Conducting an E3 Review Guide

This guide is designed to help you effectively prepare for and conduct an E3 review. The steps are structured to guide you through the process, from preparation to in-depth analysis, ensuring you provide a comprehensive and insightful review to your employees and clients.

Step 1: Preparing for a Session

Objectives

- Understand the importance of preparation for an E3 review session.
- Learn how to gather and analyze data before the session.

Steps

1. **Invite to take the E3**
    - As you prepare for your coaching session, you will need to introduce your employee to Behavioral Essentials and ask them to complete the E3 Behavioral Assessment.
    - To ensure that you're equipped with the information you need, we've created two different email templates that you can use to give your client/employee more insight into BE and/or the E3. Both templates can be found in the Resource Library at learn.behavioralessentials.com.
2. **Confirm Completion of the E3**
    - At least a few days before the E3 Review session, confirm that the individual has completed the E3.
3. **Download the Line Chart & Coaching Report**
    - To prevent any internet mishaps, download the Line Chart & Coaching Report as PDFs for easy reference during the review session.
4. **Review the Data**
    - Review the individual's Line Chart & Coaching Report at least a day before the session.
    - Look for a high S-Cr score. Because High Self-Critical Scorers tend to critically assess their behaviors, this bias may impact the accuracy of their assessment results which requires a different approach during the E3 review. If a person has a high S-Cr score, you will only focus on this scale during your E3 review session to gain a more comprehensive understanding of the individual.
        - See below in the Additional Approaches section for detailed steps on how to conduct an E3 review for a high S-Cr scorer.
    - Consider the individual's journey, including what they have signed up for and their future experiences. Will they go through a team experience after this? What led them to this and where are they going from here?
    - Consider the data of the individual and how it might affect your approach when communicating with them. Ask yourself, what does this person value? What communication style would allow for quicker rapport building?

Step 2: Introductions & Connection

Objectives

- Learn how to build rapport and gather relevant background information from the individual.
- Differentiate the E3 assessment from other personality or behavioral assessments.

Steps

1. **Initial Questions**
    - Have you ever taken a behavioral assessment before? What's your experience with assessments? Use this opportunity to differentiate the E3 from other assessments they are familiar with.
    - What prompted you to take the E3?
    - How well do you know BE and the E3?
2. **Forming a Connection**
    - Ask about their background: Tell me about you, what do you do?
3. **Session Setup**
    - Avoid sharing your screen for the first 5 minutes to focus on the conversation.
    - Use a deck to frame the session and provide structure. Utilize their answers from the initial questions to find your starting point.

Step 3: Reviewing the Line Chart

Objectives

- Provide a detailed review of the Line Chart, using the Coaching Report as a supporting guide.
- Help the individual identify key behavioral traits and understand their impact.

Steps:

1. **Before Reviewing the Line Chart**
    - Before showing the Line Chart, explain that they'll see a squiggly line and 21 different percentages, along with different abbreviations for 21 behavioral scales.
    - Explain that high scores aren't good, and low scores aren't bad; all scores are neutral

Awareness Checks: During the review, be aware of how the person is responding, their body language, facial expression etc. to gauge what you may need to spend more or less time on.

2. Orientation to the Line Chart

- X-axis- Left number orientation
    - These are the percentage scores
- Y-axis- Bottom scale abbreviations orientation
    - These are the abbreviations for the 21 behavioral scales
- 3 sections: 0-30 (low), 30-70 (moderate-“it depends, more flexible”), 70-100 (high)
- Explain that the behavioral scale scores that are either closest to zero or closest to 100 are most indicative of their core psychology, values, and motivators. These are their strongest behavioral traits.
- Reemphasize that all scores are neutral- no good or bad scores
- Explain that there will be some parts that they agree with and some that they disagree with and that’s okay.

3. Key Behavioral Traits

- Now that you’ve oriented them to the Line Chart, ask the individual to identify their top behavioral trait.
- Review 2-3 of their key behavioral traits
    - Use the Coaching Report to quickly reference their key behavioral traits and help guide discussion.
        - Reminder: The Coaching Report provides an individual’s Key Behavioral Traits, Potential Insights, Growth Recommendations, and Tools. These traits are the behavioral scales that someone scored either closest to zero or closest to 100 on The Line Chart, and are most indicative of their core psychology, values and motivators.
    - Give examples of how that scale might show up, or things that person might do to connect them to their results. The goal here is to get them laughing ,smiling and resonating with their results.
    - Ask them to reflect on the trait’s impact: How does this trait show up for you? How do you think other people experience it?
    - Illuminate both the gifts and challenges in their key behavioral traits. In both high and low scores, there are always gifts and challenges.
    - Encourage the client to talk more and adapt your style to their traits.
    - Advanced Insights: As you become more experienced, you can begin to make connections between different scales.

4. Commitment to Growth

- Identify one scale they want to focus on and ask for a commitment to growth. Ask them: “What is one behavioral shift you can commit to that would make the most positive shift in your world?”
    - Continue to talk through an actual plan of implementation and start date for the shift. For example, “What does this commitment look like or sound like for you? What resources are needed to support you with this commitment? What is one step you can take towards making progress with this commitment? How soon can you get started?”
- At the end of your session, provide the Coaching Report as the person’s quick go-to guide for growth.

Additional Approaches

Objectives

- Learn various approaches to focus the review session based on the individual's needs.

Approaches

1. High S-Cr E3 Review

It's important to be aware that High Self-Critical Scorers tend to critically assess their behaviors, often downplaying their strengths and magnifying perceived weaknesses. This bias may impact the accuracy of their assessment results, making them less reflective of how this person actually behaves. Because of this, you should only focus on explaining the S-Cr score during an initial E3 review session if someone scores high in S-Cr.

Use the language below and in the Coaching Report to guide discussion about Self-Critical and how it can affect self-perception.

"It's important to understand that your tendencies towards self-criticism play a significant role in shaping the results of your behavioral assessment. As a high scorer in Self-Critical, your natural inclination toward self-criticism has greatly influenced how you perceive yourself. Simply put, when it comes to selecting words that describe you, you may not give yourself credit where credit is due. Consequently, this emphasis on self-critique has impacted the accuracy of your assessment results, making them less reflective of who you actually are.

Please remember that a high score in Self-Critical does not define your achievements, capabilities, or potential for growth. However, in order to develop a more authentic understanding of yourself, the first step involves recognizing this behavioral trait and working with a trusted coach to help you reframe your strengths and growth areas. By doing so, you'll have the opportunity to view yourself in a more positive light, leading to a level of self-awareness that is healthier and more balanced."

Here are a few best practices for conducting a High S-Cr E3 Review:

- Adopt a Gentle Approach
    - Adopt a gentler, softer approach to discuss the results.
    - Be mindful of the client's body language and responses.
- Encourage the individual to identify a loved one/champion/friend/colleague who can help them retake the E3 with a more accurate view of their strengths
- Schedule a follow-up session to review their updated E3 to foster a more authentic understanding of their strengths.

By adopting this approach, the individual will have the opportunity to view themself in a more positive light, leading to a level of self-awareness that is healthier and more balanced. They will also have a more accurate Line Chart that you can use to guide further growth.

2. Zoomed In Approach

- Focus on one key trait that is contributing to performance issues, conflict with team members, etc.

- This approach requires a deeper understanding of the individual's performance and work experience, making it particularly valuable for managers to enhance ongoing development discussions.

3. Zoomed Out Approaches

- Focus on a Group of Scales
  - Provide an overview of the group of scales, along with a high and low overview of each of the scales within the group and how they show up for the individual.
- Advanced Approach: Comparing/Contrasting Groups of Scales
  - Compare and contrast two groups of scales, such as work vs. relationships, to identify potential conflicts or complementary traits.
  - This approach requires more advanced knowledge of the relationships of scales.

By following these steps and additional approaches, you will be well-equipped to conduct thorough and insightful E3 reviews. Remember, the goal is to help your employees and clients better understand themselves and empower them to use this knowledge to grow themselves and others. Good luck!