

## Virtual Team Development Companion



**For Demo Surveys December from Better Inc**

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**Better Inc.**

Technology Improving the World

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# What is 'REACH'?

REACH provides insights to people's personality traits and their agility. Through this report the reader will understand the needs of their team members, with a particular focus on leading and managing as leader of a virtual team.

## What is this REACH Virtual Team Companion?

This companion uses the psychometric and agility aspects of REACH to provide leaders of virtual teams with insights on how to lead and manage their virtual teams more effectively and purposefully.

The report has 5 areas of focus:

1. **Leading Our Profiles as a Virtual Team**  
Leading our Personality Styles as a Virtual Team, helping leaders to think about the varied needs of our team members when working virtually.
2. **Facilitating Collaboration**  
Insights, tools and guidelines to lead and develop your team members, being aware of how to engage, encourage and moderate your team members.
3. **Building the Team Agility and leveraging the Strengths of your People**  
Understanding how to make the most of your team so you can have a happy and high-performing team.
4. **Developing Your Team**  
Taking your team to the next level comes from building the agility of your team to adapt to different people, tasks and situations – which is measured as REACH. This final section helps you understand how to build their REACH.
5. **Appendices with Resources to provide every team member and Personal Training Plans**  
Useful resources to help every team member develop their awareness of self and each other so they can collaborate more effectively and work to each other's strengths

Managing virtual teams requires the fundamentals of an in-person team – trust, respect, embracing and leveraging strengths/diversity together with clarity of role, purpose and communication.

This report is designed to help leaders of virtual teams develop awareness and adopt best practice when managing virtual, remote and hybrid teams.

Additionally, using clarity provided in this companion, leaders can facilitate discussion, develop team culture and craft your communication more purposefully to have a high-performing team.

The golden rule with managing virtual teams:

# “Double the Huddle”

More constant communication is important for everyone – because the incidental chat that happens in a shared physical space can't exist.

# Virtual Team Overview

The section below provides an overview of your team member’s personality styles.

## Counselor Profile

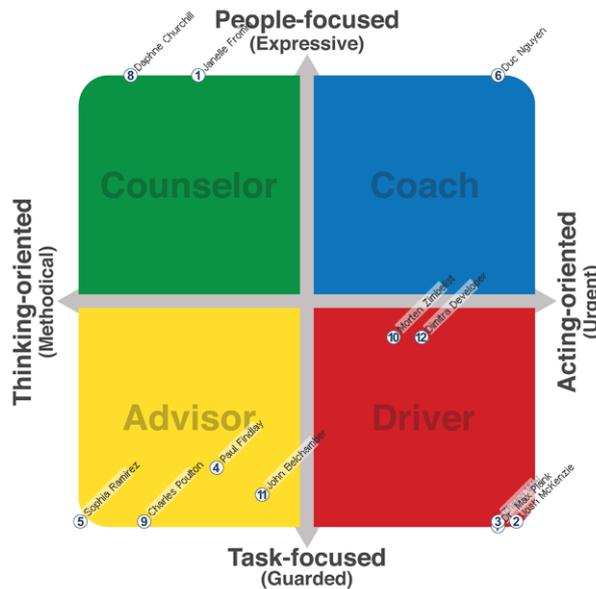
Counselors are best recognized for being: Thinking-oriented and People-focused. The key ‘markers’ or behaviours of the Counselor Profile include:

- **Focus** on nurturing others
- **Communicating** with a warm, comforting style
- **Conflict-handling** by accommodating others’ views
- **Delegating** by ‘asking’ others for participation
- **Planning** through a careful, flexible approach
- **Recognition** that is personal, private
- **Learning** with careful, step-by-step reflection

## Coach Profile

Coaches are best recognized for being: Acting-oriented and People-focused. The key ‘markers’ or behaviours of the Coach Profile include:

- **Focus** on networking
- **Communicating** with charisma, dynamic style
- **Conflict-handling** by collaborating on solutions
- **Delegating** by ‘selling’ others on participation
- **Planning** through a fluid, interactive approach
- **Recognition** that is team incentive
- **Learning** with active, ‘big picture’ understanding



## Advisor Profile

Advisors are best recognized for being: Thinking-oriented and Task-focused. The key ‘markers’ or behaviours of the Advisor Profile include:

- **Focus** on knowledge and understanding
- **Communicating** with a reserved, formal style
- **Conflict-handling** by identifying compromises
- **Delegating** by ‘teaching’ the suggested approach
- **Planning** through methodical, detailed preparation
- **Recognition** that is private, objective
- **Learning** with careful, step-by-step reflection

## Driver Profile

Drivers are best recognized for being: Acting-oriented and Task-focused. The key ‘markers’ or behaviours of the Driver Profile include:

- **Focus** on accomplishing
- **Communicating** with a focused, intense style
- **Conflict-handling** by directly confronting the issue
- **Delegating** by ‘directing’ the course of action
- **Planning** through an urgent, adaptive approach
- **Recognition** that is individual incentive, competitive
- **Learning** with active, ‘big picture’ understanding

The Profiles of the 12 people selected are:

- 17% most commonly display Counselor traits, which are most commonly inclined to be detail-oriented, methodical and people-oriented.
- 8% most commonly display Coach traits, which are most commonly inclined to be big picture, urgent and people-oriented.
- 42% most commonly display Driver traits, which are most commonly inclined to be big picture, urgent and outcome-oriented.
- 33% most commonly display Advisor traits, which are most commonly inclined towards details, processes and tasks.

# Part 1: Leading Our Profiles Working from Home

This section encourages leaders to think about the individual needs of their team members based on their personality type and being mindful of their different home circumstances.



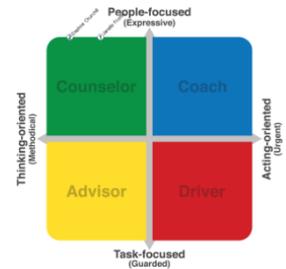
**Please note: The next section works through each profile type. Even if there are no team members from a particular style on the team, this section will help you think about how leadership and resourcing may change if/when you add a certain profile to your team.**

# Supporting the Team Working Remotely

## Counselors Working Remotely - 17% Of Our Team

### Engaging Counselors:

- **Focus:** Find opportunities for Counselors to **nurture**. Could they be in a virtual mentoring or buddy arrangement? Are there any specific skills or experiences that your Counselor team members could cross train someone?
- **Recognition:** Counselors generally thrive on your personal messages and video chats instead of acknowledgement in a group chat or cc' email.
- **Engaging:** Counselors have a people lens. When they are working on something, help them understand who this affects and who else is contributing. Facilitate them engaging and collaborate with the other stakeholders.
- Take the time to learn about Counselors – learn about who they are, what's important to them and show an interest in how they are feeling. Be sure they know they are more to you than just a 'task executor'.
- Write or video chat Counselors whenever you can it's important for everyone, probably more important for Counselors than some of the other profiles.
- **Learning:** If you need to teach Counselors something, a 30-second screenshare may not suit. As reflective methodical learners they may prefer to be given all the steps and have the opportunity to reflect and ask questions.



### Managing Counselors:

- **Communication:** Counselors generally like warmth. Can you have a video chat more often than text chat?  
As their leader, if you're challenged or stressed one day, maybe sending a message without much tone rather than an abrupt video call that day would be best.
- **Conflict:** Video chatting and asking how Counselors feel about specific things may be the only opportunity to realise I am challenged. The facilitation tips later in this companion can help facilitate effectively and draw their feelings and opinions out.

### Ideal Environment:

- If Counselors remote/home office is around other people, they may be more easily distracted than other profiles.
- How can you help Counsellors focus? For example, noise-cancelling headphones or hours that work around my home environment patterns may help me focus.
- Be sure to ask for a photo of their workstation, it's important to check their ergonomics.

### Delegating Tasks:

- Asking Counselors to take on tasks will be most effective when you provide details, process, be clear about who it affects, and give them an opportunity to think through the requests and processes and come back with questions for clarification.
- When working from home, assigning tasks that work to people's strengths can be even more important, so people are less likely to procrastinate, and more likely to be enjoying their more autonomous role. If you can choose which tasks to give to a Counselor, they are likely to enjoy those that involve both people and detailed work.

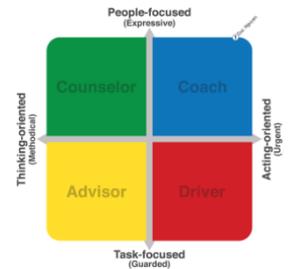
### Meetings:

- Counselors like details and planning, can you provide them with detailed agendas and/or pre-reading?
- Counselors may get focussed on details and long stories in meetings, as their leader be ready to coach them in private about the importance of keeping meetings tight and on point, especially when things are busy.

## Coaches Working Remotely - 8% Of Our Team.

### Engaging Coaches:

- **Focus:** Find opportunities to give Coaches the chance to **network** and feel connected to a social group.  
For example, connect in a team video chats regularly, or let Coaches connect our team and other teams?
- **Recognition:** Coaches are engaged by team targets, success and rewards.  
Are there ways our team can strive for a common goal and celebrate success as a team? If you can provide a live scoreboard or tracker that will help create engagement, if not, a quick message in a chat thread on daily or weekly progress would help.
- **Engaging:** Coaches have a strong people orientation with a big picture view. So be sure to share with them how people are affected and how things fit together from a bigger picture perspective
- Coaches usually like a fast pace and know “what’s next”. Can you help them feel like there is momentum and some urgency?
- Be sure to check in on a deeper level with coaches frequently. It’s important to do this with all profiles, especially in a virtual team environment, however a failure to do so constantly will be more of an absence for Coaches and Counselors than the other profiles in most circumstances.
- Video chat with Coaches as much as you can, by purposeful about being present.
- Is there an opportunity for Coaches to lead virtual **team building**? Some teams have been doing ‘Zoom Drinks’ on Friday afternoons; initiatives like that would be great for Coaches to lead?
- **Learning:** When teaching Coaches generally keep things focused on the purpose and the outcome and high level rather than bog them down in details.



### Managing Coaches:

- **Communication:** Coaches often like to keep things light and fun. Be an authentic leader, however Coaches will often engage with a fun and buoyant tone – even in text, or at the start of a video call, see if you can give them that lift. Be sure to allow them to express themselves.
- **Conflict:** Coaches tend to help find a solution that works for everyone; when conflict happens, involving the Coach in a collaborative outcome oriented catch up may be an opportunity to bring their strengths.

### Ideal Environment:

- If Coaches remote/home office is around other people, they may be more easily distracted than some other profiles. However, they like to work at a fast pace, so keep them engaged with a good tempo of people-oriented work.
- Are ways you can help cater for your Coaches when they are working from remotely? Can any tasks be done in alternate hours to their family routines?
- Also, be sure to ask for a photo of their workstation, it’s important to check their ergonomics.

### Delegating Tasks:

- Coaches benefit from understanding the big picture and how things affect people – you’ll get better engagement if you provide that context.
- For example, are there people contact tasks that you can delegate to them?
- Can you help me understand why this is needed or important and who it affects?
- Coaches like to know ‘what next’ so where you can let them know there is more to come.

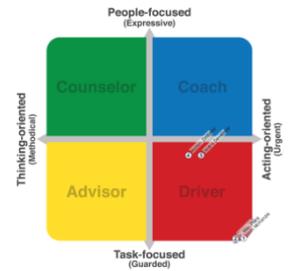
### Meetings:

- Coaches may not get around to reading the agenda unless they know it is important to you. If you need pre-reading to be done for a meeting, be sure to draw their attention to how much it will mean to you if they can make time.
- Coaches can be a strong voice in meetings. Be ready to guide them in private about the importance of keeping meetings tight and on point or giving other people an opportunity to share.

## Drivers Working Remotely - 42% Of Our Team

### Engaging Drivers:

- **Focus:** Find opportunities for me to really “go for it!”. If I get buried in detail or things feel slow, I can lose engagement quickly.
- **Recognition:** Allow for their need to compete and celebrate wins. If Drivers can see how they are tracking compared to others or against a deadline they will often maintain engagement.
- **Engaging:** If Drivers have an achievable goal with tangible outcomes they will often push hard.
- Drivers can lose interest in details and processes, be sure to share the goals and outcomes of any initiative. This is especially important in a virtual team – there is no shared vision picked up at the water cooler or that casual lunch break – in virtual teams this only happens when you are clear and purposeful.
- **Learning:** Teaching Drivers tends to get the best outcome when it is delivered fast and stays high level. If there are details, they need to take in, be sure to explain why these details are important to the bigger picture.



### Managing Drivers:

- **Communication:** Drivers have the same needs for human connection and it's even more important to be purposeful about meeting those needs with virtual teams. However, Drivers focus on the 'what' more than the 'who' and can be more at peace focussing on their own objectives more than other profiles. It's important to make sure you meet those needs and help them feel motivated and focussed on things they can achieve.
- **Conflict:** Drivers can tend to be competitive when it comes to conflict, it can be helpful to give drivers some coaching on the big picture to see what win-win might look like to help everyone achieve a common goal.
- If you are going to send someone a direct to the point message, Drivers are more likely to be Ok with that than other profiles.

### Ideal Environment:

- Drivers can be very task driven and will often focus on achieving their goals so while they may be less likely than other profiles to get distracted, they may also get frustrated if their environment is slowing them down.
- Work with your Drivers to plan their work environment and structure to work well for them.
- Also, be sure to ask for a photo of their workstation, it's important to check their ergonomics.

### Delegating Tasks:

- To have your Drivers motivated and contributing to their full potential, try to give them tasks that allow them to be pursuing outcomes.
- Delegating detailed tasks, or tasks that have lot of roadblocks – especially in a virtual environment can be very demotivating for a Driver.

### Meetings:

- Drivers will often feel too busy to get around to pre-reading, so try helping them see that the pre-reading will make meetings achieve more.
- Drivers are often quick to offer an opinion, be prepared to coach them on the importance of giving everyone the chance to contribute so we can make better decisions incorporating different points of view.

## Advisors Working Remotely - 33% Of Our Team

### Engaging Advisors:

- **Focus:** Advisors prefer clear facts, information and clarity on processes, be prepared to provide them the details they need to engage with work and needs quickly.
- **Recognition:** Advisors tend to enjoy recognition of quality and their attention to detail. It is harder in a virtual environment to 'catch someone doing something right' so be mindful to spot opportunities to give the feedback they need.
- Advisors often prefer the feedback in a private setting, so make a call or send them a message that is specific and clear rather than CC'ing the group and celebrating them publicly.
- **Engaging:** Advisors generally like the opportunity to seek clarification and through asking questions as they work through the details. When managing them virtually, it's important to schedule a time for them to do this or they can be left feeling things are incomplete for them to commence.
- Check in on how advisors are feeling, and their state of mind. However advisors are often ok for most dialogue to be fact and process focussed.
- Advisors like to scrutinise and analyse the details. When they are asking about details, it's useful for you realise that most of the time, they are simply getting clear - don't make the mistake of taking it as a challenge or that they are second second-guessing.
- **Learning:** As process oriented, detail oriented reflective learners, effective virtual training with Advisors will be most effective if they have context and pre-reading, and have the opportunity for a follow up to clarify their understanding.
- Advisors often like solving problems, so when there is something that needs a clear methodical approach they may be your best go-to person.



### Managing Advisors:

- **Communication:** When communicating, advisors tends to prefer a formal and objective approach, while it's important they are listened to and feel valued as a person, communication about day to day tasks can usually focus on the task at hand.
- **Conflict:** With conflict, advisors tend to take a compromising approach, in a virtual environment you don't have the opportunity to observe body language or other signals there is an issue. Be sure to make a point of checking in specifically about the work and relationships otherwise you may be unaware there is an issue to be surfaced and resolved.

### Ideal Environment:

- Of all the profiles, Advisors are the ones that are most likely to enjoy working solo. So check in on their home environment to see if it conducive to the work they are trying to do, and work with them to come up with solutions if there are challenges.
- It's important not to take for granted that because they may like to work independently that they don't need human connection and accidentally disregard their needs.

### Delegating Tasks:

- Make the effort to give details and allow for questions when delegating to Advisors.
- Like all of your team, where possible, give advisors work that they enjoy and plays to their strengths, seek to provide process oriented, task oriented and methodical tasks they can work through – which they will often do with a strong attention to detail.
- Also, be sure to ask for a photo of their workstation, it's important to check their ergonomics.

### Meetings:

- Advisors frequently add well considered insights if they have been provided pre-reading or context for discussions and decisions that are needed. Of all their personalities you are giving the Advisors the best opportunity to add value of you let them work through details prior.

## Part 2: Facilitating Collaborative Meetings with Your Virtual Team

For many leaders, facilitating group discussions or training sessions are important parts of their daily role. Below are some tips based on your team members about ways to encourage collaboration and learning.

### Tip 1: Who do I ask to kick off the conversation?

If you are at the early stages of a concept, go to a global learner – A Driver or a Coach on the right side of the grid.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

If this is a conversation toward a wrap-up of a topic, you'll often get new insights from Counselors and Advisors on the left side of the grid.

Counselors: *Janelle Fromm, Daphne Churchill*

Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

### Tip 2: Who do I pick to give a balancing point of view?

Select one or two participants from differing corners of the grid.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

Counselors: *Janelle Fromm, Daphne Churchill*

Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

If this is a new topic, you'll most likely get a better response from the global learners on the right side of the grid.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

If this is further along in the development of a topic, reflective learners have had a chance to absorb, analyse and reflect, so you'll often get a great response from them.

Counselors: *Janelle Fromm, Daphne Churchill*

Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

### **Tip 3: Who do I ask to review a concept after a break or at a follow-up meeting?**

This is often where the reflective learners shine and are more likely to contribute.

Counselors: *Janelle Fromm, Daphne Churchill*

Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

### **Tip 4: Who do I pick to lead discussion or for role plays in training?**

Active learners are more frequently happy to do lead discussion and participate in role plays, and therefore the group may gain more details for the reflective learners to use for analysis and discussion.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

### **Tip 5: Who do I ask for an opinion at the beginning of a discussion or topic?**

Big picture learners are often willing to share an opinion with small amounts of information – they can really help kick a conversation off early in a concept.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

### **Tip 6: Who do I need to monitor for engagement to make sure they get a chance to contribute?**

Reflective thinkers tend to prefer contributing later after they have had time to digest and reflect. Sometimes that means the conversation is hard to break into or time runs out by the time they are ready to add their well-considered perspective. Be sure to actively seek their input.

Counselors: *Janelle Fromm, Daphne Churchill*

Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

### **Tip 7: Who do I need to manage as a facilitator to moderate their contribution and give others a chance?**

Most often, the Drivers and Coaches will have the most to say. Make sure you manage them to moderate their input.

Coaches: *Duc Nguyen*

Drivers: *Josh McKenzie, Zhang Wei, Dr Max Plank, Morten Zimbelist, Dimitra Developer*

Conversely, be sure you solicit input from the Counselors and Advisors, especially once they have had a chance to reflect on the content (people will often be surprised by their insights).

Counselors: *Janelle Fromm, Daphne Churchill*

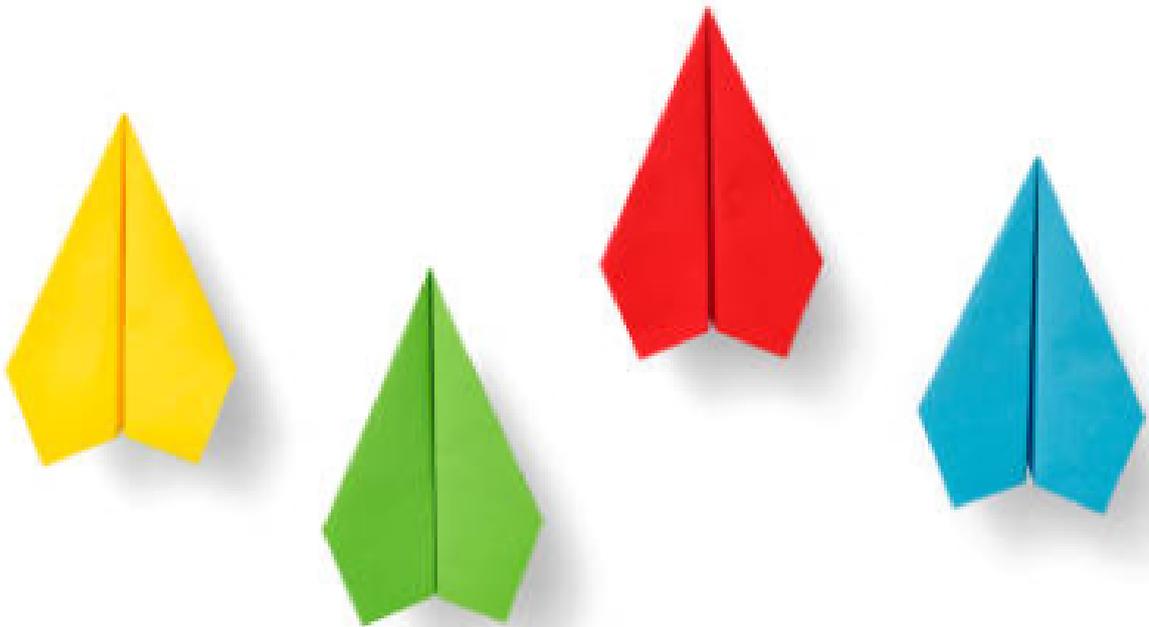
Advisors: *Paul Findlay, Sophia Ramirez, Charles Poulton, John Belchamber*

## Part 3: Building Team Agility

Everything in this report has focussed on what we tend to do most often. The key to improving performance of your existing team is to help people adapt to different needs by switching mindsets and drawing on specific skills.

This is called helping people grow their REACH – which is the agility. People won't change their primary style, and they won't change their position on the continuums much. However, by growing people's REACH, you increase their awareness that a situation or task requires them to adapt AND provide them with the skills to do so.

Below is a summary of your team's current REACH, followed by recommended training that will provide awareness and skills to grow people's REACH (agility) to contribute more in different situations.



# Our Strengths

Relating to Others

Counseling Characteristics	Population Average	Team Average	0	1	2	3	4	5
Assimilating team members	3.81	3.58						
Cultivating team spirit	3.80	3.67						
Identifying personal needs	3.57	3.33						
Recognizing others' efforts	3.87	3.67						
<b>Cluster Average:</b>	<b>3.76</b>	<b>3.56</b>	More Challenging		Moderate		More Comfortable	

Coaching Characteristics	Population Average	Team Average	0	1	2	3	4	5
Building rapport	3.67	4.08						
Easing tensions during conflict	3.53	3.25						
Finding opportunities for synergy	3.55	4.00						
Rallying others around a cause	3.69	3.75						
<b>Cluster Average:</b>	<b>3.61</b>	<b>3.77</b>	More Challenging		Moderate		More Comfortable	

Achieving Goals

Driving Characteristics	Population Average	Team Average	0	1	2	3	4	5
Establishing clear expectations	3.68	4.00						
Evaluating individual performance	3.59	3.67						
Exercising control over processes	3.51	3.67						
Guiding team during change	3.43	3.67						
<b>Cluster Average:</b>	<b>3.55</b>	<b>3.75</b>	More Challenging		Moderate		More Comfortable	

Advising Characteristics	Population Average	Team Average	0	1	2	3	4	5
Addressing quality concerns	3.58	3.67						
Aligning resources with needs	3.48	3.67						
Designing team structure/function	3.50	3.67						
Integrating diverse perspectives	3.58	3.58						
<b>Cluster Average:</b>	<b>3.54</b>	<b>3.65</b>	More Challenging		Moderate		More Comfortable	

## Part 4: Developing Your Virtual Team

### Consolidated courses recommendations

#### **Advanced Skills for Elite PA's and EA's**

- Charles Poulton
- Dr Max Plank
- Janelle Fromm
- John Belchamber
- Josh McKenzie
- Paul Findlay
- Sophia Ramirez
- Zhang Wei

#### **Assertiveness and Self Confidence Training**

- Dr Max Plank
- Janelle Fromm
- John Belchamber
- Josh McKenzie
- Paul Findlay
- Sophia Ramirez

#### **Body Language Training**

- Charles Poulton
- John Belchamber
- Paul Findlay

#### **Business Etiquette Training**

- Charles Poulton
- John Belchamber
- Paul Findlay

#### **Business Writing Essentials for the Modern Workplace**

- Charles Poulton
- Josh McKenzie
- Sophia Ramirez
- Zhang Wei

#### **Business Writing for the Digital Era**

- Charles Poulton
- Dr Max Plank
- Duc Nguyen
- Josh McKenzie
- Morten Zimbelist
- Sophia Ramirez
- Zhang Wei

## Communication Skills Training

- Charles Poulton
- John Belchamber
- Paul Findlay

## Conflict Resolution Training

- Dr Max Plank
- John Belchamber
- Josh McKenzie
- Paul Findlay
- Sophia Ramirez

## Cross Cultural Communication

- Charles Poulton
- Dimitra Developer
- Duc Nguyen
- John Belchamber
- Paul Findlay

## Customer Service Training

- Charles Poulton
- John Belchamber
- Paul Findlay

## Dealing With Difficult People in the Workplace

- Dr Max Plank
- John Belchamber
- Josh McKenzie
- Paul Findlay
- Sophia Ramirez

## Emotional Intelligence (EQ) Training

- Charles Poulton
- John Belchamber
- Paul Findlay

## Foundation Skills for Elite Personal Assistants and Executive Assistants Training Course

- Daphne Churchill
- Janelle Fromm
- Morten Zimbelist

## Leadership Development Training

- Daphne Churchill
- Janelle Fromm
- Morten Zimbelist

## Lean Six Sigma Black Belt Certification Training - Signature Series

- Daphne Churchill
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- Morten Zimbelist

## Lean Six Sigma Green Belt Certification Training - Signature Series

- Daphne Churchill
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- Morten Zimbelist

## Lean Six Sigma Yellow Belt Certification Training Signature Series

- Daphne Churchill
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- Morten Zimbelist

## Manage People and Performance Training

- Daphne Churchill
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- Morten Zimbelist
- Zhang Wei

## PPA - Building Team Synergy

- Charles Poulton
- Dimitra Developer
- Josh McKenzie
- Sophia Ramirez
- Zhang Wei

## PPA - Identifying Difference as Opportunities

- Charles Poulton
- Dimitra Developer
- Josh McKenzie
- Sophia Ramirez
- Zhang Wei

## PPA - Problem Solving with a Growth Mindset

- Dr Max Plank
- Duc Nguyen
- Morten Zimbelist

## Professional Telephone Skills

- Charles Poulton
- John Belchamber
- Paul Findlay

## Retail Sales Training

- Charles Poulton
- John Belchamber
- Paul Findlay

## Sales Training

- Charles Poulton
- John Belchamber
- Paul Findlay

## Supervising Others Training

- Daphne Churchill
- Dimitra Developer
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- John Belchamber
- Josh McKenzie
- Morten Zimbelist
- Paul Findlay
- Sophia Ramirez

## The 10 Dimensions of Effective Leadership

- Charles Poulton
- Daphne Churchill
- Dimitra Developer
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- John Belchamber
- Josh McKenzie
- Morten Zimbelist
- Paul Findlay
- Sophia Ramirez
- Zhang Wei

## Time Management for Managing Projects and Complex Tasks

- Daphne Churchill
- Janelle Fromm
- Morten Zimbelist

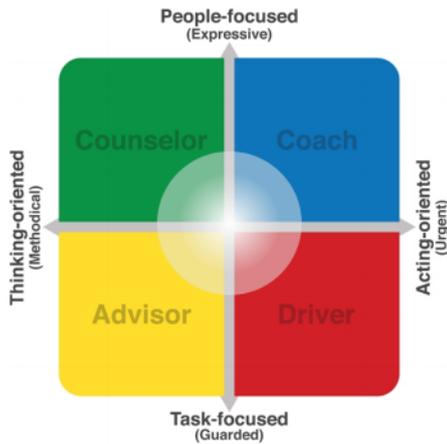
## Time Management for the Modern Individual

- Charles Poulton
- Daphne Churchill
- Janelle Fromm
- Josh McKenzie
- Morten Zimbelist
- Sophia Ramirez
- Zhang Wei

## **Train the Trainer Training**

- Daphne Churchill
- Dr Max Plank
- Duc Nguyen
- Janelle Fromm
- Morten Zimbelist

## Recommendations: Type 2: Trait/Awareness-based RQ Elements



### Developing Awareness of Self and Others – Trait Based Elements of RQ

- [Communication Skills Training](#)
- [Facilitation Skills Training](#)
- [Emotional Intelligence \(EQ\) Training](#)
- [Body Language Training](#)
- [Advanced Facilitation Skills Training](#)

### Developing Resilience and Adaptability – Preparing for change today and tomorrow

- [PPA - Building Team Synergy](#)
- [PPA - Resilience and You Training](#)
- [PPA - Problem Solving with a Growth Mindset](#)
- [PPA - Identifying Difference as Opportunities](#)

# Appendix 1: Share the Team Profile Mix

Provide this to every virtual team member so everyone can have the same awareness and use the same language.

We all REACH (adapt to different people and situations), however, the profiles will most often be recognizable by the following behaviours.

## Counselor Profile

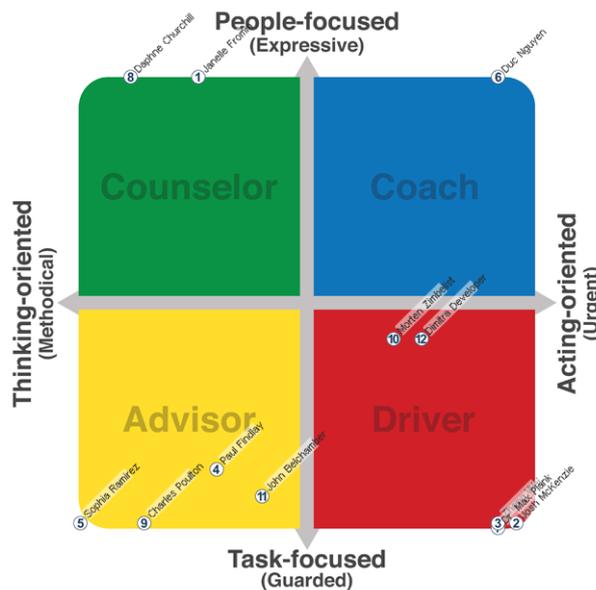
Counselors are best recognized for being: Thinking-oriented and People-focused. The key 'markers' or behaviors of the Counselor Profile include:

- **Focus** on nurturing others
- **Communicating** with a warm, comforting style
- **Conflict-handling** by accommodating others' views
- **Delegating** by 'asking' others for participation
- **Planning** through a careful, flexible approach
- **Recognition** that is personal, private
- **Learning** with careful, step-by-step reflection

## Coach Profile

Coaches are best recognized for being: Acting-oriented and People-focused. The key 'markers' or behaviors of the Coach Profile include:

- **Focus** on networking
- **Communicating** with charisma, dynamic style
- **Conflict-handling** by collaborating on solutions
- **Delegating** by 'selling' others on participation
- **Planning** through a fluid, interactive approach
- **Recognition** that is team incentive
- **Learning** with active, 'big picture' understanding



## Advisor Profile

Advisors are best recognized for being: Thinking-oriented and Task-focused. The key 'markers' or behaviors of the Advisor Profile include:

- **Focus** on knowledge and understanding
- **Communicating** with a reserved, formal style
- **Conflict-handling** by identifying compromises
- **Delegating** by 'teaching' the suggested approach
- **Planning** through methodical, detailed preparation
- **Recognition** that is private, objective
- **Learning** with careful, step-by-step reflection

## Driver Profile

Drivers are best recognized for being: Acting-oriented and Task-focused. The key 'markers' or behaviors of the Driver Profile include:

- **Focus** on accomplishing
- **Communicating** with a focused, intense style
- **Conflict-handling** by directly confronting the issue
- **Delegating** by 'directing' the course of action
- **Planning** through an urgent, adaptive approach
- **Recognition** that is individual incentive, competitive
- **Learning** with active, 'big picture' understanding

# Appendix 2: Help Everyone Be More Aware

Provide this to every virtual team member so everyone can have the same awareness and use the same language.

## Interacting with the Counselor

Try to:

- Focus on building rapport
- Emphasize relationships
- Recognize personal interests

Avoid:

- Rushing the conversation
- Using an impersonal tone
- Overlooking emotional impact

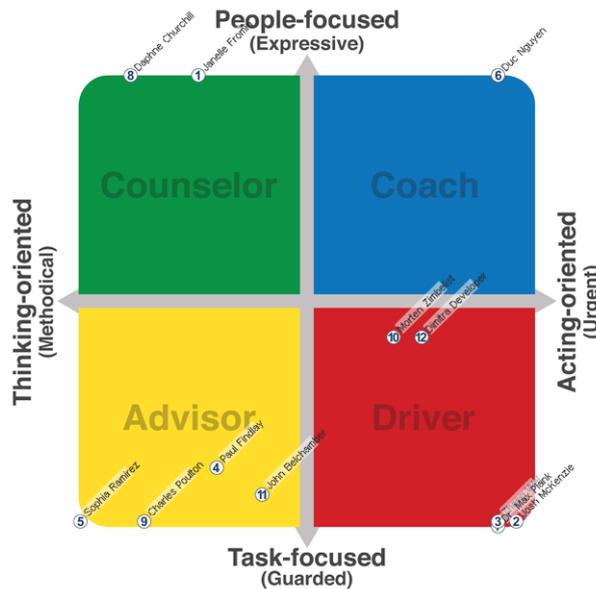
## Interacting with the Coach

Try to:

- Focus on the big picture
- Emphasize impact on people
- Encourage brainstorming

Avoid:

- Sharing unnecessary details
- Limiting their feedback
- Using an impersonal tone



## Interacting with the Advisor

Try to:

- Focus on the details
- Emphasize logic and rationale
- Draw out specific concerns

Avoid:

- Using emotional arguments
- Offering vague expectations
- Pushing for a conclusion

## Interacting with the Driver

Try to:

- Focus on the bottom line
- Emphasize results
- Be clear and specific

Avoid:

- Forcing personal small-talk
- Controlling the conversation
- Challenging their position

# Appendix 4: Individual Development Plans

## Janelle Fromm Current Development Priorities



### Developing Driver Skills (the “What”)

They should consider this list of courses:

#### **Exercising control over processes**

- [Time Management for Managing Projects and Complex Tasks](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Foundation Skills for Elite Personal Assistants and Executive Assistants Training Course](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)
- [Train the Trainer Training](#)

#### **Establishing clear expectations**

- [Supervising Others Training](#)
- [Leadership Development Training](#)
- [Assertiveness and Self Confidence Training](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Foundation Skills for Elite Personal Assistants and Executive Assistants Training Course](#)
- [Manage People and Performance Training](#)
- [Minute-Taking Training](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for Managing Projects and Complex Tasks](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Keeping control of tasks and operations
- How clear are you in defining requirements?
- Giving feedback using the SBI model

## Josh McKenzie Current Development Priorities



### Counselor

#### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

##### **Identifying personal needs**

- [PPA - Building Team Synergy](#)
- [PPA - Identifying Difference as Opportunities](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Business Writing Essentials for the Modern Workplace](#)
- [Business Writing for the Digital Era](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)



### Coach

#### Developing Coach Skills (the “Why”)

They should consider this list of courses:

##### **Easing tensions during conflict**

- [Assertiveness and Self Confidence Training](#)
- [Conflict Resolution Training](#)
- [Supervising Others Training](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Dealing With Difficult People in the Workplace](#)
- [The 10 Dimensions of Effective Leadership](#)

#### Coaching Activities (recommended in the REACH Coaches Companion)

- Identifying and overcoming a weakness
- Resolving internal conflict
- New manager assimilation

## Zhang Wei Current Development Priorities



Counselor

### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

#### Identifying personal needs

- [PPA - Building Team Synergy](#)
- [PPA - Identifying Difference as Opportunities](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Business Writing Essentials for the Modern Workplace](#)
- [Business Writing for the Digital Era](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)

#### Recognizing others' efforts

- [PPA - Identifying Difference as Opportunities](#)
- [Manage People and Performance Training](#)
- [The 10 Dimensions of Effective Leadership](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Identifying and overcoming a weakness
- Recognizing other's efforts
- Resolving internal conflict

## Paul Findlay Current Development Priorities



### Developing Coach Skills (the “Why”)

They should consider this list of courses:

#### **Building rapport**

- [Communication Skills Training](#)
- [Customer Service Training](#)
- [Professional Telephone Skills](#)
- [Sales Training](#)
- [Retail Sales Training](#)
- [Emotional Intelligence \(EQ\) Training](#)
- [Body Language Training](#)
- [Business Etiquette Training](#)
- [Cross Cultural Communication](#)

#### **Easing tensions during conflict**

- [Assertiveness and Self Confidence Training](#)
- [Conflict Resolution Training](#)
- [Supervising Others Training](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Dealing With Difficult People in the Workplace](#)
- [The 10 Dimensions of Effective Leadership](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Matching and mirroring
- Resolving internal conflict
- Knowing my team's strengths

## Sophia Ramirez Current Development Priorities

### Counselor

#### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

##### **Identifying personal needs**

- [PPA - Building Team Synergy](#)
- [PPA - Identifying Difference as Opportunities](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Business Writing Essentials for the Modern Workplace](#)
- [Business Writing for the Digital Era](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)

### Coach

#### Developing Coach Skills (the “Why”)

They should consider this list of courses:

##### **Easing tensions during conflict**

- [Assertiveness and Self Confidence Training](#)
- [Conflict Resolution Training](#)
- [Supervising Others Training](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Dealing With Difficult People in the Workplace](#)
- [The 10 Dimensions of Effective Leadership](#)

#### Coaching Activities (recommended in the REACH Coaches Companion)

- Identifying and overcoming a weakness
- Resolving internal conflict
- Using stories to persuade

## Duc Nguyen Current Development Priorities



### Counselor

#### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

##### **Assimilating team members**

- [Supervising Others Training](#)
- [Cross Cultural Communication](#)
- [The 10 Dimensions of Effective Leadership](#)



### Advisor

#### Developing Advisor Skills (the “How”)

They should consider this list of courses:

##### **Addressing quality concerns**

- [Train the Trainer Training](#)
- [PPA - Problem Solving with a Growth Mindset](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Business Writing for the Digital Era](#)
- [Manage People and Performance Training](#)
- [The 10 Dimensions of Effective Leadership](#)

#### Coaching Activities (recommended in the REACH Coaches Companion)

- New manager assimilation
- Using the 5 Whys technique
- Using a RACI chart

## Dr Max Plank Current Development Priorities



### Coach

#### Developing Coach Skills (the “Why”)

They should consider this list of courses:

#### **Easing tensions during conflict**

- [Assertiveness and Self Confidence Training](#)
- [Conflict Resolution Training](#)
- [Supervising Others Training](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Dealing With Difficult People in the Workplace](#)
- [The 10 Dimensions of Effective Leadership](#)



### Advisor

#### Developing Advisor Skills (the “How”)

They should consider this list of courses:

#### **Addressing quality concerns**

- [Train the Trainer Training](#)
- [PPA - Problem Solving with a Growth Mindset](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Business Writing for the Digital Era](#)
- [Manage People and Performance Training](#)
- [The 10 Dimensions of Effective Leadership](#)

#### Coaching Activities (recommended in the REACH Coaches Companion)

- Resolving internal conflict
- Using the 5 Whys technique
- New manager assimilation

## Daphne Churchill Current Development Priorities



### Developing Driver Skills (the “What”)

They should consider this list of courses:

#### **Evaluating individual performance**

- [Supervising Others Training](#)
- [Leadership Development Training](#)
- [Manage People and Performance Training](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Train the Trainer Training](#)

#### **Exercising control over processes**

- [Time Management for Managing Projects and Complex Tasks](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Foundation Skills for Elite Personal Assistants and Executive Assistants Training Course](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)
- [Train the Trainer Training](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Giving feedback using the SBI model
- Keeping control of tasks and operations
- Problem solving and the ladder of inference

## Charles Poulton Current Development Priorities



### Counselor

#### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

##### **Identifying personal needs**

- [PPA - Building Team Synergy](#)
- [PPA - Identifying Difference as Opportunities](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Business Writing Essentials for the Modern Workplace](#)
- [Business Writing for the Digital Era](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)



### Coach

#### Developing Coach Skills (the “Why”)

They should consider this list of courses:

##### **Building rapport**

- [Communication Skills Training](#)
- [Customer Service Training](#)
- [Professional Telephone Skills](#)
- [Sales Training](#)
- [Retail Sales Training](#)
- [Emotional Intelligence \(EQ\) Training](#)
- [Body Language Training](#)
- [Business Etiquette Training](#)
- [Cross Cultural Communication](#)

#### Coaching Activities (recommended in the REACH Coaches Companion)

- Identifying and overcoming a weakness
- Matching and mirroring
- Resolving internal conflict

## Morten Zimbelist Current Development Priorities



Advisor

### Developing Advisor Skills (the “How”)

They should consider this list of courses:

#### Addressing quality concerns

- [Train the Trainer Training](#)
- [PPA - Problem Solving with a Growth Mindset](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Business Writing for the Digital Era](#)
- [Manage People and Performance Training](#)
- [The 10 Dimensions of Effective Leadership](#)

#### Aligning resources with needs

- [Supervising Others Training](#)
- [Time Management for Managing Projects and Complex Tasks](#)
- [Leadership Development Training](#)
- [Lean Six Sigma Black Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Green Belt Certification Training - Signature Series](#)
- [Lean Six Sigma Yellow Belt Certification Training Signature Series](#)
- [Foundation Skills for Elite Personal Assistants and Executive Assistants Training Course](#)
- [The 10 Dimensions of Effective Leadership](#)
- [Time Management for the Modern Individual](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Using the 5 Whys technique
- Using a RACI chart
- Involve your team in creating an upbeat culture

## John Belchamber Current Development Priorities



### Developing Coach Skills (the “Why”)

They should consider this list of courses:

#### **Building rapport**

- [Communication Skills Training](#)
- [Customer Service Training](#)
- [Professional Telephone Skills](#)
- [Sales Training](#)
- [Retail Sales Training](#)
- [Emotional Intelligence \(EQ\) Training](#)
- [Body Language Training](#)
- [Business Etiquette Training](#)
- [Cross Cultural Communication](#)

#### **Easing tensions during conflict**

- [Assertiveness and Self Confidence Training](#)
- [Conflict Resolution Training](#)
- [Supervising Others Training](#)
- [Advanced Skills for Elite PA's and EA's](#)
- [Dealing With Difficult People in the Workplace](#)
- [The 10 Dimensions of Effective Leadership](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- Matching and mirroring
- Resolving internal conflict
- Knowing my team's strengths

## Dimitra Developer Current Development Priorities

### Counselor

### Developing Counselor Skills (the “Who”)

They should consider this list of courses:

#### **Assimilating team members**

- [Supervising Others Training](#)
- [Cross Cultural Communication](#)
- [The 10 Dimensions of Effective Leadership](#)

#### **Cultivating team spirit**

- [PPA - Building Team Synergy](#)
- [PPA - Identifying Difference as Opportunities](#)
- [PPA - Taking Productivity to the Next Level](#)
- [The 10 Dimensions of Effective Leadership](#)

### Coaching Activities (recommended in the REACH Coaches Companion)

- New manager assimilation
- Involve your team in creating an upbeat culture
- Identifying and overcoming a weakness

We hope this has provided valuable and actionable insights.



## Important Note

The information contained herein describes certain behavioural preferences and tendencies derived from the participants' self-reporting. While such patterns of behaviour tend to be consistent over time, these can change based on circumstances beyond the scope of what has been measured by this survey. Therefore, this information does not represent a comprehensive measure of psychological traits, nor does it claim to represent a prediction of future behaviour. No part of this information is intended to convey a psychological, medical, or psychiatric evaluation, and in no way is this information intended to convey an evaluation of employability. This information is intended to provide insight that is useful in coaching, team-building, and other aspects of professional development and training. No employment decision should be made based, in whole or in part, on the results contained herein, and no indication of suitability for employment should be inferred or implied based on the REACH Survey.