Using the Comparison Report to Facilitate Group Sessions

The Comparison Report offers an opportunity to overlay and compare up to 10 people's line chart data at once. It can be a very helpful tool to show small groups how they compare and contrast on key behavioral traits.

The Comparison Report can be used to highlight and facilitate discussion around key strengths as well as potential areas of conflict within a group. This can then be used to foster greater understanding of team dynamics and how each individual can impact the group as well as how to then build a more cohesive, efficient team.

Note: Before anyone can participate in a group session, they must have first had a 1:1 E3 review of their individual data.

How to Generate the Comparison Report:

1. In the BE Platform, select up to 10 individuals whom you wish to compare.
2. Scroll to the bottom of the screen and select the compare button.
3. This will then generate the combined line chart for all selected individuals.

Using the Comparison Report in a Group Setting

This document offers a framework for preparing, facilitating, and concluding group sessions.

Preparing for the Session

Make your comparison report the day before and save it as a PDF. Decide ahead of time, in collaboration with the group leader, whether you will choose to share it for everyone to have their own copy.

Check in with the group leader beforehand. Ask them to prepare a brief "why we are here" introduction. Within this introduction, be sure to include an overview of desired outcomes from the group's time together. This will help to set appropriate expectations for the discussion.

Consider establishing some "ground rules" for the group, emphasizing that this conversation is meant to provide a forum to build greater understanding around strengths and challenges. Encourage everyone to participate with curiosity and kindness and to have an open mind with regard to those who might offer different perspectives.

In addition, as the facilitator, remind yourself of the importance of exhibiting leadership and set a tone that includes: gentleness, patience, sense of humor and curiosity.

Allocate ample time for preparation to familiarize yourself with the data. Consider how the data might affect the session, i.e. the pace/tempo of your delivery. Also consider in advance such things as whether this is a very critical group, what they might want to know, and what potential areas might be that might hinder their success. For example, a highly social and low-critical group may not be inclined to ask challenging questions or provide critical feedback about their behaviors.

Review your notes and clear your mind before the session. Utilize a tool to help you get present and relaxed. Be where your feet are. Put away any distractions. Focus on intention and connection.

Set the stage at the beginning of the session:

- Be prepared to guide the conversation and let them be active participants.
- Remember V-A-K-T (visual, auditory, kinesthetic, tactile)
  - Consider trying to structure your session in a way that supports different types of learners; incorporating more sensory modalities into the session will deepen engagement, learning and collaboration among participants.
  - Therapeutic Rapport: Focus on your intention of building connection with the audience. Don't discount the importance of this: therapeutic rapport accounts for 50% of the success of your session.
- Remember the 55 – 38 – 7 rule: A study by Dr. Albert Mehrabian showed that how you show up has the greatest influence on how your message will be received. 55% of your communication is influenced by your physiology; 38% is influenced by your tonality (i.e. the attitude or how you articulate your message); and only 7% is the actual words you speak.

Suggested Agenda (this might take place over one or several sessions):

1. Introduction:
   a. Why we are here
   b. Desired outcomes
2. What you can expect from the session
3. Reorientation to the E3
4. Understanding the Comparison Report
5. Facilitated Discussion
6. Create a Plan (if appropriate)
7. Next Steps & Conclusion

1. Introduction

Have the group leader begin the session, beginning with the purpose, anticipated outcomes and what participants can expect. Have the group leader introduce the facilitator, conveying a positive tone and confidence in the facilitator as the "right" person to lead the session. Taking the time to frame the session is vital for establishing rapport and creating psychological safety. Session then shifts to facilitator.

Facilitator to include an overview of expectations and ground rules.

Best Practices:

- Remember, you are the GPS, and they are the drivers! Be present. Be curious. Ask the question and then LISTEN.
- Maintain a sense of authority and control throughout. Keep the group focused on getting to the final destination.

2. Reorientation to the E3

Bring up a sample individual line chart; consider using the group leader's data, with their permission. Address any initial thoughts someone may have while looking at the report:

- Be familiar with E3 history.
- Retrain their eyes for the Line Chart. Remind participants that no assessment has ever been able to capture the complexity of a human being. There are likely going to be some parts that you disagree with and parts that you will agree with, that's okay and normal. If it's okay with you, let's focus on the parts that you agree with.
- Reiterate that high scores aren't necessarily good and low scores aren't necessarily bad. These behaviors show up differently depending on what section of the chart they appear on.
- These behavioral traits are some of what makes you, YOU, in this moment.

By starting with the E3, individuals are reminded of how to interpret the line chart. This sets the stage and focuses attention before moving on to the Comparison Report.

3. Understanding the E3 Comparison Report

- Today, we're going to focus on our strengths and perception gaps as a team.
- "What we are about to look at is a chart that will show multiple lines..."
- It's important for them to understand that it's good to have diversity in scores.
    - For example, sharing an analogy like cooking any recipe illustrates that it takes a blend of ingredients to craft a great dish- you wouldn't want 100% of just salt.
    - "Every healthy ecosystem has both diversity and complexity."
- Present the comparison report and give a few moments for them to visually take in the results. For a Comparison Report (Group Overlay), first invite participants to share what they notice. As a facilitator, have some notes prepared in advance that capture what you have noticed, particularly where the data:
    - Converges and Diverges
        - An analogy, such as a river narrowing or widening, can be helpful to illustrate this.
    - The highest highs of scores and the lowest lows of scores. Neither of which is good or bad, just observe.
    - Which scales have the most and least variation?
- Continue to orient them to the Comparison Report, highlighting the differences from the individual line chart:
    - Unlike the individual E3, the high, low, and moderate sections are not distinguished by white and blue.
    - The comparison report essentially involves duplicating the E3 by two (or the number of individuals being compared), resulting in overlapped lines. This is the moment to hover over the top lines where individual names are, causing the lines to become bold (function not available on PDF).
- Remind them that all other aspects of the comparison report stay the same as the E3 review, including the scale abbreviations and the numbers on the left.
- Let them know that although you may all score similarly, that doesn't mean there still won't be any resistance and/or conflict. Rather, it is a lack of understanding that creates perception gaps, not the gap itself.

- Show them there might also be differences, or gaps, in scales.
    - Remind them, "Greater understanding dissolves conflict". Where gaps in understanding exist, we want to begin discussions around how to "mind the gap."
    - In this way, we are focusing on understanding rather than making someone feel bad for where they scored on a specific trait.
- Be prepared to walk through each scale and expand on definitions, underlying needs, and drivers behind them. It can often be helpful to begin with those scales most impactful, which is Behaviors Toward Work. (Proactivity, Dominance, Endurance, and Order)
- Understand each scale in isolation and then have them understand how they are in relation to each other.
- Include the first four scales and any others requested. There's a video of Rick **https://vimeo.com/743687675/8da46cd7d8?share=copy discussing** three of the first four. These behaviors are highly relevant to the work environment. [See grouped scales document for more insights about the interplay between the scales].

4. Facilitated Discussion

Once participants feel comfortable with the Comparison Report, start to facilitate discussion to build understanding and begin to "mind the perception gaps" that might be showing up for this group.

- Weave in any essential themes the data is presenting. Is a group more likely to be passive? Experience conflict? What can they do about it? Get specific.
- Create a dialogue with the group. Finding the needs of the group, what challenges are currently being faced, and where conflict could potentially arise.
- After asking a question to the group, be sure to wait before you ask for volunteers. If no one volunteers, call on someone.
- Ask broad questions such as "What do you observe here?" Encourage them to identify trends.
    - Trends can be seen where the data converges or diverges.
- Use follow-up questions as needed. In other words, if the leading question doesn't seem to stimulate many answers or seems confusing for people, then the follow-up question may help get the conversation going again.
    - For example: Consider the group's mixed scores of Dominance.
        - What behaviors are likely going to be shown by the high scorers in team meetings?
        - What about low scorers?
        - What are some potential practices to consider for team meetings that will help mind the gaps that exist?
        - If they get stuck, give an example of a practice.

Best Practices:

- Call on people you identified as being more outgoing, someone you have a pre-existing relationship with, or the team lead. Utilize the data here.
- When someone asks a question, it's a good practice to reiterate it for the group. "The question that was asked was…"
- It can be tempting to see someone's behavior as a fixed description of who they are. For example, "This person is highly Proactive." Remember to separate a person from their behavior. A more correct way of wording this would be to say "This person is a high scorer in Proactivity."

5. Create a Plan

After you have taken some time to discuss the data and begun to identify where conflict and gaps are emerging, begin to shift the conversation into one around how to practically address and mitigate these conflicts and challenges going forward; namely how to "mind the gaps".

It is critical to do this collaboratively as a group. That way, the participants are likely to feel a greater sense of ownership over the strategies presented and as a result, they are more likely to actually implement them.

Focus on realistic, practical strategies that the group feels are not only a fit for them but that are also relatively easy to address. Initial "wins" will create buy-in and motivate the group to maintain an awareness of each other and better "mind the gaps".

6. Concluding the Session

- What questions do you have? What did you learn? What do I need to know?
- A good go-to for concluding a session is to share with the group the themes that you heard during the discussion and reviewing the objective of the session.
- Another option is to ask the participants to share a key learning or takeaway. This works well for small groups.
- If strategies were identified, synthesize those and encourage the group to begin putting them into practice and to have ongoing dialogue around how those strategies are working.
- Answer "What's Next?" for the group.

Best Practices:

- Take a minute to write down any notes you would want to remember before the next session and/or themes that arose in this conversation that would be good for future sessions

7. Next Steps & Conclusion