



# WORKBOOK



## Culture Assessment

Ready to take a real look at your team culture? **Let's do it.**

*Culture Series | Workbook #1*

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# Culture Assessment

*Let's review the roadmap to assessing your team.*

01

## **Reflect**

First, let's reflect on what your team culture looks like. When you think of how your team interacts with each other, customers, and you, what words come to mind?

Be brutally honest. A rose-colored picture won't help you move forward.

02

## **Respond**

You've chosen the words that reflect your team, how do they make you feel? Are they close to what you strive for?

Let's explore how you feel about the current state of your team.

03

## **Dream**

Paint the prettiest picture you can of your dream team. What does it look like?

What can you find in the current state of your team that reflects a bit of the coveted dream team status?

04

## **Grow**

What theme do you see in the picture you painted of your dream team? What can you turn into action steps?

Let's plan how are you going to move from current state to a state of consistent growth.

# Reflect

First, let's reflect on what your team culture looks like. When you think of how your team interacts with each other, customers, and you, what words come to mind?

Be brutally honest. A rose-colored picture won't help you move forward.

*Think about your team as a whole - how they interact with anyone in the community (each other, customers, etc.) Choose 5 words to describe how they function. Some examples include: passionate, reactive, proactive, dependent, inflexible, progressive, etc.*

01

*Think about how your team interacts with each other versus how they interact with customers, clients, or families. Choose 5 words to describe interactions for each group. (10 words total)*

02

*Think about how your team interacts with administration or leadership. Choose 5 words to describe interactions.*

03

# Respond

You've chosen the words that reflect your team, how do they make you feel? Are they close to what you strive for?

Let's explore how you feel about the current state of your team.

*If you were brutally honest, not all of the words you used in box 01 above are what you want to describe your team as. Respond to how that makes you feel. Frustrated with your team? Guilty? Anxious because you aren't sure how to change it? Take a couple minutes to think & respond.*

01

*Review box 02 above, comparing the words in each group. There are always differences in how we interact with our team and our customers. What we are looking for is inconsistency in the underlying culture. This could look like the team being overly kind to a customer to their face, but bashing them to a teammate. Reflect on times you have seen this type of inconsistency.*

02

*Onto box 03, with clearer understanding of how your team interacts with each other and the community, now reflect on the words you chose for how the team interacts with leadership. Using a similar process to the box above, how does it make you feel? Inconsistencies?*

03

# Dream

Paint the prettiest picture you can of your dream team. What does it look like?

What can you find in the current state of your team that reflects a bit of the coveted dream team status?

*Back to choosing 5 words to describe your team as a whole, but this time think of your dream team. Examples could be inclusive, flexible, collaborative, empathetic, etc.*

01

*What traits do you see in your current team that are reminiscent of your dream team?*

02

*Using the words you chose, write a couple sentences describing what your dream team looks like. Dream big. For example, you could explain how your dream team would handle an upset customer.*

03

# Grow

What theme do you see in the picture you painted of your dream team? What can you turn into action steps?

Let's plan how are you going to move from the current state to consistent growth.

*You dreamed big about what your team could be on the previous page. Now let's take that dream and put it into actionable steps. What is the biggest challenge you have in making this dream a reality?*

01

*If you could do 1 thing everyday for 30 days to move the needle on this change, what would it be? Example: I want my team to value relationship, so I will recognize someone each day for a specific action they took that promoted relationship.*

02

*How can you scale this action? Example: I have promoted relationship through personal recognition each day for 30 days, now I am mentoring my co-worker to begin this practice as well. Once you plan to scale the action, repeat the process for the next needle-moving action.*

03

# Culture Assessment

*You've reflected on your current state, dreamed of where you want to be, and planned for progress. You are on your way to creating the culture you want.*

?

## ***What's Next?***

Use the action step you created in the Grow phase of the assessment to get started. Then repeat the process and scale from there.

Be sure to assess how your small actions are coming at least every quarter. Are you seeing the team progress to your dream team descriptors? Consistency is key!

01

## ***Want a Partner?***

Digging into your team's daily action to assess your culture can be hard to do from the inside out.

Let's partner to complete this assessment tool & make your plan together!

<https://calendly.com/chelsearobberson/culture-assessment>

02

## ***Part 2: Ready to Build a Vision Narrative?***

Now that you have assessed your team, set some goals, and taken steps toward making your dream a reality, let's outline the big picture of what you are building.

A vision narrative is an outline of how your team functions that reads like a first-person novel. It is a tool to help you clarify the small things to create the big picture. 'Go slow to go fast.'