this is uncomfortable.

Jennifer Hughes ([00:23:25](#)):

I want to get us into your own feelings around this difficulty around leading former peers. So again, taking a minute or two to reflect here. We're actually going to make this one a little bit shorter, but what for you is difficult about leading former peers? And again, I'm going to give you about a minute on this one. So what is, for you, difficult about leading former peers?

Jennifer Hughes ([00:24:43](#)):

We'll take about 10 more seconds. I'm trying not to read the chat because there's just too much, but I'm seeing a lot around boundaries, and it's plugged for another session that's going to be coming up around setting those boundaries and how you might do that. So yeah, I am in agreement. Boundaries are really important when you're talking about this. I'm seeing a lot about respect as well. And I think this is again where I'll use the word curious, is how are we contributing to that potentially in this new role? So really thinking and being more self-aware of what we can do, how we are showing up that may be contributing to that awkwardness, that feeling of lack of respect, things like that. So great things coming into chat.

Jennifer Hughes ([00:25:51](#)):

So this is what it might feel like. One day your buds, you're working together, and now all of a sudden you have position of power and you just don't even feel like you're in the same place. So things to keep in mind with that. Another opportunity for you to do a little reflection here. So what I want you to think about is trust. And when you think of someone that you explicitly trust, what are the traits that make you trust them? Okay, I want you to, again, do your own personal reflection. And then think about what is one thing that someone could do that would absolutely break that trust with you. So again, personal reflection. We're going to take a couple of minutes to do this. So two minutes, go ahead and jot down your thoughts.

Jennifer Hughes ([00:28:43](#)):

Take another minute. I'll give you about 10 more seconds to wrap up your thoughts on that. Seeing a lot of good stuff in the chat. This isn't a question that's in there, but as you think about those traits and what makes you trust someone, think about the people you're now leading, how does that impact either how you lead or how you view them based on just those traits alone. We're going to dig into trust a little bit more.

Jennifer Hughes ([00:29:29](#)):

So this may be something you've heard about before or seen, it's called the Trust Equation. If you haven't, I'm going to introduce it and we're going to go into a little bit of detail around this because I like to explain each one of these. But this is something that was created for, there's a book called The Trusted Advisor. This equation was created there, of how we can potentially increase trust or at least the components to look at. There are lots of trust components that are out there. There's many books written about trust. This just happens to be one of them. It's one that I use regularly. So please know this is not the one and only way of looking at trust. It's just one we'll look at today. Maybe we'll give you a little, I use the word nugget, give you a little nugget about what might be happening with you and either someone you're leading that's a former peer or something that could be happening in that trust piece.

Jennifer Hughes ([00:30:28](#)):

We're talking about leading former peers and what needs to change a little bit is how do we create this new level of trust with them. So that's why we're wrapping in this Trust Equation. So the first thing with the Trust Equation, the T here, is trustworthiness. So trustworthiness equals C plus R plus I all divided by S. And if we think back to our math days, and I'm sorry if I'm making you think too hard because then this one really does a number on my brain, S is really a key component with this because the higher S is, it doesn't matter what happens above it, the lower that trust is going to be. So we're going to dig into each one of these pieces of the Trust Equation.

Jennifer Hughes ([00:31:12](#)):

So the first one, C is credibility. Credibility, it means different things to different people, but at the end of the day, it means I think you have the capabilities to do maybe as I'm asking you or to work in the position that you've been hired in. You are credible. For some people this could equate to education. Being a medical doctor is really important when you're in the field of taking care of other people. That is an important piece of being credible, but it's not the only piece. You could also use data around how that particular doctor has worked with their patients and what their patients are saying. So that could be credibility. So again, credibility is just one piece of the trust equation.

Jennifer Hughes ([00:32:03](#)):

The next one here is reliability. Reliability can be summed up with the, if you say you're going to do it, you follow through and you do it. That's reliability. Now I'd like to add a little bit more on this particular reliability piece. This will make sense as we go a little further as well. It's also when I tell you I can do something and then I find out that I'm not actually able to do that, I come to you as soon as possible and let you know that I can't do it.

Jennifer Hughes ([00:32:38](#)):

So reliability is not about being able to meet a hundred percent of my commitments. It's about being able to manage a hundred percent of my commitments. When I say manage them, that means the minute I find out I'm not able to do something, maybe I don't have access in the system to do it. Maybe I don't have the time, whatever it might be, that I am coming back to you as early as possible, not the day that I said I would do it. And I'm telling you, I know I promised you this, I'm unable to do that. What can we renegotiate here? That's reliability.

Jennifer Hughes ([00:33:15](#)):

The next one here is intimacy. Intimacy, when it comes to trust, is really about psychological safety. Do I feel like I can be in conversation with you and it remains between the two of us, that I can share both my successes and my failures and feel like you are going to accept me? Do I feel like I could tell you a secret and you would keep it? Do I feel like you would be honest with me even if it was hard for you to be honest with me? That is what creates that intimacy piece. Again, I use the word psychological safety in lieu of intimacy just as a way to kind of nail this one home a little bit. So again, if you have high credibility, high reliability and high intimacy, you're doing a really good job of being trustworthy.

Jennifer Hughes ([00:34:11](#)):

The next question is whether your S is high. S here is self-orientation. If your self-orientation is high, and I want to talk about self-orientation so give me just a second, if that is high, it doesn't matter how credible, reliable or how much psychological safety you create, you will decrease your trustworthiness. So let's talk a little bit about what is self-orientation. I like to kind of reframe it a little bit to say, it's about focus. Where is your focus, other-focused or self-focused? It doesn't mean that it is narcissistic. I want to be very clear, we all have a self-orientation. I can tell you, when I do workshops, I will often have to, and especially if I'm going to do... I'll actually rephrase that. If I'm going to do a facilitated session where my role is to come into a leadership team and honestly disrupt it a little bit because they're having some problems, if I come in with a high self-orientation, I may want to be liked by the group. That doesn't seem so wrong. Everybody wants to be liked.

Jennifer Hughes ([00:35:26](#)):

However, if that self orientation is so high that I need to be liked more than I am willing to push this team hard, maybe dig into some uncomfortable areas, then I'm actually doing a disservice to the group and I have a high self-orientation, and it's impacting my work. So self-orientation, it's not like this, "Oh, you're a narcissist." It's not about that. It's that, we all have high self-orientation at times. It's a matter of whether we recognize it. The key is being able to recognize it. Am I not giving you feedback because it's uncomfortable for me? Guess what? That's high self-orientation. I'm not willing to give you the feedback because it makes me feel uncomfortable, or I'm afraid that you're going to get mad. That's a high self-orientation. So keep thinking about that.

Jennifer Hughes ([00:36:21](#)):

I think I just did see one thing around intimacy. I phrased that as psychological safety. So for somebody who might have missed that a little bit. Again, with self-orientation, just to go back to that, if I am looked at as climbing the ladder, so I'm all in it for me, that's a high self-orientation. Okay? So again, trustworthiness is when you are credible, you're reliable, you create psychological safety, meaning people feel like they can come to you, that you have their best interest in mind, things like that. If you have all of those things and you have a low self-orientation, meaning you're able to be other-centered, other-centered, then you have the likelihood of creating very high trust with others.

Jennifer Hughes ([00:37:16](#)):

So, keep us going here. So when you are in a leadership role where now you're potentially managing peers, you have your peers in this group, but even if it's just a new team, then how you build and maintain that trust, it is going to vary depending on the team member. Okay? So it's not a one-size-fits-all approach. And I think to effectively kind of manage that transition of the peer-to-peer to the peer-supervisor relationship, you really need to understand who are the players, who are the team members,

what are some of their preferences, what are their strengths, what are their areas for improvement, and what is your area of trust with them. So thinking about the Trust Equation, how well is their trust there?

Jennifer Hughes ([00:38:17](#)):

So one of the things that came up for me in just doing a lot of coaching was realizing that... And I had to create this very complex spreadsheet, as you can tell. That's my sarcasm coming through, by the way. I realized that leaders were not, I'll say, writing down or keeping track of their staff, their team, their colleagues in a way that enabled them to quickly identify who did they need to work on the relationship with versus who did they feel like the relationship was really strong and therefore didn't require the focus that it does. So I have shared this with a lot of people, but just a quick spreadsheet of what you could do with your team members where you list each team member. You can put in their preferences and strengths or styles. These are some of the things like are they extroverted or introverted? Do they like collaborating with others or do they prefer autonomy? Do they like to be praised in public or praised in private? What are some of those types of preferences and styles?

Jennifer Hughes ([00:39:27](#)):

Then looking at their strengths. What is it they're really, really good at? What is it that if I wanted to give them a piece of work and they were going to excel in it, they could use these strengths to excel? Also looking at areas for improvement. Where might they need to focus? Where could they improve a bit more? This is also an opportunity for you say, if I have a project that could be a growth edge for them or a small piece of work where they could push a little bit on what they are used to doing. That's an opportunity to look at their areas for improvement and say, "I think this would be good for that person because it would push them a little bit out of their comfort zone."

Jennifer Hughes ([00:40:05](#)):

The one question that seemed to come up a lot in the coaching was this motivation and not really knowing what motivates employees. And I get it, money is going to come up, everybody's going to know that that's going to come up. There's a lot of data around money not being the only motivational factor and not being a long-term factor when it comes to motivation. So when we're talking about motivators here, we're really looking at what are those intrinsic things that this individual may like, may enjoy that would be motivating for them. And then lastly on the trust piece is looking at that Trust Equation and saying, "How is my trust with this person? Do I feel like I have a high level of trust? Maybe I have a medium level of trust, maybe I have a low level of trust. This gives me a quick hit of where I might need to focus a little bit of my energy with that individual."

Jennifer Hughes ([00:41:01](#)):

And I'm going to show you, I actually used myself as an example here, to put it in so that you can see what that looks like. That's Jennifer H., that's me. I'm an extrovert. I love collaborating. I am not very good at the detail. It doesn't mean I can't do it, just means I'm not always good at it. My strengths are, I'm a big picture thinker. I do a lot of facilitation, have some skills around making people feel comfortable, usually have good communication. Wouldn't say that that's always the case. And areas for improvement, I need help with approach and process. So that's something that I know I'm not very good at. And then I will often work outside of scope. So this is something to look out for if you are leading me, that I may take on little things and realize all of a sudden that a small project turned into a really big one.

Jennifer Hughes ([00:41:56](#)):

Motivators: I love collaborating with other people and learning new things. So when I look at motivators for me, if my boss were to look at this, my boss could say, "Hey, I've got a new project that's really outside of something Jennifer's done in the past. This could be a great motivator for her," or, "I have this opportunity for a collaborative effort with another client or another group. Jennifer would like to collaborate with others." And then that trust level, medium level of trust, meaning that we could work on our trust a bit. If it's not high, then we could work on that just a bit.

Jennifer Hughes ([00:42:35](#)):

So I actually want you to take a stab at this and think about, one thing I will say about the employee landscape is, we are really looking at leadership and team. However, oftentimes in my coaching, I have folks do this not just for their team but for the colleagues that they work with and even for their own leadership. It is not going to hurt you to better take stock of what you believe your boss's preference and some styles are because that's going to help you interact with them better. Okay? So remember that this, calling it the employee landscape, however, you could use this for anyone that you work with.

Jennifer Hughes ([00:43:17](#)):

So we're going to give you a little opportunity to do that. In your workbook, you should have this, but if not, again, you could just jot down someone's name, their preferences and styles, strengths, area for improvement. We're actually going to give you a little bit more time on this one. So I'm going to give you about four minutes because you are writing down a lot more. And then if you want to add a second person, do a second person, if you have time. So again, we're going to take about four minutes for this one.

Jennifer Hughes ([00:46:39](#)):

We have about one more minute. Take about 10 seconds. I really hope that you guys are finding that some of these just little things you could do can really impact the relationships that you're having and how you're leading, and or how you may be moving into that leadership role, or how to address that awkwardness of leading a former peer. I want to just, again, touch base on that Trust Equation. I think I saw a couple things coming through on self-orientation. I think if there's one thing you could ask yourself to see if you have a high self-orientation, is when you are moving forward in a decision or you're going to take action, ask yourself, who does this serve? And if you can only answer, "It serves me," then that is very self-oriented. Now sometimes that may be what you need to do. Again, this isn't about self-orientation is always this horrible thing. We all have it.

Jennifer Hughes ([00:48:48](#)):

If you can say, "I am other-centered that I'm willing to actually forego my own personal needs because what is best for the group is to go in a different direction," you are very other-centered. So again, when thinking about self-orientation, really think about who am I serving, who is this in service to? And that's going to help you in that self-orientation. So great questions coming up, great thoughts around the Trust Equation. I love hearing somebody say, "Have your employee fill out this landscape." I love that. Just get them to think about it and give it to you. I would validate that. Some people may say they have a strength in a certain area and that may not be the full truth of that. So just make sure you're doing that validation.

Jennifer Hughes ([00:49:35](#)):

Going to keep us going. All right, so top 10 things to think about. This is as it comes to leading your former peers, is to just make sure you're leading by example. Make sure you're being the leader that you want to see in your organization. I highly encourage you to have one-on-one meetings with each team member to make sure you're cultivating that relationship, that you're increasing that trust. And sometimes even having the conversation, that could feel weird, but saying, "How do you feel our trust is? Do you feel like we have a high level of trust?" Or even being awkward enough to say, "I don't feel like we have as deep of a level of trust as I would like for us to have and I'd love to engage in conversation about how we can do that."

Jennifer Hughes ([00:50:22](#)):

Set boundaries and renegotiate the relationship. So this goes back to own, and you'll see address awkwardness early in here, is just own, "This is kind of weird for me too. So how do we make it clear based on our new roles that I'm now leading you? How does that look different and how can we make sure we're negotiating in a way that will work for us?" Even going so far as to being, "I'm a total kind of weird person when it comes to this, but hey, I'm Jennifer and I'm your manager now," kind of reintroducing yourself that way. Make sure you're being very clear on expectations that you might have. I think if you can clearly communicate the expectations to individuals, you are setting them up to be more successful in working for you.

Jennifer Hughes ([00:51:07](#)):

Make sure you're communicating, communicating, communicating, and you are listening, listening, listening. I don't just mean listening and waiting to sit back and wait for a response that you can come up with. I mean truly listening, what's the body language telling you? Are they saying one thing and doing another? What does that mean? Where's that disconnect? Make sure you're building relationships with others who may be in your same situation so you can learn from and share with them. Make sure you empower your team. We're going to talk about that in just a minute. And then make sure you're engaging in difficult conversations regularly. Oftentimes, when we do not engage on in those conversations that are difficult, it is because we have a high self-orientation, we're uncomfortable with them. It makes us uncomfortable. That is not doing the other person a service at all when we do that.

Jennifer Hughes ([00:52:05](#)):

All right, going to keep us going. So the next thing is, you've gotten through the awkwardness and now my awkward way would be like, "Hey, Cindy, so I got promoted and now I'm your boss. This is weird, right?" And you can laugh about it and you can address that it is just going to be weird. And I can say, "Cindy, how do we make this work? What is it you need from me to make this work? Because these are the things that I need." That sort of stuff. Now that you've gotten past all of that, how do you get to the point of knowing, "Well, what can I delegate and what do I not delegate?" We like to use the words entrust and empower your team.

Jennifer Hughes ([00:52:40](#)):

I think oftentimes we look at delegation as handing off the things that we don't want to do anymore. And that's not really true. So really looking at what are the things that don't require us to do them. Those are going to be the key for delegation. And I like to say, delegation is about trust. I am trusting you to do this specific task or this specific project. And I think that can be really empowering to folks. So I like to at least start us, "I'm trusting you to do this."

Jennifer Hughes ([00:53:15](#)):

All right, going to keep us going. Really thinking about that there is no such thing as time management. You are not able to manage time. I am not able to manage time. And I know we hear all of these things about time management and how do we better manage times. This goes back to what I said earlier about commitment management. You cannot manage time, which indicates that I could make 30 minutes to an hour, which if I could do that, I would probably not be in the position I'm in. I can't do that, but what I can do is manage any commitment that I made to you. Whether that means going back on the commitment, which means I'm talking to you about it, or following through, or saying, "I actually thought I could do this and I can't do it because I don't have the skill or I don't have the access."

Jennifer Hughes ([00:54:06](#)):

So the question is, what commitments are you making? So just like we have this tendency just to fill space, we also fill our calendars, and it's not going to be long until your whole work calendar is just consumed, if it's not already. This is what happens. At some point, maybe now, you're going to have some unreasonable constraints on your time. So again, thinking about your priorities may shift as you move into different roles in the organization. So you've got to be strategic in how you're thinking about your commitments, your time, and your priorities. So you have to be intentional here about how you manage those commitments.

Jennifer Hughes ([00:54:46](#)):

We are going to actually figure out what commitments you're making. So in order to do this, you have to know what is on your plate, and we're going to do a little activity. In three minutes, I want you just to do a brain dump of all the things you currently have on your plate. I want this to be personal and professional, hobby-oriented, whatever it might be. These could be meetings that you have, projects that you're doing. Maybe it's emails, maybe you have strategic planning. You have monthly reports. Maybe there's a hobby you have. You have a kid event, a date with your significant other. Whatever it might be, I want you to just do the laundry list of all of these things that you have. Commitments are not things that you have explicitly said, "I'm going to do this." They are also all the things that are just expected of you. Okay?

Jennifer Hughes ([00:55:38](#)):

So again, take three minutes. I want you to write these commitments down. Again, I know there's been a little bit of workbook difficulties, so just get a piece of paper and a pen. Three minutes. I also want to be clear, I am not expecting that this will be a complete list of all the things. I think that would probably take a lot longer. However, get a laundry list of them as best you can.

Jennifer Hughes ([00:57:56](#)):

We have about one minute. About 10 seconds. I see lots of A, "I will apologize for stressing you out." B, "I understand we probably all need multiple plates." C, "I promise I'm going somewhere with this so hang tight with me." And D, "I think it's good to get a handle on all of the things we actually have committed to because most of the time they don't get written down." They're not even in our awareness, we're just kind of going through the motions. So I like to say that if we don't know what we're committing to and we are saying yes to all of these things, what are we saying no to? If I say yes to all these commitments, what am I saying no to? And let me tell you, you are saying no to something even if you're not actually saying no to it. Oftentimes, what I'm saying no to impacts me personally, just going to own it.

Jennifer Hughes ([01:00:07](#)):

When I put so much stuff on my plate that is work related and I keep saying, "Yes, I can do that and I can do that," I am saying no to my kids possibly, I'm saying no to my spouse. I may be saying no to something at work that could be really important and I just didn't realize it. So I think it's important for us to understand what we actually have going on. So hang with me, sorry if I'm stressing you out, we're going to keep going.

Jennifer Hughes ([01:00:39](#)):

If you haven't heard of the Eisenhower Matrix, I'll introduce it. If you have heard of it, then you know it's this quadrant of urgent, important; not urgent, important; urgent, not important; not urgent, not important. We're going to go through this a little bit more. It was named after Dwight D. Eisenhower, served as the 34th president of the United States. It was made more popular by Stephen Covey in his book *The 7 Habits of Highly Effective People*. The clear piece of this is where we spend most of our time, which is in that urgent and important. However, we often get consumed by the urgent and not important, largely because we fail to recognize what is really, really important. Okay? So this is where we're going with this. So I'm going to give you a second here.

Jennifer Hughes ([01:01:31](#)):

So where do you think you spend most of your time and where do you think you should spend more of your time? So again, we spend most of our time in that urgent, important, but what we don't realize is how much time we're actually spending in not urgent, not important, and where we should be spending our time. Where we should be spending our time and especially in leadership roles is in the not urgent but important. So that's where we really want to be spending that strategic planning, things like that. So again, if we think about where these things might go, social media, definitely going into that not urgent, not important. I like to make it clear that I'm not saying don't do social media. I'm not saying that. What I'm saying is that that is not urgent and not important. So be aware, how much time are you spending there? Just be aware. That's all I'm saying. Project deadlines, that's going to go into that urgent, important piece. Okay?

Jennifer Hughes ([01:02:27](#)):

Strategic planning, that's going to go into our not urgent but highly important. If we're not doing that strategic planning, do we really know what urgent important is? If we aren't looking at strategy, how are we going to know that? And then email response. Notice I put most here. I am not, again, indicating that email responses are not important. But in this new, and I guess that's not as new now, but in the digital age, email has just become our main way of communicating. When an email comes across, it stirs up this importance piece to us. Right? "Oh, I've got to answer. It's urgent and important, I must answer it." And then the question is, how many times can you step back and say, "Who else is on this email that could potentially answer it"? So a lot of our email response, if we were to truly take a step back and look at it, falls into the urgent. It feels really like we got to answer it immediately, but it's not necessarily important, meaning it may not need us to answer it. Okay?

Jennifer Hughes ([01:03:32](#)):

So what I want you to do is to take a look at the list that made some of you really uncomfortable. We'll probably give poor markings on this particular webinar because I stressed you out. Take that list, look at it, and I want you to review it. I want you to see if you can find one commitment that could go into each quadrant. So I want you to look at the list, and can you find one commitment that goes into urgent and

important, truly goes into urgent and important; one that goes into, it's not urgent but it's highly important; one that goes into, it's urgent, it's not important. And then my caveat here is, that's the one I want you to look at and say, "It might be important, but it's not important that I, Jennifer, is the one who does it." So that means it can be not important for me.

Jennifer Hughes ([01:04:28](#)):

And then lastly, one that can go into not urgent and not important. I'm going to give you probably three minutes to try and do this one. See how far you can get if you can find one in each one. And then eventually, if you could put all of yours into your list of commitments into one of these quadrants, I think what we'll go through next could really help you in determining where you might be able to delegate. Okay? So again, let's take three minutes to do this.

Jennifer Hughes ([01:07:14](#)):

So I'm seeing some great questions come through about figuring out what's important, what's urgent? How do I know? Is it just me? Is it something? And this is where it's a great opportunity to try to get on the balcony. What in this bigger perspective am I placing more importance on it than is actually true, the full truth? Is it a deadline just because it's a deadline? Or is it a true like if we don't get this, it's going to impact much greater things here? The urgent and not important, I like to caveat this, in thinking about it, it may come up as urgent and important. And then ask yourself the question, "Does it have to be done by me? Am I the only one who can do it?" And if you can say, "No, there's plenty of people who can do it," then it may fall in the non-important. That means, "I can try to get somebody else to do it," and we're going to get there with the next slide. Okay, take about 15 more seconds.

Jennifer Hughes ([01:08:38](#)):

The last thing I'll add on this is, if you are struggling with determining importance, urgency, don't feel like you have to be by yourself doing this. This is where having that peer network that maybe you can bounce things off, of maybe asking your leadership, "I'm struggling with this, give me the priority list. Which one of these is more important than the other? Well, help me figure out order of importance. It may still all feel very important, but maybe that gets me to the not urgent. So it's still important, but maybe I can push it off a little bit." So don't feel like this is a lone game. You can engage with other people when you're struggling on these. Okay?

Jennifer Hughes ([01:09:21](#)):

All right, I'm going to keep us going because I think what's really important is getting to, "Well, what do I do with this now that I know where things fall? I still have to get them done." And that's where I say, maybe you should ask yourself that question. So when things fall into your urgent and important, those are the things that you're going to do. And whether you do it now, or maybe there's a specific deadline, but that's the stuff that's got to get on your plate to get done. Not urgent but important is, decide when to do it. It's going to get done. It needs to eventually move to that do, but you can schedule this. These are the things that can be scheduled. If it falls into your urgent and not important, and the reason I gave you that caveat is, does it mean it has to happen by me? Am I the only one here who can do it? If not, then it can fall into the not important for you, meaning you can delegate it. Find someone who might be able to do this for you.

Jennifer Hughes ([01:10:17](#)):

I know I'm using language that sounds like it's really easy. For some of us, it's going to be like, "I don't have anyone I can delegate it to." And those need to be further conversations. We're definitely not going to solve that in a 90-minute webinar. But it's something for you to look at to say, "Well, maybe I can engage a little differently with this particular activity." And then of course, if it's not urgent, not important, think about ditching it. This relates to four valid responses we have when someone asks us to do something. When we're making a commitment, we have four valid responses. We have yes, and that correlates to that urgent important, "Yep, I can do that for you." We have no, which is, "I can't do it. Maybe I don't have access. Maybe it's not in the priority." And I get that we're probably not just going to say, "No, I'm not going to do it." Provide your context. See how you work through that.

Jennifer Hughes ([01:11:06](#)):

Commit to commit, this looks like, "I can't do that by the date you've provided me. However, I can do it and this is when I can do it by. I'm going to schedule it and make sure it happens." Okay? That's what that commit to commit. It could also look like, "I can do this. I'm not sure when. So let me get back to you and let you know what will work." That's also a committing to commit. And then counter offer, this is, "You asked me to do this," and I keep using Cindy as my example here, "but I think Cindy also has access to do this. So if it's all right with you, I think let's work with Cindy and see if that's something she can take on." That's what it looks like. If I'm leading people, this could look like, "Let me ask my team. I think I have someone on the team who can do this in lieu of me. I need to gather what's on their plate first and see if that's something we can do by the timeframe. And I can delegate that."

Jennifer Hughes ([01:12:02](#)):

So again, if you're living in this perpetual urgent kind of response place, then you're not going to last. We're going to burn out. This is what happens. If you are an athlete or a former athlete, if you know have done any athletics or training, I just want you to think about what would happen if you trained nonstop with no recovery. Yes, you train hard. It's not the training though that gets you stronger. It is in that recovery. You have got to recover. Both of those things are important. So if you push yourself to the point where you can manage your stress, you'll get stronger when you rest, but you got to figure out when that can happen. So this applies to work. This absolutely applies to work. Burnout is real.

Jennifer Hughes ([01:12:57](#)):

I have a colleague who often says I'm a recovering people pleaser. That's what his phrase is. I'm a recovering yes person, where I would say yes to almost everything that was asked of me, because I took that as demonstrating my abilities and capabilities. I was, excuse me, not considering this impact that it was having to myself, to my family, and in all honesty to the work. I was impacting the work I was doing. When I started noticing I was saying yes to everything, I was trying to say no to things. Most of the times. I was saying no to things in my personal life. That is going to create problems, right? I'm not saying that we are going to say yes to everything in our personal life either, but if I am saying yes to everything, I am definitely saying no to something. My actions will speak that.

Jennifer Hughes ([01:14:03](#)):

Now, you fast forward, I block time off on my calendar to think strategically. I block time off on my calendar each year to think about what are my annual aspirations for the year. All of these things would fall in that urgent or not urgent but very important pieces of work that I need to do. I certainly have not perfected this at all, but I'm doing a lot better than what I did when I was saying yes to everything that was thrown at me. Okay?

Jennifer Hughes ([01:14:38](#)):

So again, use the Eisenhower Matrix as a way to look at what I'm saying yes to, and does it really require me to be the one to do it? And if it doesn't, then how might I delegate that? So the whole purpose of this was not really to overwhelm you, sorry about that, but to really look at what you could potentially delegate to others if you're in a position where you can do that. And if not, what you might be working on and to really take that balcony look, what am I doing every day that maybe I'm just doing it because I've always done it, but it doesn't need to be done? We're just doing it because that's what we've always done. That's an opportunity for you to ask questions. Get curious. Work with others to determine if you can make some changes there.

Jennifer Hughes ([01:15:24](#)):

So this was about delegation. I do want you to take a minute and think about what is one thing you might do different to better or more confidently delegate to others. So I'll give you just a couple of minutes on this.

Jennifer Hughes ([01:16:44](#)):

Take about 30 more seconds. I just want to take a moment to say thank you. This is definitely a different way of interacting. There's so many people on this call. It's amazing to see so many comments come in, and I know we weren't able to cover every single thing and there's likely questions out there. Cindy, I will officially turn it over to you. If there's anything that came up that you feel like we could answer or attempt to answer, I'll be very honest if I don't feel like I can answer it, then I'm happy to do that. If not, I will keep us going through your slides.

Cindy ([01:18:03](#)):

Jennifer, thank you. If you can move us forward one. I love seeing all of the reactions come in. So thank you for your time. I'm assuming that this was powerful and meaningful to the group based on what I see on the screen right now. I see a question about boundaries. We do have a session coming up on creating and developing boundaries October 12th. So if you have not registered for that yet, the link is on the screen and in your workbook. Just to cover a couple of things for you that have kind of come up throughout the chat today, that link will take you to the workbook and the recordings. So continue to utilize that for the remainder of the sessions.

Cindy ([01:18:46](#)):

Some folks were having some issues with a blurry screen. I'm not sure why that is. It could be what you're viewing it on or the size that you're looking at it on. But your workbook mirrors the slides so you can follow right along in that workbook if you're having trouble with that. We will be sending out the workbook and a reminder about 48 hours before the next session for you, so you'll get the workbook ahead of time.

Cindy ([01:19:13](#)):

So with that, I want to say thank you to all of you who stayed with us today and taking some time out of your day. It was obvious that this was a little bit stressful to think about all the things you had on your plate, and you took 90 minutes to be with us. So I hope that that was a valuable use of your time. We appreciate you and everything you do every day for your patience and your health center and your teams and your staff. A thank-you to Jennifer for being with us, she will be back again next week, and to

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Olivia for supporting us throughout the day. So go on, have a good afternoon, and we look forward to seeing you next week. When this closes, you'll be taken to an evaluation. Like Olivia said, your feedback is important to us so we know how to better serve you going forward. Thank you and have a good afternoon, everybody.