



On Lead, Agree, Coach

HOW TO GROW BY LEAVING MICROMANAGEMENT BEHIND

By Mark Abbott, Sergiu Simmel, and Tommy Mains | April 2023 | Ninety





A Message from the CEO

At Ninety, we get how hard it is to build, run, and scale organizations. Our cloud-based Business Operating System (BOS) platform contains each of the essential concepts, tools, and disciplines leaders need to upgrade their BOS and become great company builders.

We believe we're moving into a new age of Work – what we refer to as [the Age of Understanding, or Work 8.0](#). The coming of this age was inevitable, but the pandemic accelerated its arrival by about ten years as so many people transitioned to remote or hybrid work models.

When we say Work, we mean finding value and purpose in our occupational roles – not just punching a time clock.

One of the most notable characteristics of Work 8.0 is that we now have an almost infinite array of opportunities to find Work. This shift will see more and more people reshuffling where and how they Work.

The good news is we've been studying business building for decades and have a well-informed, time-tested understanding of the essential concepts, tools, and disciplines needed to master great company building.

In short, great companies understand who they are, what they are, where they are, where they want to go, and what it's going to take to get there.

This guide is all about how to master a particular skill, discipline, or toolset. It's one of an array of guides associated with how to build a great company.

Across all our content, rest assured that our relentless focus will always be to simplify the hard work of aligning and focusing teams so organizations and their employees can thrive.

Gratefully,

Mark Abbott
CEO + Founder, Ninety.io

Purpose

This Guide is part of our series on the skills necessary to lead a great team. We believe we're moving away from the era of "managing" people, with its limitations and temptations toward micromanagement, and moving into the era of leading and coaching people based on mutual [agreements](#). We call this **Lead, Agree, Coach**.

This guide addresses the big idea that great leaders build [high-trust relationships](#) by not only leading but also coaching their teams, helping them grow both as a team and as individuals. Why do we emphasize these skills? Because without great leaders and coaches, no team can perform well and contribute consistently to turning a business into a great company.

While thousands of books and articles have been written about what makes great leaders and great coaches, we've distilled it down to 12 Core Disciplines: six for leadership and six for coaching. We based these disciplines on our decades of helping teams [Get Smart Stuff Done](#) (GSSD), achieve breakthroughs, grow their business, and build great companies.

We're happy to share our roadmap because delivering free high-impact company-building content is part of our mission to help organizations focus, align, and thrive.

LET'S DIVE IN.

- **Read it**
 - » We've designed this guide to make it easy to quickly absorb the information. Skim for highlights, glance for big ideas, or dive in for a deeper understanding.
- **Save it**
 - » Continue to use this guide as a high-value reference. Highlight, underline, or circle what's most useful. We've even left space for notes.
- **Share it**
 - » The information and advice on these pages should be shared. We deeply believe that useful resources should be accessible to all.

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Lead, Agree, Coach



Why Lead, Agree, and Coach?

Lead, Agree, Coach

The key to building a great company is cultivating **high-trust relationships** with all our stakeholders — our customers, team members, Senior Leadership Team, vendors, strategic partners, investors, and society itself.

High-trust relationships within an organization pave the way for high-trust relationships with its external stakeholders. Team members who trust their leaders and each other tend to create high-trust relationships with clients, suppliers, and other business partners. In our experience, teams with high levels of trust also tend to be trusted by investors and other external stakeholders.

How do our team members come to trust their leaders and each other? At Ninety, we distinguish three sources of trust:

1. Trust based on **Character**. People trust you when they sense disciplined mental and moral qualities about you. These typically include honesty, transparency, and directness. People trust you because they believe you say what you mean.
2. Trust based on **Competency**. People trust you when they sense you have the necessary skills, abilities, and knowledge to execute your Roles and Responsibilities and deliver on your commitments. Proving to be competent means your people trust you to lead them toward their goals and coach them on how to get from here to there.
3. Trust based on **Connection**. People trust you when you establish strong emotional connections with them and when you have shared interests, goals, and values. We develop connection-based Trust by investing time and resources and having compatible interests, aligned goals, and mutual respect.

Nearly every industry is the same in this regard: team members who don't like working for their boss are much more likely to quit. To foster enduring high-trust relationships between leaders and team members, organizations will benefit by their leaders master the concepts, tools, and disciplines associated with a leadership style we call Lead, Agree, Coach:

Lead: Teams follow strong, confident, and effective leaders. Strong leaders have followers who enter into and live up to performance-based agreements and meet their goals to help the organization grow.

Agree: Team leaders and their team members enter into, accept, and ultimately fulfill several clear agreements. These agreements are among themselves and between each member and the leader. The team is likely to stumble — or worse — unless it consistently enters into and fulfills clear agreements.

Coach: We all want to matter and evolve. Team members appreciate an appropriate level of developmental input. Without ongoing coaching, team members are far less likely to feel seen, understood, and supported.

It's hard to lead your team effectively unless you can coach your followers (your team members). Conversely, effectively coaching your people is difficult unless you can lead your entire team effectively. Leading and Coaching are inseparable!

What Is Leading and Coaching?

Lead, Agree, Coach

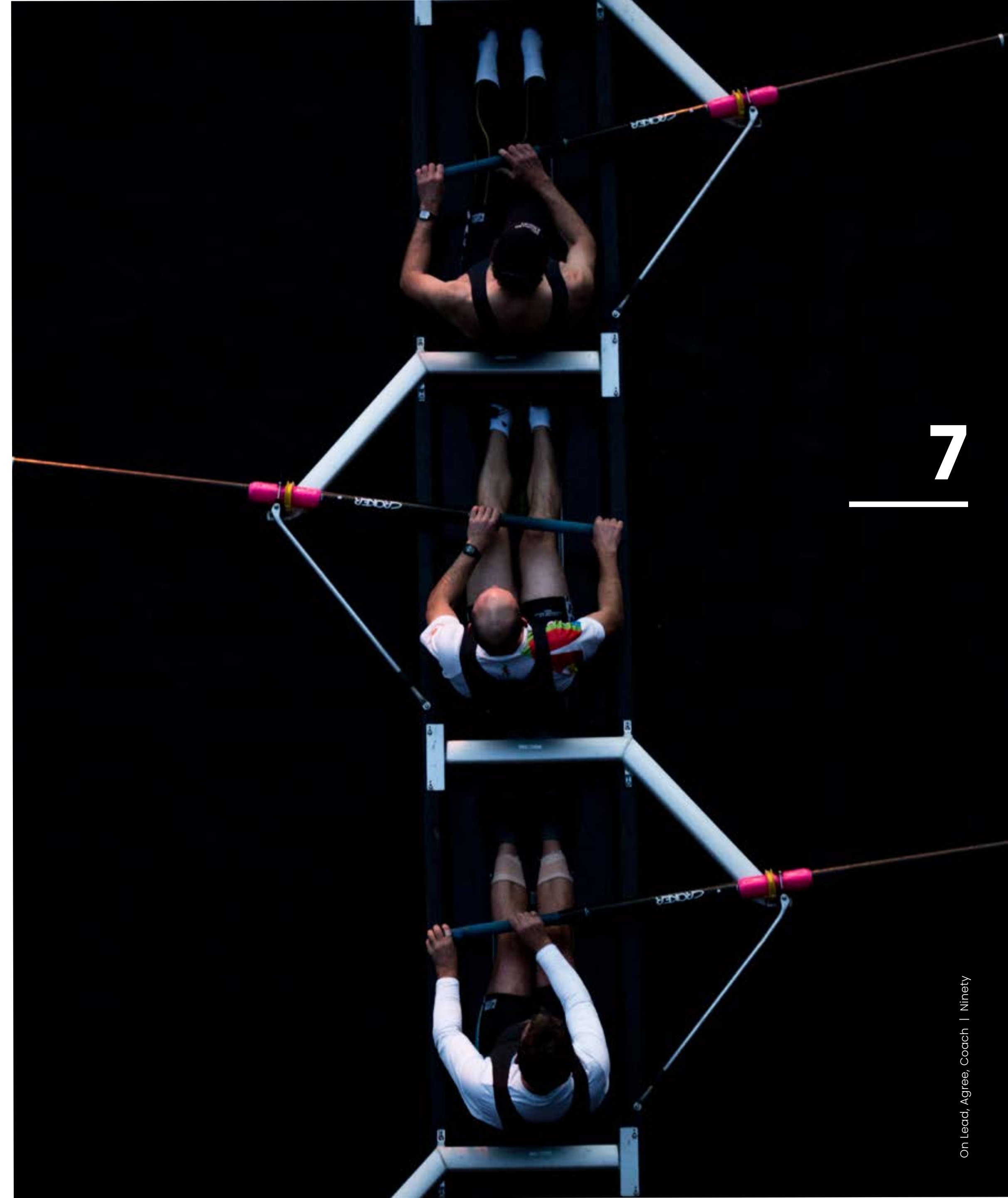
Business literature often uses terms such as leadership, management, coaching, mentoring, and others interchangeably. We distinguish between these to bring clarity to our conversations.

A **leader** leads by looking outward from the team they lead. Leaders lead teams toward some destination. The team is behind, following the leader.

- In sports – a championship or a gold medal.
- In mountaineering – the top of the mountain.
- In business – a goal, a market position, an acquisition, or an initial public offering.

A **coach** coaches by looking inward to the individuals they coach. The individuals face the coach, receiving the coaching. Coaches coach team members to enable them to perform well as individuals and as team members.

- In sports – scoring or preventing the opponent from scoring.
- In mountaineering – preserving energy and sustaining long days of climbing.
- In organizations – communication, inspiration, cooperation, and so on.



Leading: What Do We Mean by It?

Lead, Agree, Coach

Leading is all about moving a team toward a compelling goal.

Leaders lead teams toward a destination. In business, a leader's followers typically comprise executive, project, or front-line teams. We can even view an entire organization as a team.

Leading is guiding a team. Leaders figure out the destinations and directions to take their team members and then guide them on that journey. We refer to those destinations as [Compelling and Audacious Goals](#) (CAGs) – long-term goals that inspire, guide, and require sustained effort from everyone in the organization.

Leading is about the where, the why, the what, and the when.

- **Where** – Leaders clearly define where the team aims to go. What are the team's Compelling and Audacious Goals? Does the prospective journey appear worthy of our time and energy?
- **Why** – Leaders formulate a purpose. Why are we pursuing those CAGs? What's our purpose as a team and as an organization?
- **What** – Leaders clearly define the milestones the team needs to achieve. What problems is the team solving? What industry or niche does the organization serve? What value does the team provide to its stakeholders?
- **When** – Finally, leaders place these answers on a timeline. When is the team aiming to achieve its purpose? When is the team aiming to reach its CAGs? When is the team aiming to solve the problems for its customers?

Leading is about working **on** the business by going beyond the day-to-day operations and answering the why, where, what, and when questions addressed above.



Coaching is about the team and each team member as a person. Coaches guide the team and the individuals within the team. It's about the team's and its members' development, effectiveness, efficiency, fulfillment, accomplishments, and joy in doing their job. It's about [turning work into Work](#) (with a capital "W") – Roles and Responsibilities we love fulfilling. It's about instilling in the team and each team member a sense that they matter as a team and to the entire organization.

Coaching is not about the coach. It's not about satisfying the coach's needs, desires, or metrics. It's not about the coach's success – it's all about the success of our team and our followers.

Coaching is about inspiring. It's about bringing every team member to a state of flow. It's about inspiring the person to break through their self-limiting beliefs. People who function at their best grow toward expanding their potential, developing and leveraging more and more of their innate abilities.

Coaching is about the who and the how.

- **Who** – Coaches clearly understand the ideal persons for each Seat. To get the [Right Person for the Right Seat](#), filter candidates through your Core Values, check for cultural fit, and ensure they have the Competency, Commitment, and Capacity (CCC) for the role.
- **How** – Coaches provide tools to enable growth, connection, and meaning. Coaches build up team members to fulfill their Seat's [Roles and Responsibilities](#) (R&R) and achieve the goals and metrics for the team's success.

Coaching the person is about working with and for each team member. While several people may fulfill the same function, each person is unique. Some coaching may apply to all team members, but we recommend also personalizing your coaching approach to each individual.

WHAT IS A SEAT?

A Seat refers to a specific role or position in an organization. We practice organizing a [Responsibilities Chart](#) by function-specific Seats and then finding the Right Person for each Seat.

Agreements: What Are They?

Lead, Agree, Coach

The stakeholders of any organization form [expectations](#) about their relationship. These **expectations** should be turned into clear agreements between the organization and its stakeholders.

Agreements are arrangements that all parties accept in a transaction. We're going to focus on the essential agreements the members of the Senior Leadership Team (SLT) make with our team members.

- » Purpose/Passion/Just Cause
- » Core Values
- » Roles and Responsibilities
- » Structure
- » Industry and Niche
- » Ideal Customer
- » Unique Value Proposition
- » Customer Journey
- » Compelling and Audacious Goals
- » 3-Year Goals
- » 1-Year Goals
- » 90-Day Goals (aka Rocks)

Inside a department, leaders also make agreements with their team members.

- » 3-Year Goals
- » 1-Year Goals
- » Rocks
- » KPIs
- » To-Dos

If you're the company's leader, you're responsible for clarifying what agreements are essential, why they're established, and what the company will look like when the agreement is fulfilled. If you're a team leader, you're responsible for establishing agreements that are consistent with and supportive of the company's agreements.

As a team's coach, you're responsible for defining agreements with your team and its members, how they will be fulfilled, and how we're doing collectively as a team and one-on-one.

To learn more about these agreements and the concepts, tools, and disciplines we teach, explore our [90u Library](#).



The Six Core Disciplines of Leading



THE SIX CORE DISCIPLINES OF LEADING

- 1. Have a Compelling Vision**
- 2. Honor Your Focus Filters**
- 3. Provide Necessary Resources**
- 4. Focus On Who, Not How**
- 5. Be an Example**
- 6. Be Open, Honest, and Transparent**

#1: Have a Compelling Vision

The Six Core Disciplines of Leading

Leaders must have a coherent, actionable, and compelling vision for the team. They create destinations for the team's journey and express them clearly. For the SLT, that vision is the [Vision](#) for the entire company. Other teams' Visions include select aspects:

SLT ONLY	EVERY TEAM
<ul style="list-style-type: none">• Core Values — Who we are as a people• Purpose/Passion/Just Cause — Why we do what we do, how we collectively make life better• Ideal Customer — Who we serve• Unique Value Proposition — What we provide	<ul style="list-style-type: none">• Purpose within the organization — What we're responsible for inside our organization• Goals, including CAGs — Where we're going• SWOT — Where we are

Team leaders are responsible for creating and clearly communicating their team's Vision.

However, just expressing it isn't enough. Our Vision must be compelling for the team, inspiring team members to follow us as their leader to a series of destinations, as well as making sense both intellectually and emotionally.

The Vision for departmental and sub-departmental teams should also align with the Vision of the larger team it's a part of. For example, if you're a department leader, your Vision for the department should fully align with the Vision of the SLT.

Every team should eventually have its own set of goals. These [goals should be SMART](#) — Specific, Measurable, Achievable, Relevant, and Time-bound. We recommend that team leaders define their team's goals clearly with an accurate timeline for completion — What must be accomplished? By when must it be accomplished?

Leaders should perform a [SWOT analysis](#) for their team once a year to constantly seek awareness of their team's potential (internal Strengths and external Opportunities) as well as challenges (internal Weaknesses and external Threats).

In summary, a team leader should be able to answer "Yes!" to the following questions:

- Do I know where we're going?
- Do I know why we're going there?
- Do I know what goals we must reach to get us there?
- Does my team buy into our goals?
- Am I fully aligned with the organization's Vision?
- Am I fully aware of my team's potential and challenges?

#2: Honor Your Focus Filters

The Six Core Disciplines of Leading

Leaders of any team should always adhere to their organization's Vision. What does this mean in actual practice?

It means understanding and agreeing with all the core components of that Vision. These core components are called Focus Filters because we use them to filter out decisions that don't focus on our Vision.

An organization's Focus Filters include:

- **Core Values** – The important, relevant, and enduring qualities that represent who we are as people and a company.
- **Purpose/Passion/Just Cause** – The reason our organization exists; the motivators that drive us daily; an appealing future state to work toward.
- **Compelling and Audacious Goals (CAGs)** – The long-term goal(s) that inspire and challenge us and drive our other goals.
- **Structure** – The defined functions (or departments) within our organization and the Roles and Responsibilities of each Seat.
- **3-Year Goals** – The quantitative and qualitative goals we need to accomplish in three years to help us realize our CAGs.
- **1-Year Goals** – The quantitative and qualitative goals to achieve in the current year.
- **Rocks** – The qualitative 90-day goals that advance our organization toward accomplishing longer-term goals.
- **Ideal Customers** – Who our company serves; the specific customers who fit our geographic, demographic, and psychographic characteristics.
- **Unique Value Proposition** – Our value-creation promise shows how we provide value to our Ideal Customers.



#3: Provide the Necessary Resources

The Six Core Disciplines of Leading

Having a compelling Vision for our team and honoring our organization's Focus Filters are key. But they mean little in actual practice unless we provide our team with the necessary resources.

What resources are we talking about?

- **People** — Do we have the right people (and enough of them) on the team at the right time to turn the Vision into reality while honoring our organization's Focus Filters?
- **Processes** — Are the [processes](#) our team follows sufficiently documented, effective, and efficient enough for us to deliver on our agreements to our stakeholders?
- **Tools** — Are the people in our team equipped with the tools necessary to help us turn our Vision into reality?
- **Training** — Do our team members need additional training to deliver on their agreements and easily use the tools we provided?
- **Technology** — Does our team have the required technology, and is our tech well-implemented?
- **Time** — Are we giving our people reasonable time to turn the Vision into reality while honoring our organization's Focus Filters?

If we can answer each of these questions with a strong "Yes," we've provided our team with the necessary resources to be successful. Without that certainty, team leaders should pause and take action to turn each answer into a confident "Yes!"

Leading a team in executing its Vision requires focus. The question is: focus on what? We often get distracted by how team members should execute. Strong leaders focus instead on *who* the team members are and *what* the team members should accomplish. Of those two, the best leaders spend most of their time and energy on the *who*.

STRUCTURE

Structure the team based not on who is on the team but on what the team needs to accomplish. The structure must reflect how we divide and conquer. This is can difficult if, over time, we've let the organizational structure deteriorate by using immediate patches to solve immediate needs, a practice that often rewards individuals by modifying the team structure to meet their needs instead of the organization's long-term needs.

Leading a team well requires us to avoid these compromises. Structure your team to support meeting its goals both effectively and efficiently. As goals evolve, so should the organizational structure that supports them. At Ninety, we use the [Responsibilities Chart](#) to express the organizational structure by designing (or redesigning) it with the specific Seats needed not just for the current state of the company, but its future state, with awareness of where we'll be six, nine, or even twelve months out — then adding people into the resulting Seats when appropriate.

PEOPLE

Who gets to occupy each Seat in the organizational structure? To paraphrase Jim Collins, we must put the Right People in the Right Seats. This is not a trivial task. What makes a person the "Right Person" for a Seat in the organizational structure?

- **Cultural Fit** — Does that person embrace and live our Core Values? Can they relate with their teammates? Can they contribute to the team's health and productivity?

- **Competency** — Does that person have the requisite skills and experience to fulfill the Roles and Responsibilities of the Seat consistently?
- **Commitment** — Does that person have the energy and enthusiasm to not only perform the role but enjoy it as well? Does that person seek continual improvement and, ultimately, mastery of the role?
- **Capacity** — Does that person possess the innate ability to perform a task based on physical, mental, and emotional strength?

UNIQUE ABILITY®

Great leaders constantly acknowledge and respect what Dan Sullivan termed that person's Unique Ability — their superior skill, passion, energy, and desire for improvement. **Great leaders continuously respect and cater to their team members' Unique Abilities.** By doing so, we help ensure that our team consistently lives up to its agreements.

WORK

Once you've structured your team in alignment with its goals, placed the Right People in the Right Seats, and acknowledged each team member's Unique Ability, the productive thing to do is to move aside and let your people carry out their Work their way.

Many leaders fumble through this process by micromanaging their teams. They obsess over **how** things get done instead of **what** things get done. This doesn't mean leaders shouldn't provide advice or draw from their experience — just remember that your Unique Ability, skills, personality, and problem-solving preferences shaped your experience. What may have worked well for you may not work well for the people you lead.

#5: Be an Example

The Six Core Disciplines of Leading

In the previous sections, we focused on what leaders must do — create a Vision, allocate resources, and provide structure, each fully aligned with the organization’s Focus Filters.

The flip side of doing is being. But how must we **be** as leaders of our teams?

Before answering that question, let’s discuss why we must be a certain way as leaders. The simple answer is that team members don’t just follow us toward the Vision we create. Team members often mimic how we model leadership. If we want our followers to be a certain way, we must be that way ourselves.

- We must be **responsible** for our words, decisions, and actions. This means taking responsibility when things go well and also when they don’t. It means following through with our commitments and taking responsibility for our impact.
- We must be **centered** in our ways of being. Extreme words and actions lead to extreme reactions from our team members, peers, and leaders. Extreme reactions lead to consequences that are hard to predict, control, and unwind. Staying centered helps set the tone for handling whatever hardships come our way.
- We must be **thoughtful** in our decisions, words, and actions. It’s easy to let impulse or habit drive us. It takes discipline to precede those decisions, words, and actions with careful thought.
- We must be **clear** in our statements. This requires thoughtfulness and the willingness to commit. Underneath that, it requires effort to be clear and courage to be specific.
- We must **focus** on our goals and commitments and avoid being distracted or sidetracked.
- We must continuously **develop the competencies** required to fulfill our R&Rs. Being competent is not a static phenomenon. It’s a continuous process of improvement.
- We must stay **disciplined** in our effort to be responsible, centered, thoughtful, clear, focused, and competent day by day and week by week.
- Finally, we must stay **confident** in overcoming obstacles, breaking through barriers, and dealing successfully with setbacks.

#6: Be Open, Honest, and Transparent

The Six Core Disciplines of Leading

We believe leaders should adopt a stance of openness, honesty, and transparency with their teams. These are some of the essential characteristics associated with trust. Our experience as coaches and entrepreneurs has shown a strong correlation between these three attributes in leaders and success in achieving goals.

- **Open** — Leaders need to be open to external input in the form of criticism, feedforward, corrections, coaching, and compliments. We don't always have to agree with or adopt the input we get. We do need to hear it, be thoughtful about it, evaluate its validity, and apply any valid points.
- **Honest** — Leaders need to be truthful. We must be authentic, reducing the distance between how we express ourselves and what we think. This doesn't mean sharing any and every thought or opinion. It's okay to say, "I can't address this topic right now."
- **Transparent** — Leaders must allow their plans, purpose, and intentions to be visible from the outside. None of our statements or actions should be surprising to our followers.



RECAP: LEADING

Leaders must have a compelling Vision of where the team is going that is entirely consistent with the organization's Focus Filters. To turn that Vision into reality, leaders must provide the necessary resources while focusing on who does what, not how they do it. Finally, leaders must act as examples to all team members by being open, honest, and transparent in their interactions.

The Six Core Disciplines of Coaching

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THE SIX CORE DISCIPLINES OF COACHING

- 1. Turn Expectations into Agreements**
- 2. Communicate Effectively**
- 3. Meet at the Right Cadence**
- 4. Put People First**
- 5. Grow Together**
- 6. Appreciate Each Other**

#1: Turn Expectations into Agreements

The Six Core Disciplines of Coaching

It's human nature to construct **expectations** of what needs to be done, how people should act, and so on. It's also human nature to construct strong beliefs that something will happen or be the case in the future.

Creating expectations is a unilateral act — one party expects something of themselves or someone else. As a coach to each member of your team, you should turn unilateral expectations into bilateral **agreements**. The coach and the team member must agree on what must happen or must be the case in the future.

Turning expectations into agreements fosters the kind of culture often found in High-Trust Companies.

Any agreement between a coach and team member has three components:

1. **Clarity** — Agreements must be crystal clear. Don't rely on assumptions. Explicit agreements require you and the other person to be on the same page about what matters, why it matters, and what the agreement is.
2. **Honoring** — Once established, we must all honor agreements. There are several types of agreements:
 - » **Roles and Responsibilities** — What everyone is responsible for and what their roles are. We clarify and document the five to seven most important R&Rs in the Responsibilities Chart. Any person in that Seat takes on and owns these.
 - » **Rocks** — The top priorities that focus our work over the next 90 days. One person owns the Rock. While they can assign team members to Milestones for the Rock, only the owner can determine if the Rock was completed.
 - » **Core Values** — The essential attributes and behaviors of our team members. The genuine connections in an organizational culture with shared values unite team members toward common goals.
 - » **KPIs and Targets** — The essential metrics used to evaluate our performance. Each KPI has an associated target which we agree helps us see if there's an issue.
3. **Issues** — Occasionally, we'll encounter difficulties, obstacles, and challenges when honoring agreements. We'll also encounter new opportunities and new ideas. The final component of any agreement is that we agree to bring [Issues](#) to the surface, gain clarity, and address them.

#2: Communicate Effectively

The Six Core Disciplines of Coaching

“The single biggest problem with communication is the illusion that it has taken place.” — George Bernard Shaw

Effective communication between the coach and team members is essential for any agreement to be clear enough to be honored. **Effective communication** is communication that has the intended or desired effect.

Three fundamental things must occur for effective communication:

1. **Understanding** — We must gain insight into how others may receive our communication with an awareness of our style, patterns of communication, and context. Gaining this level of understanding requires time, exploration, and curiosity about how people operate. We can expedite this process by using [preference assessments](#) that reveal a person’s tendencies, such as their problem-solving and communication styles or their motivators and drivers. Consider the person’s needs and desires and how they instinctively act. At Ninety, we use Kolbe, PRINT, and TypeCoach.
2. **Best Interest** — Effective communication also requires that both parties trust each other’s intentions. To build this type of trust, we must set our egos aside and communicate as if we’re in the other person’s world rather than our own.
3. **Hard Conversations** — Effective conversations occasionally have an emotional impact. Such conversations are often called “hard” or “difficult.” To become great coaches, we learn to embrace rather than avoid [hard conversations](#). Here are a few guiding principles:
 - » **Be Truthful.** Do everything in your power to reflect factual truth. Nothing erodes trust faster than being disingenuous. Our team members should trust that we respect them enough to be honest.
 - » **Be Specific.** If you have a concern or bad news to share, avoid generalities. Instead, use examples, be concrete, and focus on the facts.
 - » **Be Positive.** Be constructive rather than destructive. Adopt a problem-solving mindset. Engage in constructing a solution rather than over-emphasizing the other person’s past actions.
 - » **Be Realistic.** Have specific and realistic goals in mind. One conversation may not be enough; think of coaching as more of a marathon than a sprint.
 - » **Care.** As Teddy Roosevelt once observed, “No one cares how much you know until they know how much you care.” Aim to see the human beyond their R&Rs.

#3: Meet at the Right Cadence

The Six Core Disciplines of Coaching

Great coaches meet with their people as a team and individually. Without a deliberate cadence, meetings often become counterproductive. Meeting cadence refers to how often we hold meetings and how long they last.

TEAM MEETINGS

Meeting too often or not enough with your team can sabotage your success, reduce the team's sense of accountability and trust, and hinder decision-making ability. We use a regular cadence.

Weekly — Every team should meet weekly to review KPIs, track agreements, solve issues, and enhance the team's health. Learn more from our [On Weekly Team Meetings Guide](#).

Quarterly and Annual — Every team should hold quarterly meetings to examine their performance during the past 90 days, plan for the next 90 days with new KPIs and Rocks, review the team's long-term Vision and plan, and enhance team health.

Once a year, an [Annual Planning Meeting](#) (APM) replaces the [Quarterly Planning Meeting](#) (QPM). During APMs, the team sets new 1-Year Goals and updates the Vision.

1-ON-1 MEETINGS

Coaches must hold [1-on-1 meetings](#) with each team member. Cadence is key — too often feels like micromanagement, while too seldom leads to disconnect and team members feeling unsupported. We recommend the following cadence.

Weekly — When things are new, challenging, or changing, hold weekly meetings with each team member.

- **New** — During the 90-day onboarding period of any new team member, weekly 1-on-1s provide additional support and tools as the person settles into their new role.
- **Challenging** — When someone needs additional support because they're going through challenging times, short-term weekly 1-on-1 meeting help that team member through it.
- **Changing** — When organizations, departments, or teams undergo rapid changes that could be unsettling or confusing to some team members, the coach can better support team members during the transition through weekly 1-on-1s.

Quarterly — At Ninety, we use the [1-on-1 tool](#) to hold Quarterly Discussions, replacing conventional once-a-year performance reviews with a quarterly meeting cadence. During the 90-day onboarding process, we recommend holding these meetings monthly. Quarterly Discussions focus on:

- The person's cultural fit with the company and the team.
- How well they're doing at each of their R&Rs through the filters of Competency, Commitment, and Capacity (CCC).
- The results they've produced over the past quarter.
- How well we're doing as their leader and coach.
- What we can do to help them make their desired career progress.

#4: Put People First

The Six Core Disciplines of Coaching

One of our core beliefs is that the purpose of life is to make life better — we have a **need for growth**. Another of our core beliefs is that everyone wants to genuinely **feel they matter**. We recommend creating a pro-growth environment where the coach talks with each team member about how they're doing and growing. These conversations take place during our Quarterly Discussions.

Without regular checkpoints, you'll never know whether you're fulfilling these needs for each team member, including yourself.

At Ninety, we're replacing feedback with **feedforward**, an approach that doesn't look back in criticism but instead looks forward with solutions. When giving feedforward, we gently suggest specific ways a team member can improve on their execution of a task in the future rather than state what they've done incorrectly in the past.

In pop culture, bad bosses are either too nice or too mean. Think of Michael Scott's "Let's be best friends" talk in *The Office* or the insensitive comments of Mr. Burns in *The Simpsons*. Good feedforward avoids both pitfalls, with positive messages delivered sincerely and constructive comments shared with care. Like any skill, giving useful feedforward requires practice and comes more easily with positive modeling from others. With time, we learn how to strike the right balance between honesty and compassion and give feedforward that makes a difference.

Ninety customers who embrace our [1-on-1 tool](#) tend to stick with the platform long-term. Why? Because the 1-on-1 tool exemplifies the best qualities and cross-functional capabilities an integrated

[Business Operating System](#) offers. The tool puts into practice time-tested concepts and disciplines that dramatically elevate an organization's ability to focus, align, and thrive.

Quarterly Discussions include data-centered conversations about what's working, what's not working as well as it should be, and what solutions could lead to improvement. We learn how we're doing as leaders and coaches, and we get an update on our team members' level of satisfaction with their careers and progression.

In short, we dramatically increase retention and develop talent by covering culture, Right Seat, performance, career aspirations, and our role as leaders and coaches.

CULTURAL FIT

When the team member and their leader believe that the organization's Core Values are being consistently embraced and displayed, we refer to the team member as a "cultural fit." As management consultant Peter Drucker is famous for observing, "Culture eats strategy for breakfast."

In the final stages of the hiring process, we value a prospect with better cultural fit more than one with slightly more experience. Team members who fit our culture are long-term wins for the organization, allowing us to reach our goals and bring our Vision to life. Quarterly Discussions are a great opportunity to reinforce our culture and Core Values with team members.

RIGHT SEAT

To thrive in a Seat, a team member must be competent in the five to seven R&Rs of the Seat, be committed to mastering them, and have the capacity to fulfill the associated requirements consistently. In addition to Cultural Fit, we hire, fire, review, and reward based on a team member's **Competency, Commitment, and Capacity (CCC)** for their Seat.

Competency is the easiest to define of the three dimensions. Competency relates to our skills and experiences. Our knowledge of the area of our work. Competent people understand the nature of the work and how to do it well. Questions to explore include:

- Do you know what you need to know to fulfill the Roles and Responsibilities of your Seat?
- What training, learning, practice, or experiences do you need to succeed in this Seat?

Commitment relates to our interest level in doing the work and embracing all its ups and downs. While competency is about facts, Commitment is about energy. Questions to explore include:

- Are you doing this work simply because you've been told to, or because you truly enjoy and want to do this work?
- Are you genuinely energized by your work and want to become better and better at it?
- Are you committed to not just being good or great at your work but also seeking mastery so you can teach others how to do it as well?

Capacity relates to whether we have the innate ability to perform a task based on our physical, intellectual, emotional, and time capacities. Capacity is something that is inherent and unique to each of us. The main difference between Capacity and Competency is that Capacity requires ability, and Competency requires effort, coaching, time, repetition, skills, and talent.

If there are any doubts concerning capacity, ask the team member to assess their capacity status from 0% to 100% or above.

RATING YOUR CAPACITY	
Less than 80%	You're in the Comfort Zone. You're likely underutilized, lowering commitment, engagement, and job satisfaction.
80–90%	You're in the Stretch Zone. This is ideal and often leads to expansion, learning, growth, and fulfillment.
90–100%	You're in the Danger Zone. You can likely manage this for a short period, but we recommend prioritizing finding areas to delegate.
Greater than 100%	You're in the Breakdown Zone. You're heading for a breakdown at this pace. Coaches need to address this as soon as possible.

PERFORMANCE

This is about how well our team members performed over the prior quarter. We focus on three specific areas:

- **KPIs** — How well the individual hit the agreed targets of their KPIs. This is about consistently performing at a level that makes it easy for us to get out of their way and let them run.
- **Rocks** — Every leader must own at least one or more Rocks per quarter. Individual contributors should also get learning and skill-development Rocks. Here we review how they did in terms of completing these agreements. If there was a miss, we talk about what we could have done differently and the implications going forward.
- **To-Dos** — These are almost always an agreement with someone who's depending on them to complete their To-Dos.

Great coaches care about the person in front of them, but even more, the person they can become.

CAREER ASPIRATIONS

Our team members need to know their coach cares about them and their career progression. They need to know that their coach genuinely wants them to feel they're thriving in their Seats. They need to feel that their R&Rs align with their career aspirations.

We recommend asking your team members:

- Where do you see yourself in three to five years?
- What skills do you want to develop?
- How can we help you develop those skills?
- What are you going to do to develop them?

As the coach, it's also your responsibility to map the team member's career aspirations with the team or organizational growth plans to determine whether the company can accommodate them.

OUR ROLE

We end the conversation with our team member's feedback on how we're doing as their team's leader and coach. They rate how we're doing across a great leader's six core disciplines and a great coach's six core disciplines.

#5: Grow Together

The Six Core Disciplines of Coaching

We passionately believe that every single team member must experience growth. Without growth, a team member's job satisfaction will likely plateau or decrease. We innately desire to grow our minds, goals, and how we matter. When growth opportunities are not present, we stagnate.

To grow, we must adopt a **growth mindset**. By mindset, we mean a person's beliefs that filter and color how they interpret the world.

A **fixed mindset** assumes one's capabilities are fixed, immutable, and unchangeable.

- » "Either I'm good at something, or I'm not."
- » "My abilities are unchanging."
- » "My potential is predetermined."
- » "When I'm frustrated, I give up."
- » "I stick to what I know."

A **growth mindset** assumes that one's capabilities are expandable, changeable, and subject to growth.

- » "Failure is an opportunity to grow."
- » "My effort and attitude determine my abilities."
- » "I'm inspired by the success of others."
- » "Feedforward is constructive."
- » "I can learn to do anything I want."

We recommend one of the first major tasks a coach undertakes is helping team members adopt a growth mindset about their professional work. Each person may be at a different level in that journey.

Getting to know your team members personally and professionally, quarter by quarter, will give you a good idea of their beliefs. Coaching them toward a growth mindset could involve identifying areas where they've developed, investing in their professional development, and providing new opportunities.

Referencing their behavioral preference assessments can provide additional insight into their needs. With this information, you can assist them on their professional journey.



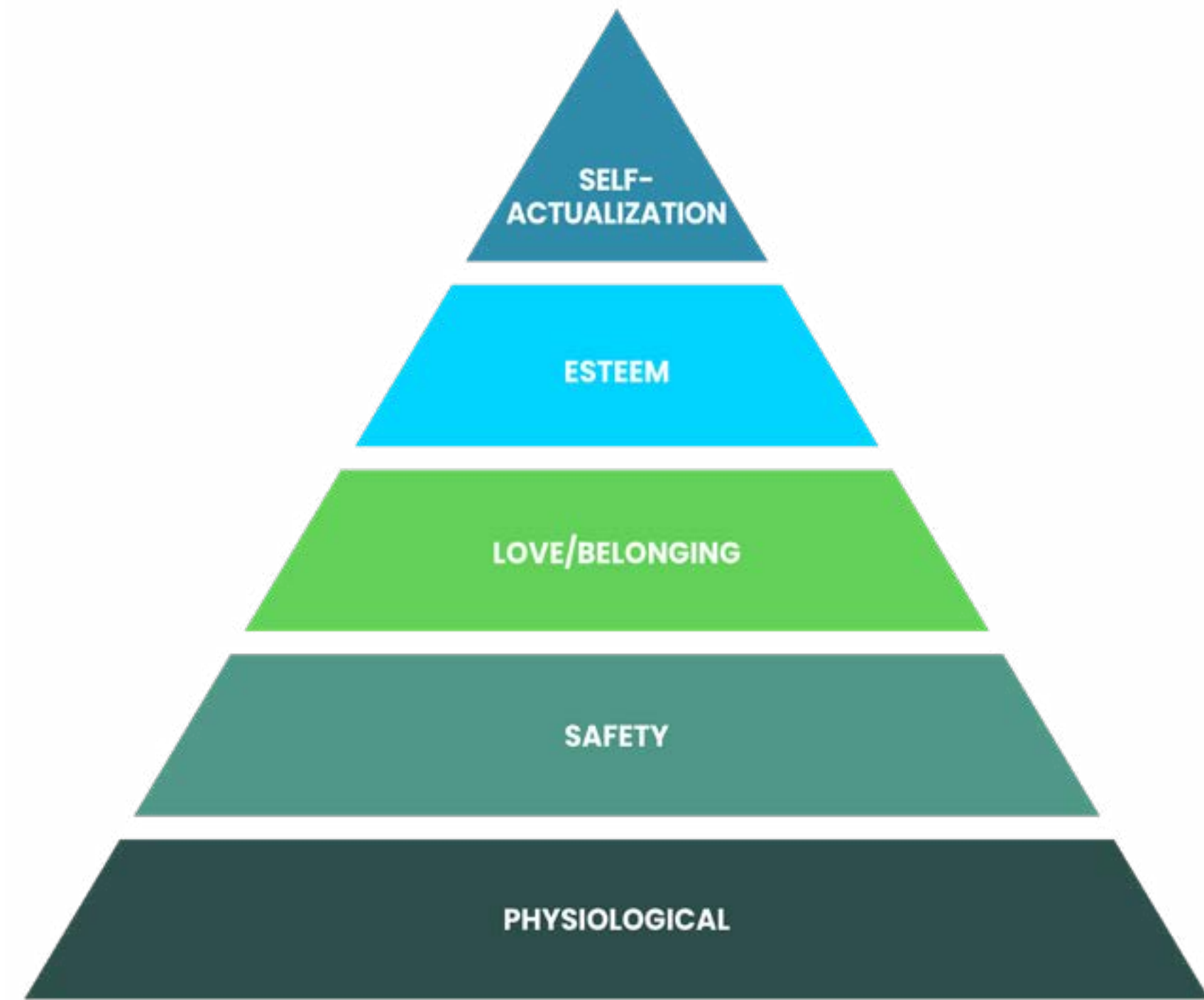
#6: Appreciate Each Other

The Six Core Disciplines of Coaching

In Maslow's Hierarchy of Needs, the top two tiers are Esteem (the need for self-esteem, recognition, and freedom) and Self-Actualization (the need to feel fulfilled). Coaches must recognize the effort and creativity of their team members and encourage them to find work that fulfills them — Work with a capital W. Through an honest appreciation of each other's values, time, and abilities, we allow trust to take root at the heart of our relationships.

Society now has a neuroscience-based understanding of trust, how we earn it, and how we keep it. We know that people trust leaders who care about them. According to a study on employee experience by [Qualtrics](#), "Team members who regularly hear from leadership that their work is appreciated are five times more likely to remain in their job than those who don't." Five times!

Many business leaders believe that paying people more is the best way to show appreciation. While fair pay is important, a [Harvard Business Review](#) study found that pay makes up less than 13% of workplace satisfaction for people who earn under \$40k per year, and even less for people who make over \$120k per year.





#6: Appreciate Each Other

continued

HOW DO YOU SHOW APPRECIATION?

Showing appreciation can't be a spontaneous, reactive act. We must create a purposeful and mindful context for showing appreciation. This act must be visible to all other team members so that each act increases the collective trust team members have with each other. Here are a few methods we use:

- **Core Values Shoutouts** — Recognize individuals for their contributions that reflect one or more of our Core Values. We do this almost daily over Slack, during our “All Hands” meetings every couple of weeks, and quarterly during our State of the Company meetings.
- **Celebrate Accomplishments** — During our Weekly Team Meetings, we celebrate collective and individual accomplishments.
- **Reward Exceptional Work** — We reward extraordinary work with gifts like extra time off, gift certificates, and recognition.
- **Reward Growth Opportunities** — We reward performance, contribution, and commitment to self-development with a yearly stipend for professional development.

Appreciation goes beyond these acts. As coaches, we commit to:

- Provide feedforward to every team member regularly.
- Explicitly encourage each team member to appreciate other team members' functions and commitments.
- Ensure we monitor market compensation levels proactively and follow clear policies about how and when we will meet them.

RECAP: COACHING

Being a coach to your team involves helping each team member fulfill their potential. Through agreements, proper communication, and effective meetings, your team has the structure to bring about the results needed to accomplish its goals. By putting people first, focusing on growth, and actively appreciating your team members, you show that their efforts to benefit the organization are reciprocated in their personal and professional lives.

Agreements

We've covered what it takes to become a world-class leader and coach of a team, starting with the Senior Leadership Team and continuing to every single team within an organization.

What about agreements? Why are they placed at the intersection between leadership and coaching?

Agreements go beyond expectations or micromanagement for our team members. Agreements link commitments to individuals. Our extensive experience shows that establishing clear, compelling, and well-communicated agreements across the entire team significantly enhances team health, performance, and job satisfaction.

Six specific agreements form the foundation of your success in leading and coaching a team:

1. **Where** we're going – Compelling and Audacious Goals (CAGs).
2. **When** we're getting from here to there – 3-Year Goals, 1-Year Goals, and Quarterly Rocks.
3. **How** we'll know we're progressing toward getting there – KPIs.
4. **Who** and **What** will be an immediate step on this journey – To-Dos.
5. **What** are the obstacles, challenges, opportunities, and ideas we need to solve on the way – Issues.
6. **Who** we are as a group – Core Values and Culture.

Establishing clear and compelling agreements significantly enhances team health, performance, and job satisfaction.

Takeaway

To lead a team in the 21st century is also to coach the individuals of that team to bring out their potential. Leaders set the Vision in motion by determining an organization's long-term objectives. On the way to accomplishing goals, leaders turn expectations into agreements and provide ongoing coaching to their team members. The Lead, Agree, Coach framework puts humanity at the heart of what we do by prioritizing high-trust relationships.



Key Terms

- **Agree** — The terms that leaders and team members enter into. Forming agreements goes beyond setting expectations to provide accountability, transparency, and results.
- **Coach** — To be a coach is to work with and for each person on a team. Coaches provide tools, inspiration, and wisdom for growth.
- **Compelling and Audacious Goals** — A long-term goal so challenging and seemingly unattainable that it requires companies to focus and align to accomplish.
- **Focus Filters** — The essential elements of a simple but complete company Vision: Core Values, Purpose/Passion/Just Cause, Marketing Strategy, and Goals.
- **Lead** — The responsibility of a company's leaders to be strong, confident, and effective to enable their team(s) to live up to their agreements.
- **Lead, Agree, Coach** — The philosophy of leadership that states that anyone who heads a team must use agreements to align the team, be a leader for the team, and be a coach to each person on the team.
- **SWOT Analysis** — An examination to assist company planning by developing a strategic framework based on the assessment of your company's strengths, weaknesses, opportunities, and threats.
- **Vision** — A company's definition of itself and the expression of its highest aims. It defines how the company's people work to make their highest aspirations a reality. Our Vision tool captures and displays an organization's Core Values, long-term goals, marketing strategy, and so much more.



WHAT'S NEXT?

Thank you for taking the time to explore this guide. Now that you have a sense of how these concepts and their related tools advance a company's Vision, you may be eager to implement them in your own organization. We're here to help! Find more company-building information in the [90u Library](#) or [try Ninety today](#).