

Fearless YOU!

A Year of Courageous Conversations

Part 2: Responding (Not Reacting) to
Disappointment, Criticism or Rejection
July 17, 2018 Webinar

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Who are we?

- Organized to promote the professional development of women in the retirement plan industry
- Network of more than 1,800
 - Early-career, mid-career and senior-level
 - Recordkeepers, TPAs, DCIOs, broker-dealers, RIAs, ERISA attorneys, advisors and consultants

Why WiPN?

- Independent women's organization
 - We drive agenda and initiatives, with input and insight from our membership
- Networking, sharing, support
 - Growth from 5 to 13 Regional Chapters
 - Conference Events
- Follow us on LinkedIn!
 - www.linkedin.com/company/womeninpensionsnetwork/

Fearless YOU! 2018

A Year of Courageous Conversations

Part 1: Take It On

Part 2: Create Workplace Culture

Part 3: Thrive on Challenge

Part 4: Gratitude

Women In Pensions Network *Connect* Committee

- Andrea Masucci, Chair - Director of Retirement Plan Services, Hamilton Capital Management, Inc., Columbus, Ohio
- Ali Caffery, Associate Portfolio Manager, Envestnet, Inc. Chicago, IL
- Mickie Morley, Regional Sales Consultant, CUNA Mutual Retirement Solutions, Boston, MA
- Amanda Malone Klink, DCIO Intermediary Sales Consultant, T. Rowe Price, Parkville, MD



Only 6% of Fortune 500 CEOs are women- Why?

- Rockefeller Foundation CEO Pipeline Project 100x25 Goal: 100 women leading Fortune 500 companies by 2025.
 - 2017 Korn Ferry Institute study, “Women CEOs Speak,” analyzed 57 current and past women CEOs to identify qualities that drove them
 - Common traits, drivers and competencies look very similar to those of male counterparts.
 - What are the key traits that were identified?



From Korn Ferry: <https://engage.kornferry.com/womenceospeak>

Key Traits Identified

Part 1: Take It On

- Courage
- Risk-taking
- Resilience
- Taking on a Challenge
- Managing Ambiguity

*NOTE: Women need to take on **tough and unpredictable job assignments** to build leadership characteristics (Korn Ferry “Women CEOs Speak” 2017, page 30).*

Key Traits Identified

Part 2: Creating Workplace Culture

- Inspirational to Others
- Promoting Self Development

In 68% of the responses, the women said they were motivated by a sense of purpose, by the thought that the company could have a positive impact on its community, its employees, or the world around them.

Working to create a more positive culture was a primary way these women carried out purpose and mission of their companies from

- instilling operational discipline
- creating a culture of honesty and openness
- improving how fairly and equitably workers are treated

By having a grasp on their strengths and weaknesses and being unafraid to ask for feedback, most recognized how they came across and adapted to different audiences.

Today's Speaker: Debbie Lundberg

*Responding (NOT Reacting) to Disappointment,
Criticism or Rejection*

**Author, Life Coach, Business Leadership Coach &
Corporate Trainer**



Debbie Lundberg believes "how you present is how you are remembered"! As a 10-time published author, certified life coach, certified leadership coach, and certified image consultant who speaks, facilitates, trains and coaches nationally, Debbie has been recognized in the Tampa Bay Business Journal's Best in the Biz as a Top 10 Business-oriented Speaker for 5 years consecutively, and as a BusinessWoman of the Year Finalist.

Serving as a MacDill Air Force Base Honorary Commander, Past Chairwoman of the Centre Club Board of Governors, recent 6-year Greater Tampa Chamber of Commerce Board of Directors member, Miss America Scholarship Pageant Preliminary Judge, Leadership Tampa Alumnus, and University of Tampa Board of Fellows, Debbie captures a combination of automotive industry leadership with a Dale Carnegie Training background, followed by consulting for a national organization, prior to launching her Florida-based National firm in 2006.

Two steps to help you get the most out of your membership...

Follow WiPN on LinkedIn

This public page is available to both members and non-members. By following WiPN on LinkedIn, you will have professional development resources delivered directly into your newsfeed as we post content such as tips, presentations, articles, research, TED Talk links, etc. It will also bring you information on upcoming national events.

<https://www.linkedin.com/company/womeninpensionsnetwork/>

If you aren't a member, text to join "WiPN" to 31996.





Welcome to:

2018 Fearless YOU! ***A Year of Courageous Conversations***



Debbie Lundberg

MBA, Author, Certified Life Coach, Certified Leadership Coach, Certified Image Consultant

“Committed to applied knowledge, growth, fun & ROI.”

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Welcome to:

Create a Culture:

***Responding (Not Reacting) to
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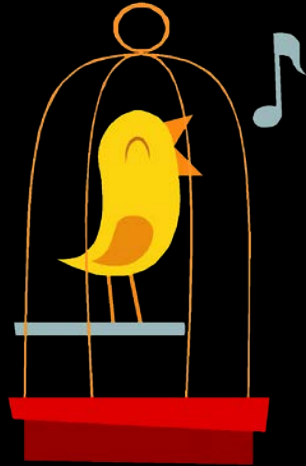






**Please wake me at 4:30 AM
For an important flight.**



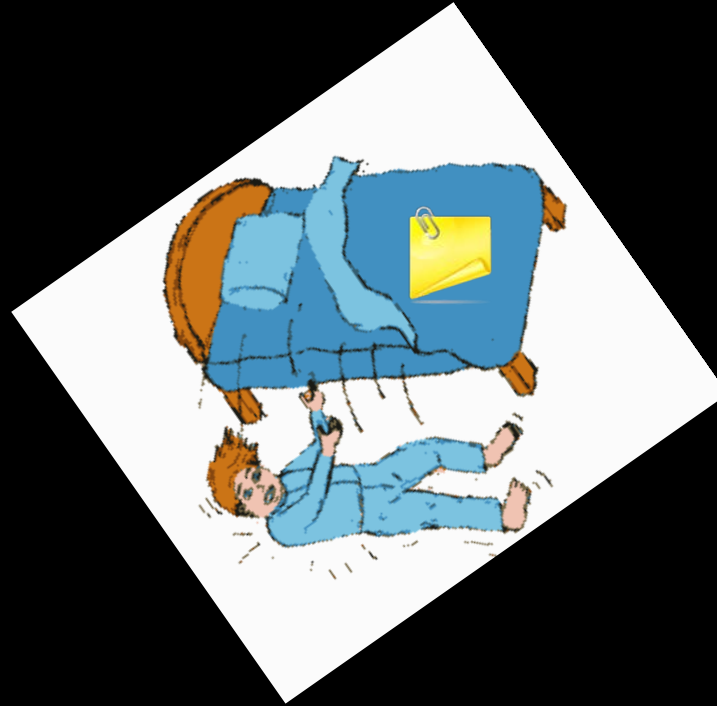








BREAKING THE SILENCE





It's 4:30 AM – please get up!





It's not about getting up, or who gets us up, though...

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It's not about getting up, or
who gets us up, though...
*it's about upping our
confidence in responding to
challenges, right?*

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That is as funny as I will be
for the entire webinar!!!

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BE FEARLESS
in the PURSUIT
OF WHAT SETS YOUR
SOUL ON FIRE

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Today's Goal

What we will do together today:

Share realistic &
inspirational ways to lead
as you respond to



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less-than-desirable



A Look Ahead

- 4 Reasons
- 4 Drivers
- Facing & Factoring In Fear & Feedback



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Responding (vs. Reacting)

The difference(s):

- Reacting is thoughtless, Responding is thought-filled
- Reacting is impulsive, Responding is wise
- Reacting means apologies, Responding means opportunities

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Agenda

- 4 Reasons
- 4 Drivers
- Facing & Factors & Feedback



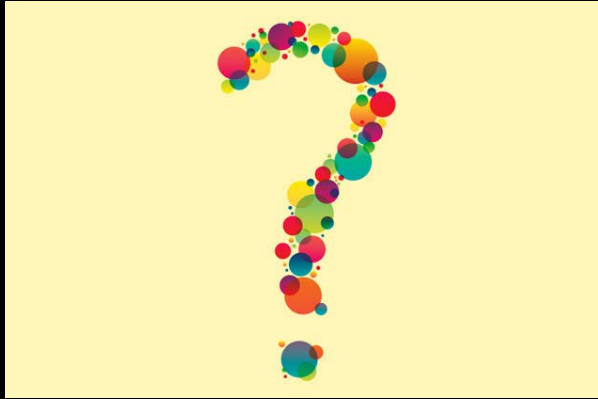
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***Ever had something not go
as you wanted it to do?***







4 Reasons

4 reasons for something not getting delivered/done by someone in our world:

- 1 - Don't know
- 2 - Don't know how
- 3 - Don't have capacity
- 4 - Don't want





Addressing 4 Reasons

- 1 - Don't know - provide information
- 2 - Don't know how - provide coaching
- 3 - Don't have capacity - assess fairly
- 4 - Don't want to - provide attitude ✓

(First of 4 ourselves)





Agenda

- 4 Reasons
- 4 Drivers
- Facing & Factors Hear & Feedback



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motivation





Ever assessed someone as lazy?



4 Drivers

4 drivers compelling individuals' thoughts, actions, words & outcomes.

- Time
- Money
- People
- Opportunity



Each impacts responses/reactions in some way!



4 Drivers

- **Time (more time or less time doing)**
- **Money (save more, spend less)**
- **People (around more/less, family/friends)**
- **Opportunity (pride, curiosity, experience)**



What is the order of your personal drivers?



4 Drivers

What are your top 2?

- Time
- Money
- People
- Opportunity



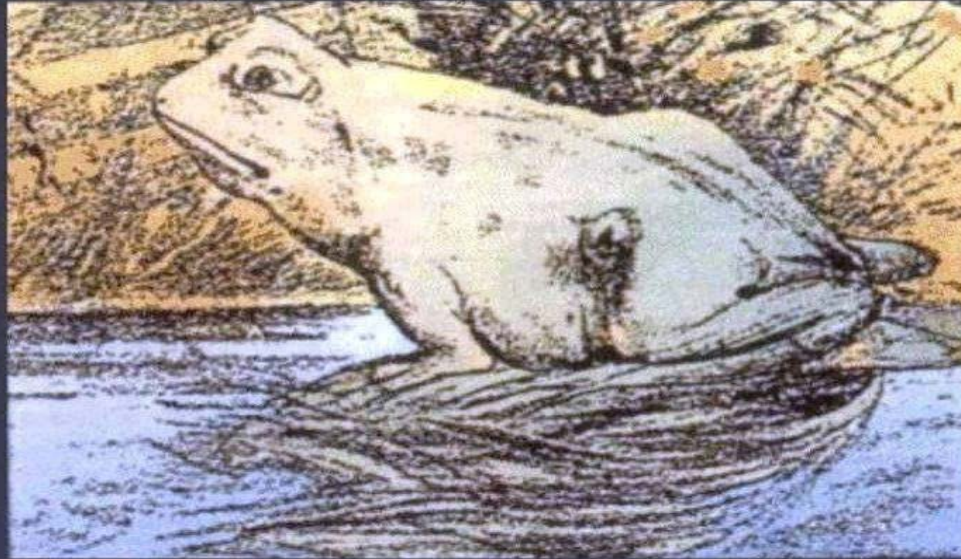


4 Drivers

Are you considering others' drivers, or just your own, when you hear, listen, process & respond?



What Do You See?



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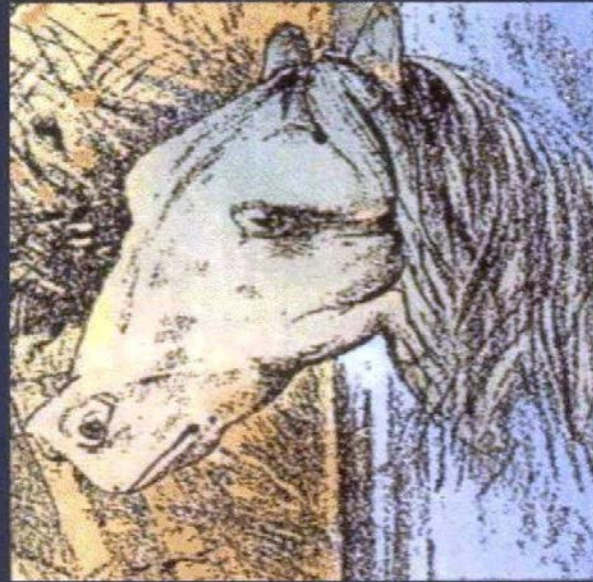
What Do You See?



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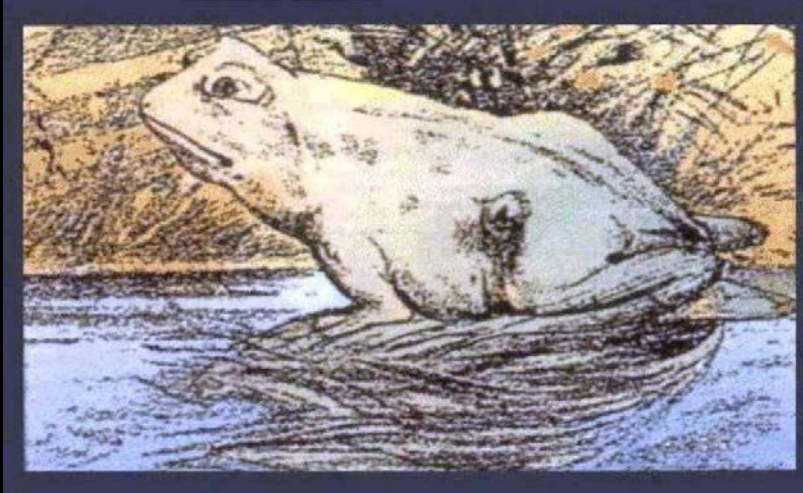


What Do You See?

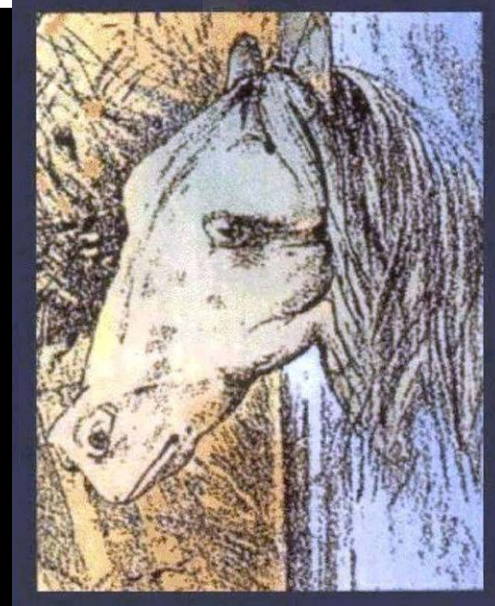


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A Lot About Perspective, Isn't It?



Frog



Horse

Based on the copyrighted writings/presentations of



When we keep perspective in mind, we remember two people can both be right at the same time with different ideas and differing views...

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Agenda

- 4 Reasons

- 4 Drivers

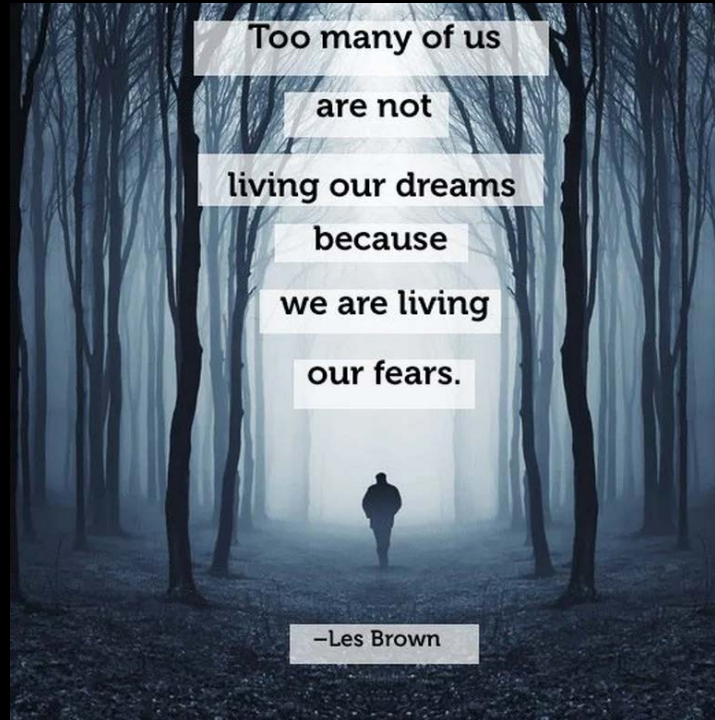
- Facing & Factor



- ear & Feedback

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Fear Factors

- Fear of rejection
- Fear of being right
- Fear can paralyze or inspire
- Fear can be lack of valuing change
- Speaking out may mean dislike
- Speaking out in respect

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Facing & Factoring in Fear & Feedback

- Disappointment, criticism &/or rejection
- The INGs of Responding
- What is said vs. what is heard

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• DOs and DON'Ts of Responding



**Let us not pray to be sheltered
from dangers but to be fearless
when facing them.**

Rabindranath Tagore

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Disappointment, Criticism &/or Rejection

- **Disappointment: something fails expectations**
- **Criticism: disagreement with your approach**
- **Rejection: vulnerability isn't appreciated**

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The ING's of Responding



- Awakening
- Rule-breaking
- Hand-shaking

Awaken-ING



- **Be aware**
- **Be present**
- **Show open body language/posture**
- **Consider the possibilities**
- **What if you ignore/defend**



Rule Break-ING

- Stand up for ideas, self & others
- Ask “How do you see this...”
- Ask “If this change is made...”
- Ask “Would you consider...”
- State “As I heard X, I’ve considered...”
- Say “Thank you!”





Hand Shake-ING



- Be done with discussion
- No “Agree to disagree”
- No “High road” or “Bigger person”
- No “It is what it is”
- Make peace, and move forward



Piece-of-Cake-ING

- **Simplicity: difference in easy & *simple***
- **No martyr, show grace**
- **No gossiping**
- **No rebuttal**
- **No revenge**
- **No repeat of reaction**

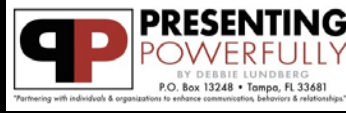




What Is Said Vs. What Is Heard

- Hearing = physical, listening = physiological
- Think of Reasons & Drivers (personality)
- Consider perspective

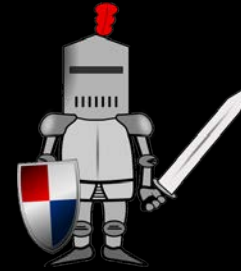
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- Ask questions

What Is Said Vs. What Is Heard

- Why questions evoke defense



- How questions create conversation



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Feedback is a gift...
if we let it be!



Feedback is providing
input, based on
expectations,
observations, and results
in an effort to assist
someone in improving
themselves and their



Criticism is telling
someone what was done
wrong based on your
opinion in an effort to get
the person to do things
your way or to make the
person feel so





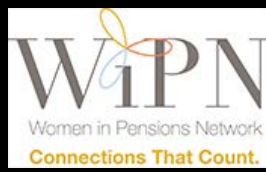
The differences in
feedback and
criticism are found in
intent delivery





People often provide
criticism and defend
feedback.





Leaders

provide & appreciate

both



The Art of Feedback

- Receiving
- Giving
- Perceiving
- Believing



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The Art of Feedback

- Receiving: Accept/consider
- Giving: Give response (not reaction)
- Perceiving: Look beyond words
- Believing: What to choose to take

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Assessing Time & Tone

Feedback delivered at the wrong time or with a harsh tone can simply be heard as *criticism*.



Time

- **Provide feedback within 24 hours**
- **Ask people feedback preferences**
- **Consider positive feedback publicly**
- **Deliver constructive feedback privately**
- **Think briefing & debriefing**
- **Provide & release**





Tone

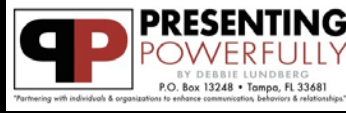
- **Come from leadership**
- **Give full attention**
- **Think include not exclude**
- **Want the best for the recipient**
- **Not just telling**
 - **Selling**
 - **Compelling**





Receive + Feedback

- “Thank you”
- “Okay, thanks for sharing”
- “You’re welcome. Thank you!”





Receive Questionable Feedback

- **Thank you**
- **Thank you for the feedback**
- **That's interesting you bring that up**
- **That's something I have/haven't...**
- **Okay. Please give me an example...**
- **Walk me through that fully, please**





TAKE Criticism

- **T – Thank/That's**

- **A – Ask**

- **K – Keep**

- **E – Explain**





TAKE Criticism

- **T – Thank the person (That's...)**
- **A – Ask for clarification/example**
- **K – Keep calm & focused**
- **E – Explain i**





Typical Feedback

- I liked it
- You were great
- I think you did well
- Good job!
- You need to.../you should
- That's a bad idea





Provide + Feedback

- Name _____
- What you do well is _____
- It's apparent when you...
- Thanks for





Provide + Feedback

- Name
- You are great at _____
- I noticed it when you...
- Thanks for





Provide Constructive Feedback

- Name
- You may want to consider _____
- When you do that, it'll likely...





Provide Constructive Feedback

- Name _____
- Regarding _____,
- You may want to incorporate _____
- I say this because _____





Provide Full Feedback

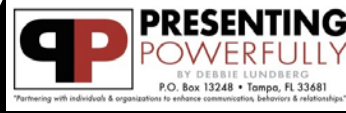
- Name
- Regarding _____,
- You are really effective with _____
- And
- You may want to consider _____
- They are both important because...





DOs and DON'Ts of Responding

- **Do consider if there is value**
- **Do consider options/opportunities**
- **Don't react (leads to overreacting)**
- **Don't second guess your skills**
- **Do allow confidence to shine**
- **Do forgive (yourself & others)**





DOs and DON'Ts of Responding

- Do use “and”
- Don’t use “but”
- Do say “How so?”
- Don’t use “I know”
- Do say “You may be right”
- Don’t say “You’re wrong”





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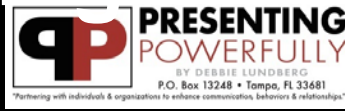


A Look Back

- 4 Reasons
- 4 Drivers
- Facing & Factoring In Fear & Feedback



Based on the book "Facing Fear & Factoring In Fear & Feedback" by Debbie Lundberg





Today's Goal

How'd we do?

Share realistic &
inspirational ways to lead
as you respond to

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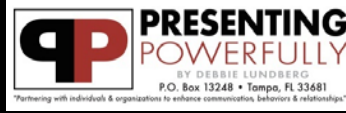
less-than-desirable





What did you hope
would be covered
today that was not?

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Stay in Touch:



Debbie@DebbieLundberg.com



PresentingPowerfullyByDebbieLundberg



@DebbieLundberg



It's not about getting up,
rather upping our
RESPONDING!



Thank you for your interest in:

Create a Culture:

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Thank you for including me in:

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