



AUDIOBOOK

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# REFERENCE GUIDE

PRESENTED BY

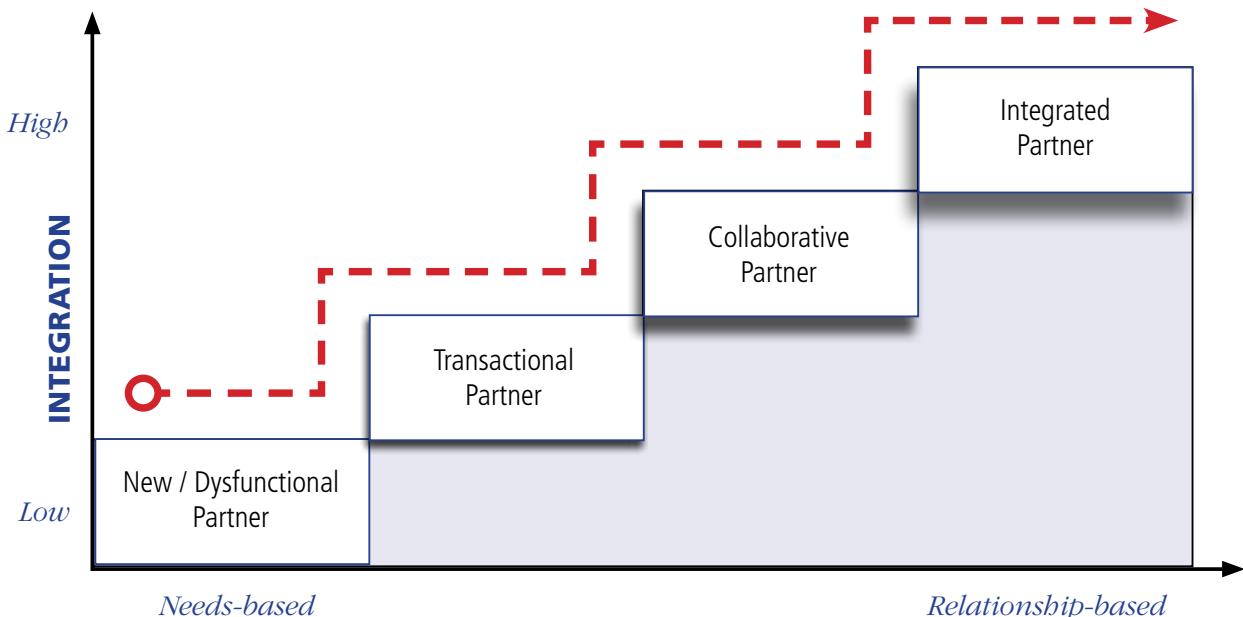


## VISUAL #1

### The Matrix-Partner Continuum™

The vertical axis here is the degree to which partners integrate or organize their work around each other—to what extent they align goals, make decisions and plan based on the other's business. Ryan, a global project leader, defined the highest level of partnering as “when you are willing to change the way you do business or change your goals or your direction based on input and expertise from another person.”

The Needs-to-Relationship axis is based on the degree to which the partnership is grounded solely in the business need or extended or enhanced based on the relationship. It is assumed any partnership in a matrix includes a business need (otherwise these relationships are at-will friendships), but movement through this continuum is dependent on extending beyond “I work with you because I need you” to “I work with you because you make me better at what I do.”



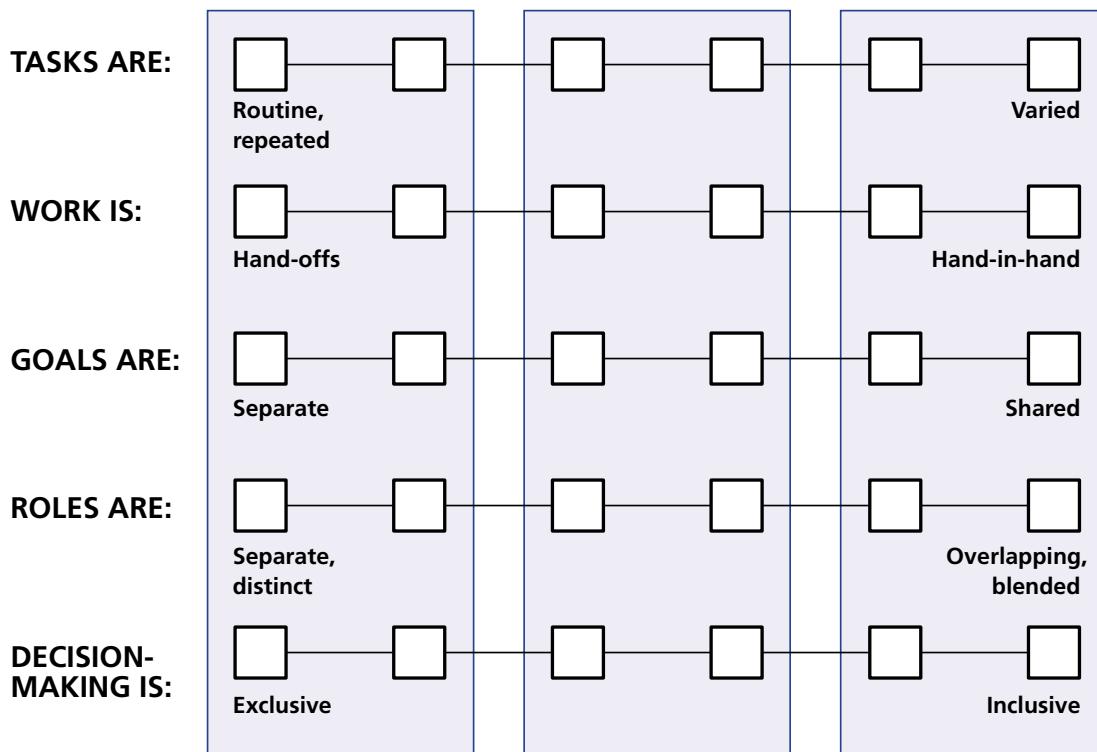
## VISUAL #2

### The Fit Test

Evaluate the fit of a key partnership you checked off on the previous page.

Put an **X** on where you are currently, in terms of the work you do together.

Put a **✓** where you think the situation (business need, project, etc.) requires you to be.



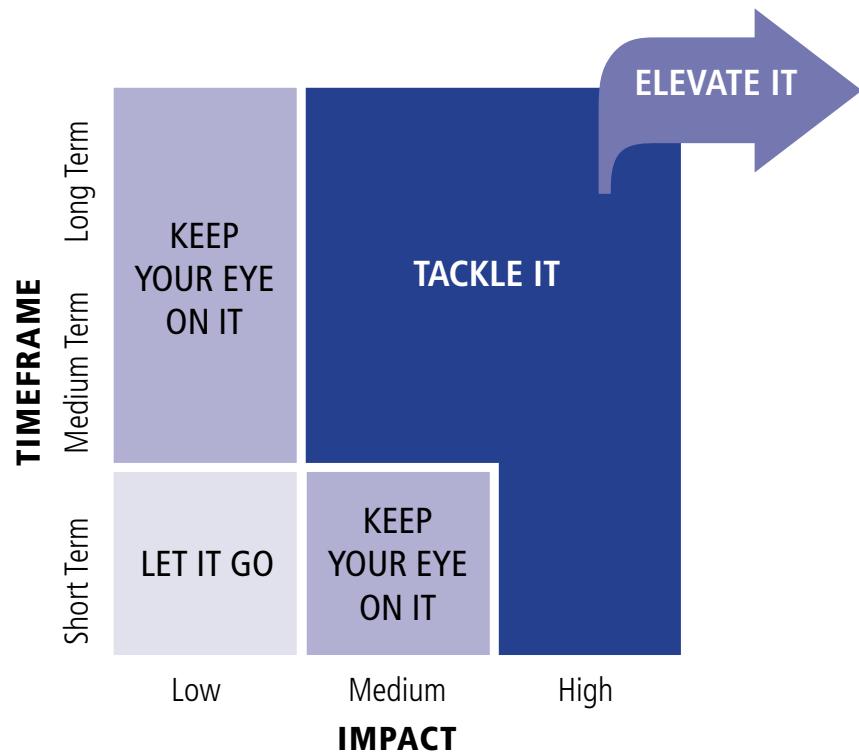
If the majority of the checkmarks indicating your current needs are in the left column, the situation calls for a Transactional Partnership, the middle a Collaborative Partnership and in the right column an Integrated Partnership.

Any disparity between the current and desired states of the partnership may indicate the need to invest in that partnership. Now take a look at your “**X**”s. Do they line up in the same columns as your “**✓**”?

## VISUAL #3

### Triage in Goal Alignment

Here's what Triage looks like in goal alignment:



## VISUAL #4

### Sample RACI

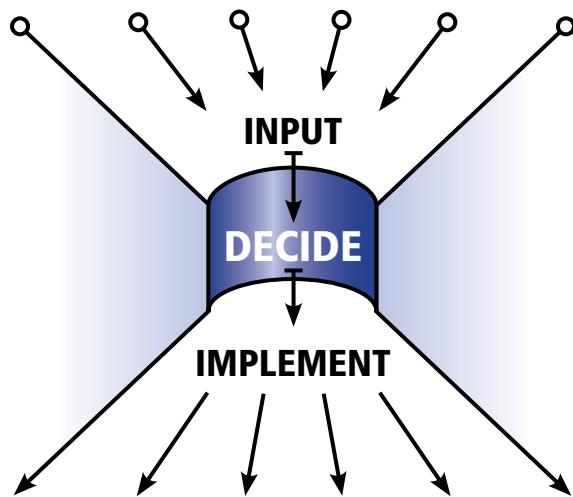
The most widely used method for detailed role defining, called a RACI chart, outlines who is **Responsible**, **Accountable**, **Consulted** or **Informed** on a task or decision. RAPID (**R**esponsible, **A**ccountable, **P**erform, **I**nform, **D**ecide) and RASCI (**R**esponsible, **A**ccountable, **S**upporting, **C**onsulted, **I**nformed) are also variations.

For the Succession Planning Process, Don and Diana's chart may have looked something like this:

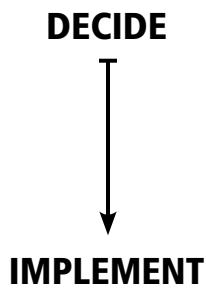
	<b>RESPONSIBLE:</b> Responsible for completing a work product	<b>ACCOUNTABLE:</b> Ensures this task is completed	<b>CONSULT:</b> Gives input into how task is carried out or into work product	<b>INFORM:</b> Kept apprised of progress and outcome
<b>DECISIONS/TASKS</b>				
Working with cost center managers to complete budget paperwork	Don	Bob (corporate process owner)	Angel	Diana
	Don	Bob (corporate process owner)	Diana	Angel
	Diana	Nancy (Diana's boss)	Don	Angel
	Diana	Nancy (Diana's boss)	Don	Bob (corporate process owner)
	Don	Bob (corporate process owner)	Diana	Angel
	Angel's management team	Angel	Don	Diana

**VISUAL #5****Balance & Toggle Your Decision-Making Styles**

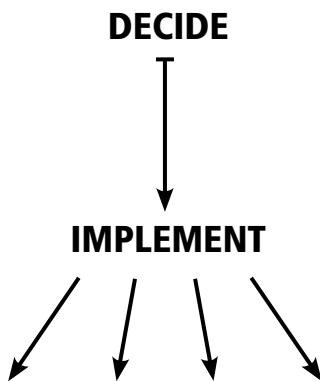
The most effective matrix decision-making process:



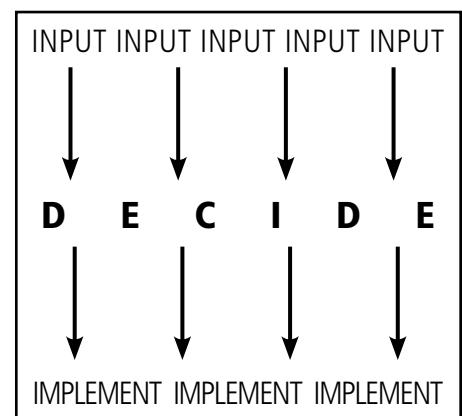
Victoria's approach:



If Victoria had invested in broader implementation:

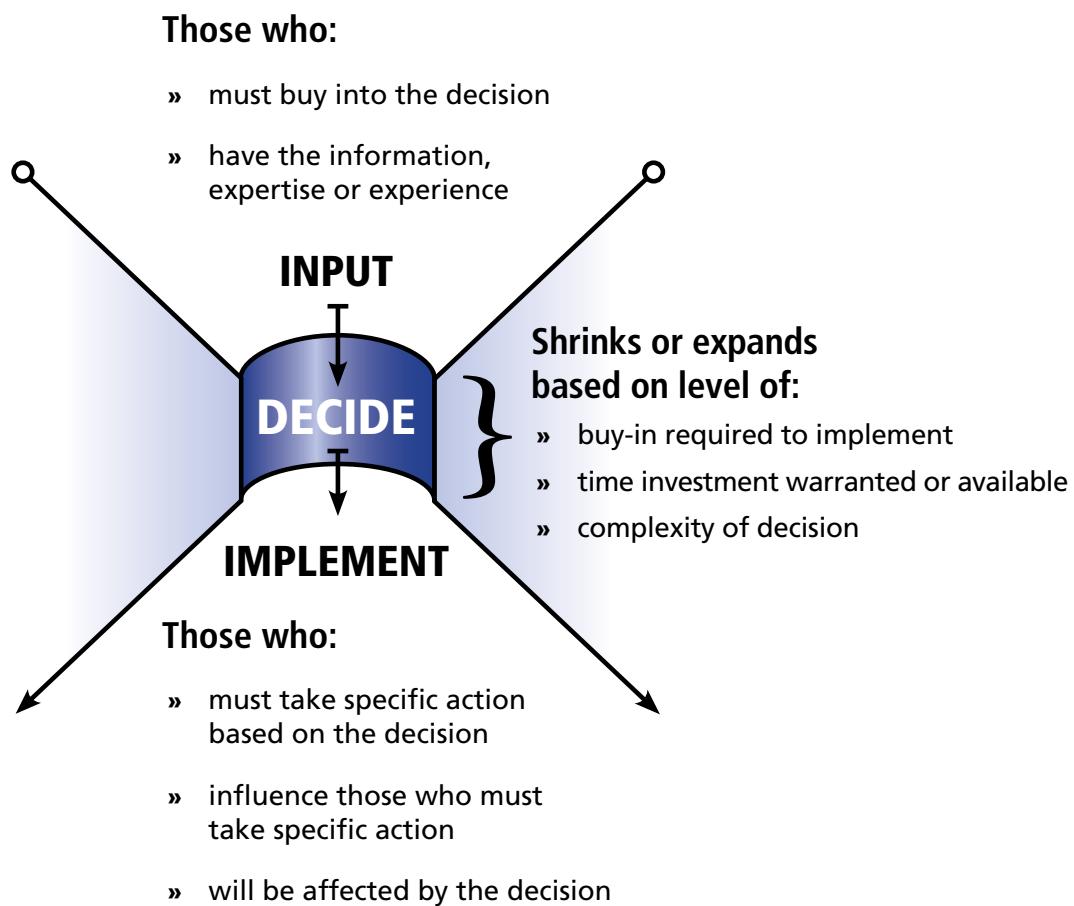


Marcus' approach:



**VISUAL #6****Balance & Toggle Your Decision-Making Styles**

Knowing whom to pull in when is the key to balancing inclusion with speed and toggling between different decision-making approaches. You have to narrow at some point. Having clear roles helps (Essential #3), as do these considerations:





## VISUAL #7

### Watch Your Biases

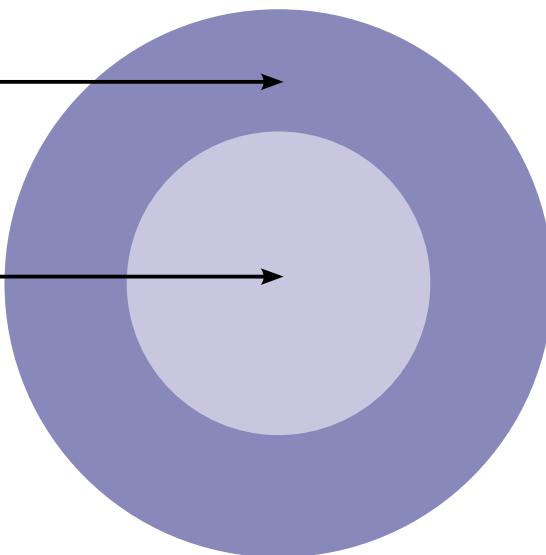
MATRIX ROLE	MATRIX BIAS
Reporting Relationship	Align more closely with one boss versus another based on common function, geography, exposure or style.
Customer Hub	Align so vehemently with a customer that it impacts ability to understand and appreciate the perspective/needs of the internal matrix
Project Team	Align so vehemently with a project that it impacts ability to understand and appreciate the perspective/needs of the functions represented on the team
Cross-functional Team	Put more weight on information from your own functional area because of your understanding and familiarity with it

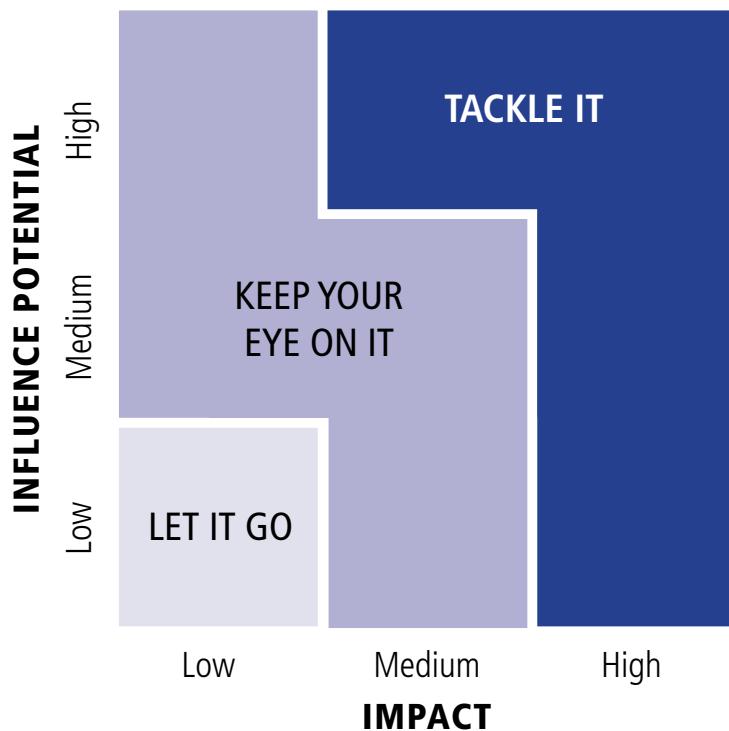
## VISUAL #8

### Building Influence Muscle

**CONCERN:** —————→  
Things that worry,  
bother, frustrate

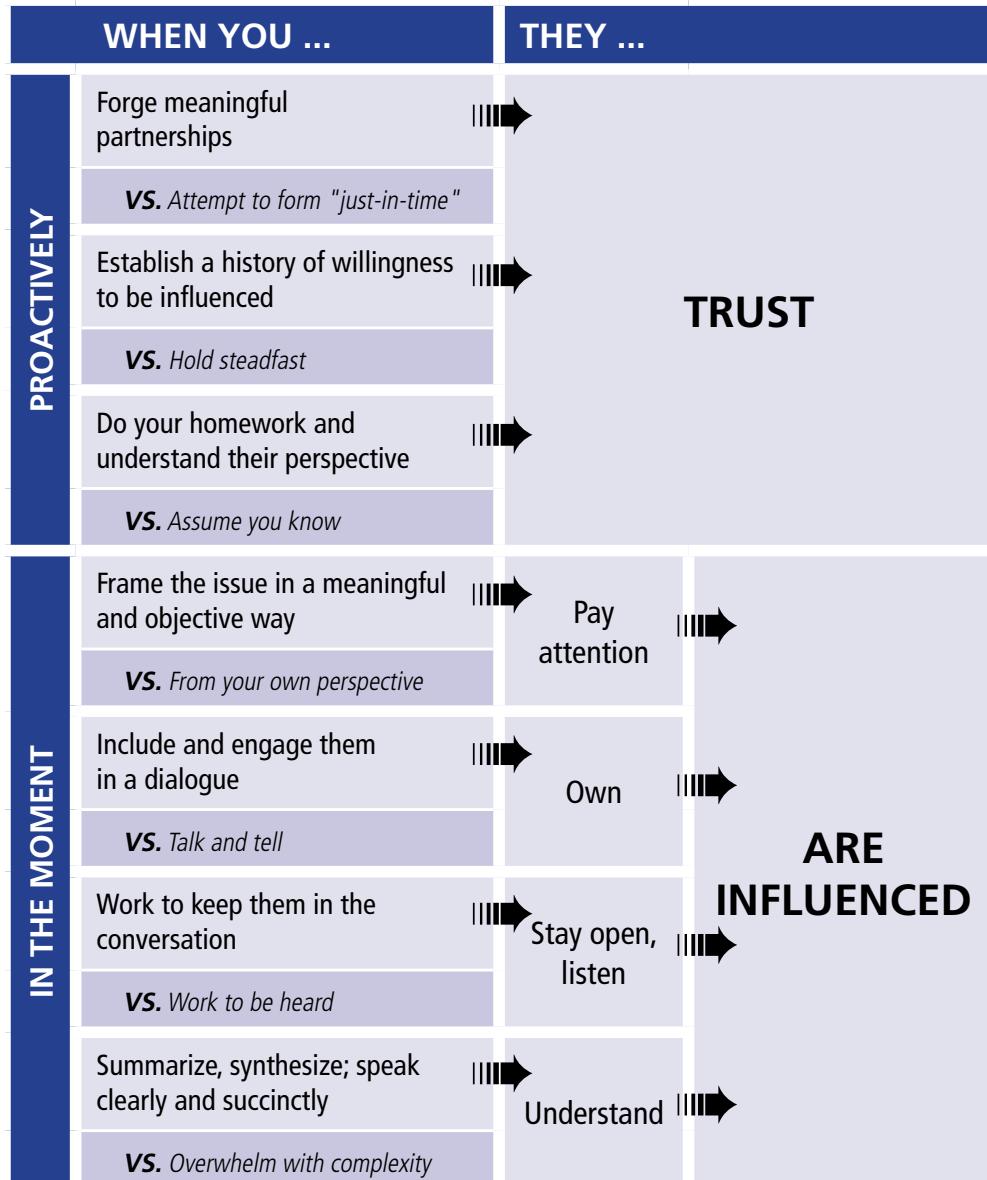
**INFLUENCE:** —————→  
Things you can do  
something about



**VISUAL #9****Triaging Items In Your Circle Of Concern**

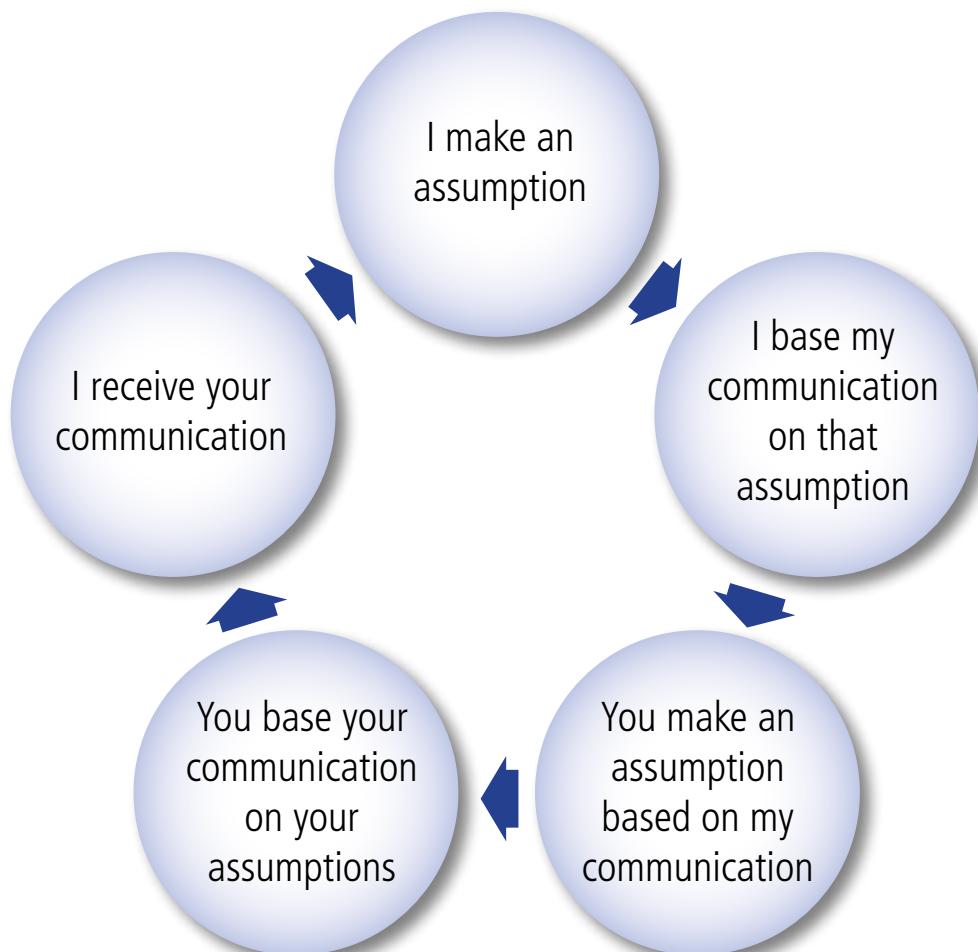
## VISUAL #10

## Influence Ingredients: Proactive And In The Moment



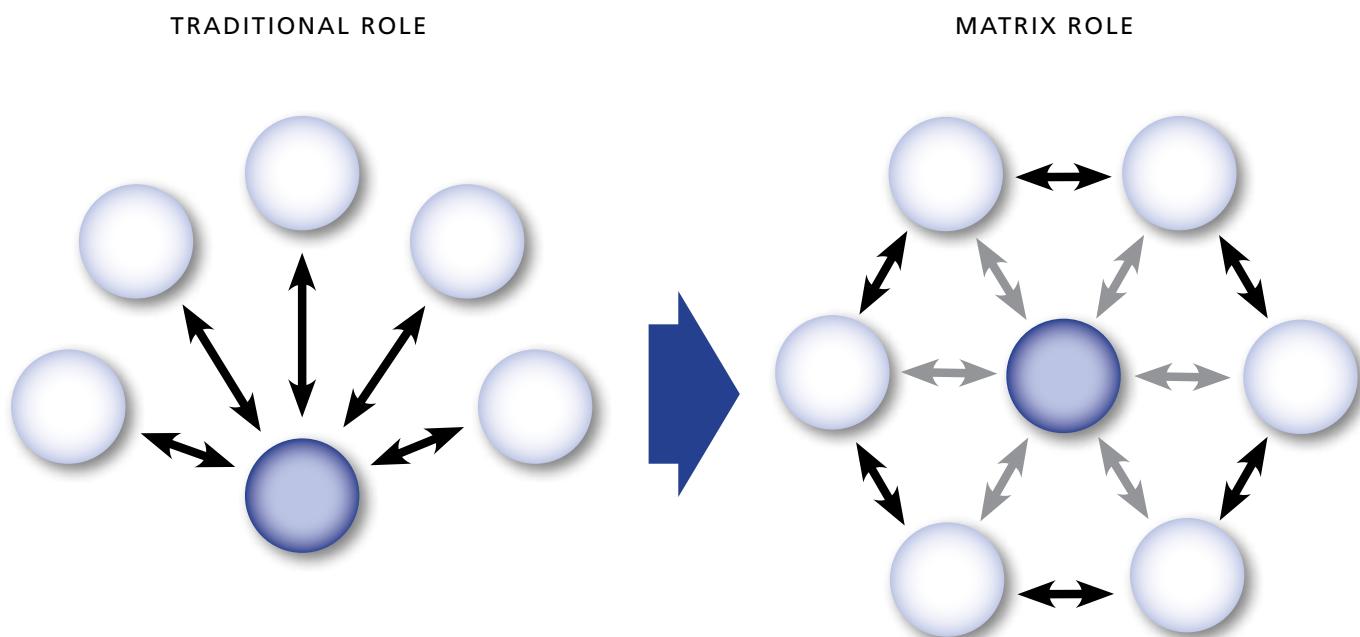
## VISUAL #11

## The Assumption Cycle



## VISUAL #12

### Communication: Traditional vs. Matrix Roles



**VISUAL #13****Meetings: Craft Your Agenda**

A typical outcome-focused agenda has three phases: (1) get grounded, (2) discuss and (3) land.

Jeanine's meeting might look as a list of topics vs. the three phases:

LIST OF TOPICS AGENDA	STRUCTURED THOUGHT PATTERN AGENDA
<p><i>Meeting Outcome: To review customer data and decide what we will act on and when</i></p> <p>9:00 – 9:15 Customer feedback on current pricing</p> <p>9:15 – 9:30 Customer feedback on new delivery method</p> <p>9:30 – 10:00 Customer feedback on Returns policy</p>	<p><i>Meeting Outcome: To review customer data and decide what we will act on and when</i></p> <p>9:00 – 9:15 Review key customer data on pricing and delivery method [Get grounded]</p> <p>9:15 – 9:45 Identify which issues have biggest impact on customer retention [Discuss]</p> <p>9:45 – 10:00 Determine next steps and owners for priority items [Land]</p>