Session 6

Facilitating

Module 6: Facilitating & Coaching

Synopsis: The capstone module. It shifts the user from "learner" to "leader," providing the practical tools, scripts, and exercises needed to run WethosAI workshops.

- **Lesson 1: The Facilitator's Mindset**
  - Synopsis: Establishes the inclusion-first philosophy. Provides a cheat sheet for adapting the facilitation style to Boards, C-Suite, HR, and Ops teams.

- **Lesson 2: The Visual Language (Analogies)**
  - Synopsis: Scripts out the core teaching analogies: The Skyscraper (Ideas), The Boat & Pier (Relational), The Race (Action), and The Kitchen (Order).

- **Lesson 3: The "Aha!" Exercises**
  - Synopsis: Step-by-step instructions for the "Signature Exercise" (to physically demonstrate the cost of Flexing) and the "Water Bottle" (to demonstrate team completeness).

- **Lesson 4: Running the "Team Mapping" Workshop**
  - Synopsis: Teaches the specific reporting order for team exercises and how to use this flow to build alignment without friction.

Module 6: Facilitation & Coaching

Synopsis: This final module shifts from learning the tool to teaching it. It provides the practical frameworks, analogies, and exercises needed to facilitate powerful workshops and coach teams effectively.

- Lesson 1: The Facilitator's Mindset
    - Synopsis: Establishes the core philosophy: WethosAI is an inclusion tool, not a labeling tool. Provides a cheat sheet for adapting the message to different audiences (Board, C-Suite, HR, Ops).

- Lesson 2: Getting Buy-In and Explaining the Science
    - Synopsis: Explains how to overcome resistance from participants and laying the foundation of the Behavioral Science and all that differentiates the platform from other solutions.

- Lesson 3: The Visual Language (Analogies)
    - Synopsis: Scripts out the three core analogies used to teach the scales instantly: The Skyscraper (Ideas), The Boat & Pier (Relational), and The Chefs (Order).

- Lesson 4: The "Aha!" Exercises
    - Synopsis: Provides step-by-step instructions for the "Signature Exercise" (to explain Flexing) and the "Water Bottle Demonstration" (to explain Team Wholeness).

- Lesson 5: Running the Workshop
    - Synopsis: Details the "Secret Sauce" reporting order for team exercises (5s $\rightarrow$ 4s $\rightarrow$ 3s $\rightarrow$ 2s/1s) and why this specific sequence creates alignment.

- Wrap Up: The Facilitator's Charge
    - Synopsis: A final call to action, empowering the learner to move from analyzing charts to translating behavior and solving team friction.

The Facilitator's Mindset

The Inclusion Foundation

Teaching WethosAI requires a shift in mindset. Unlike other assessments that might categorize people into static "types" (like introvert/extrovert), WethosAI is an inclusion tool.

- No Boxes: We do not place people in boxes. We validate how they naturally show up.
- Predictive vs. Descriptive: Most assessments describe who you are (personality). WethosAI predicts what you will do (behavior).
- The Goal: To help individuals operate without apology or unnecessary deference. A direct communicator isn't "rude"; they are efficient. A blue sky thinker isn't "unfocused"; they are visionary.

Tailoring to Your Audience

You cannot facilitate the same way for every group. Use this guide to adapt:

- Board of Directors: Focus on Individual Profiling. Decisions here have high consequences and short timelines. Watch for "bravado" that silences necessary dissent.
- C-Suite: Focus on Execution Speed. They want to remove the friction that slows down decision-making.
- HR & L&D: Focus on Talent Pipelines. They care about hiring, onboarding, and long-term team dynamics.
- Operational Teams: Focus on Workflow. They value the day-to-day practicality of collaboration and hand-offs.
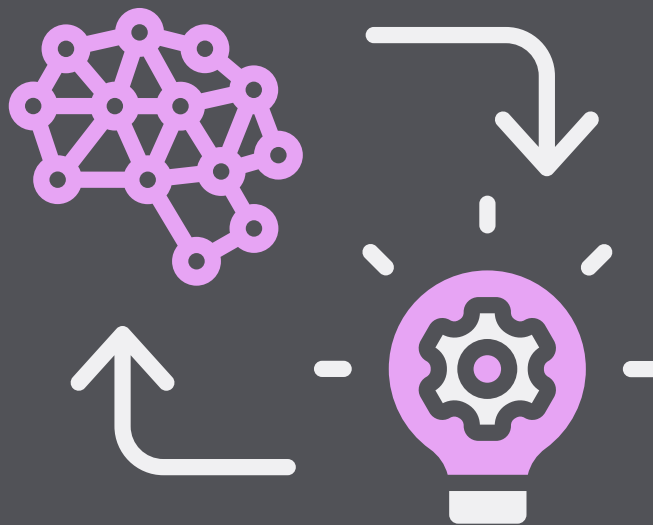
Gaining Buy-In & Explaining the Science

Getting Buy-In: Handling Skepticism
Facilitators often encounter "assessment fatigue." To get buy-in, you must differentiate WethosAI immediately.
- The Script: "Most assessments tell you who you are—your personality. That is interesting, but it doesn't always help you work better. WethosAI is different. It measures behavior. It predicts how you will act in a specific situation. We aren't here to label you; we are here to predict where your team will have friction so we can solve it before it happens."
- The "No Apology" Rule: Remind the team that high performance requires all styles. "We need the person who speeds us up (Action 5) just as much as the person who slows us down to check the details (Action 1). Neither is wrong."

Behavioral vs. Personality Assessment
The key distinction between WethosAI and other assessments is that it measures behavior, not personality. Personality inventories such as MBTI, DiSC, or StrengthsFinder identify who you are by focusing on traits. WethosAI instead identifies what you do—default behaviors that emerge from behaviors and can be observed, measured, and coached in action.

When it was developed (1982–1989), the assessment market was dominated by personality tools. The developers asked: if we know who someone is, what comes next? The answer was to determine how that person behaves, especially in ways that are predictive and contributive to team outcomes.

The 360-Degree Integration
The original questionnaire contained 270 items, later refined to 84 through rigorous testing. Participants provided references across both personal and organizational contexts. Only items where self-perception aligned with how others experienced the individual were retained. This ensured that WethosAI results consistently reflected not only self-view but also how people show up in real interactions and are perceived by others.

Team Performance Research Foundation
The foundation of WethosAI was built on studying 5,000 teams over three years. Researchers asked teams to recall their most successful performance moments and identify the activities that contributed. Through extensive testing (both qualitative and quantitative), four categories consistently emerged:
- Ideas – Processing and exchanging information
- Relational – Connecting ideas to self and others
- Action – Taking first steps after decisions
- Order – Following through to completion

Situational Contingency Theory
WethosAI is grounded in contingency theory: "if this, then this." Teams do not fail due to lack of intelligence, experience, or effort; they fail because they do not ask the right questions at the right time. Facilitators emphasize that the framework equips teams to pause, analyze context, and choose the appropriate behavioral response.

Explaining the Scales
Do's and Dont's by Scale

Ideas Scale

- Ideas 5's are **NOT** by definition more creative or innovative than ideas 1's. Everyone is capable of coming up with new ideas, it's more about how they process information and think about situations.
- Ideas 5's are **NOT** "visionaries" or "leaders" in comparison to 1's. 1's prefer to work within existing parameters but can be just as visionary as 5's.

Relational Scale

- Relational 5's are **NOT** more emotionally intelligent than 1's: 1's just prefer to work with logic and facts and observe emotions without engaging with them whereas 5's deeply engage with emotions.
- Relational 1's are **NOT** by definition more focused than Relational 5's.

Action Scale

- Action 1's are just as capable of leading as Action 5's. Action 5's like to lead but are not by definition leaders.
- Action 1's are **NOT** indecisive or lacking in action: they just prefer clarity before making moves.
- 5's are **NOT** fast and 1's are **NOT** slow.

Order Scale

- Order 1's are **NOT** disorganized. Order 5's organize everything in their lives whereas Order 1's are organized in certain areas and not in others. They are very capable of being organized.
- Order 5's can delegate, they just prefer not to.

Explaining the Scales
General Tips When Explaining the Scales

Mix up the order: if you start with 5 for Ideas, start with 1 for Relational

No Ideal Styles: 5's are not better than 1's and vice versa. There are no leader lines

Use Your Own Analogies! The analogies listed in this section are just examples. If there's a way you prefer to explain the scales, feel free!

Flex! Remember to note that just because someone's style says they're a 3333 doesn't mean they can't flex to be a 5555 or 1111.

Pause for Questions: As you're going along, pause and see if anyone has questions or comments. This should be interactive!

Involve the Team You're Working With: If Joe is a 5 on Order, when discussing that scale, make a point of incorporating Joe in the conversation when discussing 5's. Example: Does that resonate Joe?

Explaining the Scales

Ideas Scale: Sky Scraper Analogy

Ideas Scale
How people absorb information and express their thoughts.

Explaining the Ideas Scale

5 — Envisions possibilities

Top 100th Floor View: Sees all of the possibilities, undeveloped land, sees what could be, unobstructed view

4 — Conceptualizes strategies

75th Floor View: Sees possibilities, view is also framed by neighboring buildings, can see more details of the ground below

3 — Creates frameworks

50th Floor View: Can see more details of surrounding area while also noting areas of opportunity.

2 — Evaluates resources

25th Floor View: Focused more on things pertaining to the building itself and improving what's already there

1 — Assesses readiness

Ground Floor View: Exclusively focused on improving what's already there: are the sidewalks user friendly, is the front check in desk easy to find, etc.

Explaining the Scales

Ideas Scale

The Ideas Scale measures how someone naturally processes and expresses information, ranging from Visionary (5) to Practical (1). The Ideas Scale Shows whether someone naturally sees broad patterns first or specific details first

Common Elements Across All Segments:
- All about how information is processed and expressed
- Shows natural starting point for thinking about ideas
- Indicates verbal vs. internal processing preference
- Reflects comfort level with broad vs. specific concepts
- Purely about information processing - not implementation or action

This scale represents a spectrum from Visionary (broad, unlimited possibilities) to Practical (specific, detailed implications) in how people naturally process and express information.

Core Aspects
- Measures initial information processing approach
- Ranges from broad concepts to specific details
- Indicates verbal vs. internal processing preferences

Scale Ends
- Visionary (5):
  - Starts with big-picture possibilities
  - Generates multiple options
  - Focuses on potential and adaptation
- Practical (1):
  - Starts with concrete details
  - Refines existing concepts
  - Focuses on specific improvements

Important Notes
- **Not** about decision-making quality
- **Not** about creativity or intelligence
- **No** "better" end of the scale
- Shows natural starting point, **not capability**
- Part of information processing, **not implementation**

Explaining the Scales

Ideas Scale

Ideas Scale

The Ideas Scale measures how someone naturally processes and expresses information, ranging from Visionary (5) to Practical (1). The Ideas Scale Shows whether someone naturally sees broad patterns first or specific details first.

Segment	Core Question	Key Behaviors
Ideas 5 "Envisions Possibilities"	"What are all the possible opportunities and solutions?"	• Processes by thinking out loud through abstractions • Expresses thoughts through metaphors and big-picture stories • Sees and voices unlimited possibilities without filtering • Considers and explores any idea that could create change • Will surface all thoughts to test reactions and refine based on feedback
Ideas 4 "Conceptualizes Strategies"	"What would have the greatest strategic value to my organization or my area at this time?"	• Processes verbally but filters through organizational lens • Evaluates ideas for impact and consistency with objectives • Translates vision into actionable strategy • Can eliminate options that don't fit current context • Contextualizes ideas within organizational framework
Ideas 3 "Creates Frameworks"	"What would have the greatest strategic value to my organization or my area at this time?"	• Processes by understanding cause and effect relationships • Creates frameworks that bring vision to life • Balances different options and perspectives • Builds bridges between broad ideas and specific considerations • Integrates various viewpoints into cohesive systems
Ideas 2 "Evaluates Resources"	"What processes and resources do we need to make this work?"	• Processes through existing procedures and standards • Shapes ideas through available resources • Focuses on practical requirements • Thinks about long-term viability • Defines specific processes needed
Ideas 1 "Assesses Readiness"	"What are all the implications and contingencies we need to consider?"	• Processes by analyzing practical implications thoroughly • Sharpens ideas through detailed analysis • Focuses on efficiency and documentation • Assesses all contingencies and backup plans • Great at identifying impractical ideas, but might dismiss good ideas for minor issues too early.

Explaining the Scales

Relational Scale: Boat & Pier Analogy

Relational Scale
How you process emotion and engage interpersonally.

Explaining the Relational Scale

5 **Cultivates awareness**

Boat in Open Water: Affected by the tide, other boats passing by, feels things deeply, has perspective

4 **Builds connections**

Boat Slightly Sheltered by the Pier: It moves more noticeably with the waves and reacts to passing boats, showing a greater connection to the immediate environment.

3 **Balances perspectives**

The Docked Boat: A docked boat is secure to the pier yet slightly moves with the waves. It represents a midpoint, stable yet able to adjust and respond to the water's ebb and flow.

2 **Promotes authenticity**

Pier's Walking Surface: While it is stable and provides a firm standpoint, it occasionally feels the vibrations from people's movements or the impact of waves, indicating a slight, indirect responsiveness to the surroundings.

1 **Maintains objectivity**

Pier: The foundation of the pier is submerged and, deeply anchored into the seabed. It is immovable and unaffected by the surface activity, emphasizing stability and permanence.

Explaining the Scales

Relational Scale

Relational Scale

The Relational Scale measures how someone processes emotion and engages in interpersonal interactions, ranging from Interpersonal (5) to Factual (1). The Relational Scale shows whether someone naturally focuses on broad awareness or objective facts.

Common Elements Across All Segments:

- All about how emotion is processed
- Shows natural emotional processing style
- Indicates depth vs. breadth preference
- Reflects comfort with emotion vs. facts
- Purely about processing - not about empathy or relationship skills

This scale represents a spectrum from People-focused (broad emotional awareness) to Facts-focused (objective rationality) in how people naturally process emotional and qualitative information and engage with others.

Core Aspects

- Measures emotional processing approach
- Ranges from broad awareness to specific rationality
- Indicates depth vs. breadth in relationships

Scale Ends

- Interpersonal (5):
  - Broad awareness of many relationships
  - Carries "pebbles" representing each connection
  - Focuses on emotional awareness
- Factual (1):
  - Separates emotion from information
  - Processes objectively and rationally
  - Focuses on transparency

Important Notes

- **Not** about emotional intelligence
- **Not** about empathy capability
- **No** "better" end of the scale
- Shows natural **emotional processing style**
- Distinct from interpersonal **skills**

Explaining the Scales

Relational Scale

Relational Scale

The Relational Scale measures how someone processes emotion and engages in interpersonal interactions, ranging from People-focused (5) to Facts-focused (1). The Relational Scale shows whether someone naturally focuses on broad awareness or objective facts.

Segment	Core Question	Key Behaviors
Relational 5 "Cultivates Awareness"	"How is everyone connected and impacted?"	• Maintains broad awareness of many relationships • Easily shifts focus as people enter/exit their sphere • Has many relationships but fewer deep ones • Carries awareness of everyone in their sphere • Readily senses emotional needs
Relational 4 "Builds Connections"	"How can we deepen our connection?"	• Forms deeper connections with fewer people • Makes stronger emotional investments • Champions emotional support • Enhances collaboration through connection • Focuses on relationship depth
Relational 3 - "Balances Perspectives"	"Has everyone been heard fairly?"	• Negotiates between different viewpoints • Ensures everyone participates • Can see and interpret both sides • Makes sure all perspectives are considered • May create circular conversations seeking input
Relational 2 - "Promotes Authenticity"	"What needs to be said directly?"	• Values transparent communication • Speaks out directly and clearly • Comfortable with direct disagreement • Focuses on clarity over emotional impact • Maintains policy of open expression
Relational 1 - "Maintains Objectivity"	What are the objective facts?"	• Separates emotion from information • Processes things rationally • Less likely to volunteer thoughts • Challenges based on logic • Focuses solely on the issue itself

Explaining the Scales

Action Scale: Racing Analogy

Action Scale
How you pursue goals while considering others and the urgency for closure.

Explaining the Action Scale

5 — **Advances goals**

The Freestyle Racer - Emphasizing movement and adaptability, they are less concerned with a defined route or strategy and more focused on the challenge of the race, often exploring new tactics and paths as opportunities arise.

4 — **Moves people**

Co-Driver: Works collaboratively to navigate the course effectively. They provide real-time information and guidance, helping to balance instincts with strategic insights to achieve the best possible outcome.

3 — **Empowers alignment**

The Team Coordinator - Ensures that everyone is aligned with the race strategy. They facilitate effective communication across different team members, making sure that each part of the team works together seamlessly.

2 — **Analyzes then acts**

The Pit Crew Chief -They plan and execute with precision, ensuring that every action is timely and contributes directly towards maintaining the racer's momentum and minimizing downtime

1 — **Crystallizes understanding**

The Race Strategist - They analyze the course, predict potential challenges, and plan pit stops, ensuring every detail is in place to avoid delays and optimize performance.

Explaining the Scales
Action Scale

Action Scale
The Action Scale measures how someone pursues objectives while considering others involved and the urgency for closure, ranging from Expedient (5) to Methodical (1). The Action Scale shows whether someone focuses on broad project movement or coordinating specific efforts.

Common Elements Across All Segments:
- All about how goals are pursued
- Shows natural approach to driving progress
- Indicates comfort with broad vs. specific movement
- Reflects force of will in execution
- Focuses on converting decisions into action/movement

This scale represents a spectrum from Expedient (broad project movement) to Methodical (specific component coordination) in how people naturally drive progress toward objectives.

Core Aspects
- Measures approach to achieving goals and objectives
- Ranges from broad movement to specific coordination
- Indicates force of will in driving progress

Scale Ends
- Expedient (5):
  - Moves projects broadly and quickly
  - Drives forward momentum
  - Focuses on "is it moving?"
- Methodical (1):
  - Coordinates specific components
  - Ensures alignment and clarity
  - Focuses on "how is it moving?"

Important Notes
- **Not** about leadership ability
- **Not** about implementation quality
- **No** "better" end of the scale
- Shows natural approach to **driving progress**
- Distinct from planning – focuses on **movement**

Explaining the Scales

Action Scale

Action Scale

The Action Scale measures how someone pursues objectives while considering others involved and the urgency for closure, ranging from Expedient (5) to Methodical (1). The Action Scale shows whether someone focuses on broad project movement or coordinating specific efforts.

Segment	Core Question	Key Behaviors
Action 5 - "Advances Goals"	"Is the project moving forward?"	• Takes charge to move projects broadly • Uses personal force to drive momentum • Comfortable leading regardless of authority • Will address issues only if they halt progress • Keeps multiple projects moving simultaneously
Action 4 - "Moves People"	"Are people moving toward the objective?"	• Focuses on moving people, not just projects • Provides context and explanation • Comfortable leading from behind • Identifies high-impact milestones • Influences and determines next steps
Action 3 - "Empowers Alignment"	"Is everyone clear on their role and moving together?"	• Shares authority to achieve goals • Coordinates people and efforts • Ensures roles and tasks are clear • Balances movement with alignment • Focuses on creating mutual understanding
Action 2 - "Analyzes then Acts"	"Who is responsible for what specific tasks?"	• Focuses on who's doing each task • Drives role clarity and definition • Ensures right person in right role • Monitors task-level accountability • Adjusts roles based on progress
Action 1 - "Crystallizes Understanding"	"What exactly needs to be done at each step?"	• Breaks down tasks into specific steps • Seeks complete clarity before moving • Comfortable asking questions • Focuses on task-level details • Ensures each component is clear

Explaining the Scales

Order Scale: Chefs & Cooking Analogy

Order Scale
How people process and express ideas.

Explaining the Order Scale

5 — **Drive's precision**

The Pastry Chef - Requires precision and adherence to exact recipes to produce consistently perfect baked goods and desserts, emphasizing strict adherence to measurements and techniques.

4 — **Structures for accuracy**

The Sous Chef - Manages kitchen operations including meal prep sequence and plating guidelines, ensuring each dish meets the restaurant's standard.

3 — **Flexibly organizes**

The Restaurant Chef - Follows the restaurant's menu but can tweak recipes based on customer feedback or ingredient availability, balancing consistency with creativity.

2 — **Prioritizes impact**

The Personal Chef - Tailors meals to the preferences of clients, blending structure in meal planning with flexibility to adapt recipes to individual tastes.

1 — **Readily adapts**

The Experimental Chef - Loves to experiment with ingredients and cooking techniques, often creating dishes on the fly based on what is available or intriguing at the moment.

Explaining the Scales
Order Scale

Order Scale
The Order Scale measures how someone structures and completes tasks, ranging from Structured (5) to Flexible (1). The Order Scale shows whether someone naturally follows processes closely or adapts based on circumstances.

Common Elements Across All Segments:
- All about how tasks are completed
- Shows natural completion style
- Indicates process vs. impact preference
- Reflects comfort with structure vs. flexibility
- Purely about execution - not about capability

This scale represents a spectrum from Structured (thorough process adherence) to Flexible (adaptable impact focus) in how people naturally complete tasks and determine when something is done.

Core Aspects
- Measures approach to task completion
- Ranges from structured to flexible execution
- Indicates process vs. impact orientation
- Shows how someone determines when something is "done"

Scale Ends
- Structured (5):
  - Follows processes meticulously
  - Needs all steps completed
  - Focuses on thoroughness and precision
- Flexible (1):
  - Adapts based on conditions
  - Focuses on impact over process
  - Comfortable with quick pivots

Important Notes
- **Not** about organizational ability
- **Not** about attention to detail quality
- **No** "better" end of the scale
- Shows **natural completion style**
- **Not** tied to **capability**

Explaining the Scales

Order Scale

Order Scale

The Order Scale measures how someone structures and completes tasks, ranging from Structured (5) to Flexible (1). The Order Scale shows whether someone naturally follows processes closely or adapts based on circumstances.

| Segment	Core Question	Key Behaviors
Order 5 - "Drives Precision"	"Have we completed every step thoroughly?"	• Follows processes meticulously • Maintains personal control over tasks • Stays engaged until every detail is complete • Needs all steps done to feel finished • Rarely adjusts established processes
Order 4 - "Structures for Accuracy"	"Are we following the process correctly?"	• Gives clear instructions for completion • Stays engaged until later stages • Delegates but monitors progress • Prefers clarity in expectations • Can let go once confidence is established
Order 3 - "Flexibly Organizes"	"What adjustments would improve this?"	• Makes incremental adjustments • Considers trade-offs in the moment • Comfortable with 10% variations • Balances structure and flexibility • Assesses potential improvements during execution
Order 2 - "Prioritizes Impact"	"Are we achieving our goal?"	• Focuses on impact over process • Changes approach as needed • Values efficiency over thoroughness • Adapts methods based on conditions • Ready to move on when impact is achieved
Order 1 - "Readily Adapts"	"What does the current situation need?"	• Thrives on adaptability • Makes quick pivots • Focuses on speed of impact • Comfortable changing direction • Evaluates based on current conditions

Practical Teaching Techniques

The Signature Exercise

Facilitators ask participants to sign their name with their dominant hand, then again with their non-dominant hand.

- Dominant-hand signatures represent default behaviors—energizing, efficient, and natural.
- Non-dominant-hand signatures represent flex behaviors—slower, more draining, and requiring additional support and focus.

This exercise demonstrates that working outside one's default zone demands more time, energy, and resources.
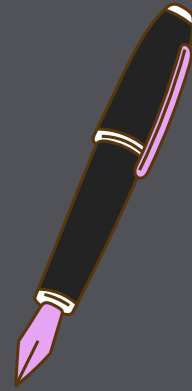
The Water Bottle Demonstration

- Facilitators use the example of a product label to illustrate team perspective. A complete label includes a logo, recycling symbol, ingredient list, bottling information, and barcode. Each represents an essential element of value.
- A team that covers all dimensions produces a complete product. A team that overemphasizes one area, such as branding, may end up with an appealing design but no barcode—meaning it cannot be sold.
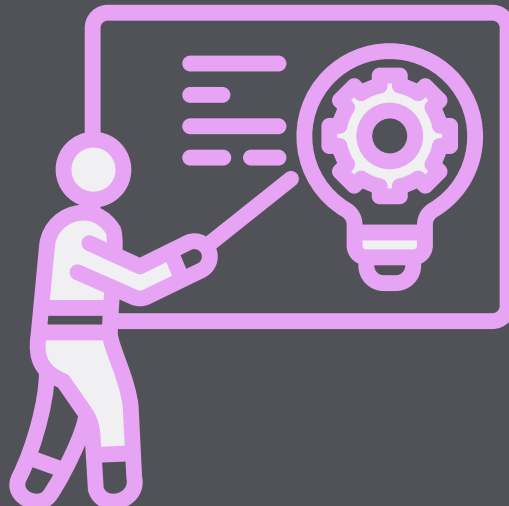
Practical Teaching Techniques

Team Mapping Exercise (The Core Teaching Tool)

Setup: Have participants stand in groups according to dimension levels: 5s together, 4s together, 3s in the center, and 1s and 2s grouped opposite.

Process: Pose the same question to all groups (e.g., What can we do in the remaining months of this year to improve (whatever is relevant for that team)? Allow 10 minutes for discussion, then report back in sequence:

- Start with the 5s (The Visionaries):
  - Their Lens: Expansion. "What is possible? How do we get bigger/better?"
  - Why First: If they go last, they will blow up the plan with new ideas. Let them dream early so their vision sets the stage.
- Go to the 4s (The Strategists):
  - Their Lens: Positioning. "Does this fit our brand? Is it strategic?"
  - The Value: They filter the 5s' broad ideas through the company's actual goals.
- Go to the 3s (The Coordinators):
  - Their Lens: Feasibility. "Can we actually do this? How does it fit our current systems?"
  - The Value: They bridge the gap between the dream and the reality.
- End with the 2s and 1s (The Executors):
  - Their Lens: Resources. "What is the budget? What is the timeline? Who is doing what?"
  - The Value: They turn the concept into a checklist. They ensure the car actually has gas.

Outcome: Every participant contributes, regardless of title or role. The structured sequence produces a full 360-degree perspective, blending vision, strategy, systems, and execution. Teams leave aligned and ready to move forward.

Practical Teaching Techniques

Identifying Clusters and Blind Spots

Clusters

Clusters occur when multiple team members fall in the same area of a scale. They create natural strengths (e.g., a group of high Relational thinkers fosters empathy and trust) but can also produce blind spots (e.g., avoidance of pragmatic or difficult decisions).

Blind Spots

Blind spots are dimensions with little or no representation. For example, a team with no low-Order members may miss opportunities for flexibility, while a team with no high-Ideas members may lack visionary direction.

Facilitation Exercise: Ask teams to identify both their cluster-driven strengths and their blind spots. Then coach them to design team practices—like structured prioritization or rotating responsibility—that account for those blind spots.

Communication Principles

Speaking How They Listen

Communication becomes more effective when tailored to how people process. For example, someone with a 5253 profile listens to decide and move forward. They want clarity about the outcome and the first steps, not long contextual framing. A facilitator can coach colleagues to provide a quick summary of objectives upfront, then ask for time to set context. This honors both processing styles.

Removing Communication Friction

The real power of WethosAI is in the pause between identifying an issue and applying data. This pause reduces misinterpretation and helps participants understand that differences are not competition or resistance but simply different default behaviors. Breakthrough moments often sound like: "Now I understand why you say it that way. You weren't trying to override me—you were processing differently."
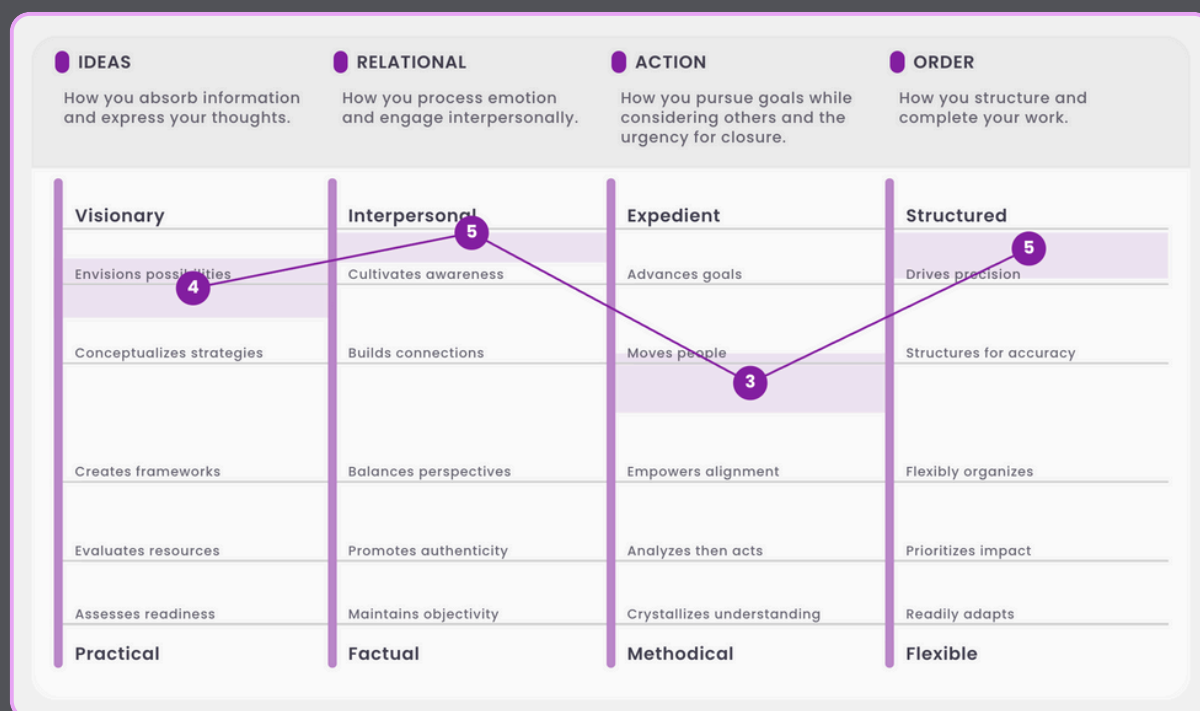
Addressing Flexing

The Dotted Line Concept

The separation between dimensions is not rigid. Think of it as a dotted line, meaning dominance in one area does not exclude flexibility in others. A Visionary result on Ideas does not prevent someone from flexing into Practical considerations—it simply means doing so will require more energy.

The Energy Cost of Flexing

Using the signature exercise analogy, the further someone moves from their natural placement, the more energy is required. Flexing demands:

- Additional time
- Environmental support (quiet space for detail work vs. collaborative space for brainstorming)
- Opportunities for clarification and feedback
- Recognition from teammates that it requires more effort

Facilitation Note: Encourage teams to recognize flexing as valuable but costly, and to design workflows that support individuals when flex is required.

IDEAS	RELATIONAL	ACTION	ORDER
How you absorb information and express your thoughts.	How you process emotion and engage interpersonally.	How you pursue goals while considering others and the urgency for closure.	How you structure and complete your work.
Visionary	**Interpersonal**	**Expedient**	**Structured**
Envisions possibilities	Cultivates awareness	Advances goals	Drives precision
Conceptualizes strategies	Builds connections	Moves people	Structures for accuracy
Creates frameworks	Balances perspectives	Empowers alignment	Flexibly organizes
Evaluates resources	Promotes authenticity	Analyzes then acts	Prioritizes impact
Assesses readiness	Maintains objectivity	Crystallizes understanding	Readily adapts
Practical	**Factual**	**Methodical**	**Flexible**

Advanced Coaching Applications

As a facilitator, you will encounter complex scenarios. Use these frameworks to coach deeper.

Individual Development (Context-Specific Coaching)
- The Challenge: An employee is struggling with a task outside their natural style (e.g., someone low on Order managing a complex budget).
- The Coaching: Do not just say "try harder." Advise them to change their environment.
  - Tactics: Find a distraction-free space. Budget 2x the normal time.
  - Reframing: Encourage them to take responsibility for oversight (ensuring it gets done) rather than construction (doing every row in the spreadsheet themselves). This protects their capacity while ensuring the result.

Addressing Equity Concerns
- The Challenge: Participants worry that assigning tasks based on comfort zones creates unfairness ("Why do I have to do the hard stuff while they do the fun stuff?").
- The Coaching: Distinguish between Responsibility and Execution.
  - Responsibility: Owning the outcome.
  - Execution: Doing the work.
  - The Lesson: A leader can retain responsibility for a high-stakes outcome while delegating the execution to someone with the natural strength for it. This isn't inequity; it's resource optimization.

Managing Direct Communication Styles
- The Challenge: Blunt or "colorful" communicators (often Action 5s or Relational 1s) unsettle the team.
- The Coaching: Do not ask them to change their personality entirely. That creates inauthenticity.
- The Solution: Coach Contextual Awareness.
  - Trusted Environments: "Be your authentic, direct self here."
  - New/Fragile Settings: "Adapt (flex) your style here to ensure your message lands."
  - The Warning: Forcing constant flex creates deficits by draining energy. Allow them safe spaces to be blunt.

Session Management Details

Physical Setup Considerations

- Board of Directors: Keep sessions seated, focusing on individual profiling.
- C-Suite: Begin with movement exercises, then allow them to decide whether to continue standing.
- HR and Operational Teams: Encourage standing for exercises to increase engagement and energy.

Technology and Flow Management

- Use click-through animations to reveal information gradually.
- Do not display entire team results until participants understand the framework.
- Keep visuals simple, ensuring backup plans exist for technical failures.

Managing Senior Leader Resistance

When senior leaders challenge the process, facilitators emphasize that the session values perspective over title. Remind leaders that hierarchy can unintentionally silence other voices, but the session requires everyone's contribution for optimal performance.

The Facilitator's Charge

Your goal is not just to explain the data; it is to create an experience where people can show up authentically.

- You are helping them move from Judgment ("Why are they like that?") to Prediction ("I know how they will react.").
- You are helping them move from Friction (working against grain) to Flow (leveraging natural strengths).

When you close a session, you leave them with this challenge: "We don't put people in boxes. We validate how they naturally show up so they can operate without apology. Now that you see the map, you can navigate the relationship."

Summary & Wrap Up

The WethosAI Professional Training Manual is a guide designed to equip facilitators with the knowledge and tools to teach the WethosAI framework. It emphasizes shifting the focus from personality traits (descriptive) to observable behaviors (predictive), enabling teams to improve performance, communication, and trust.

Module 1: Introduction and Overview
- The Purpose & Value: WethosAI is an inclusion tool that predicts behavior to reduce friction and enhance team performance, rather than labeling individuals.
- The Science & History: Based on 40 years of research and a "5,000 Team Study," the framework identifies four key activities (Ideas, Relational, Action, Order) using a 360-degree validation method.
- The Four Scales: Introduces the four behavioral scales:
  - Ideas: How you process information (Visionary vs. Practical).
  - Relational: How you engage with emotion (Interpersonal vs. Factual).
  - Action: How you pursue goals (Expedient vs. Methodical).
  - Order: How you structure work (Structured vs. Flexible).
- Onboarding & MDS: Explains onboarding methods (LinkedIn, Rapid, Full) and the Motivational Distortion Score (MDS), which measures response consistency (0-7: overly optimistic; 8-15: ideal; 16+: overly modest).

Module 2: Ideas and Relational Deep Dive
- The Ideas Scale: Details the 5 segments from Visionary (5) (abstract possibilities) to Practical (1) (concrete readiness).
- The Relational Scale: Details the 5 segments from Cultivates Awareness (5) (emotional insight) to Maintains Objectivity (1) (logic and facts).
- Line Movement (Decision Making): Analyzes the connection between Ideas and Relational scales to identify Subjective Processing (weighing qualitative factors) vs. Objective Processing (weighing quantitative facts).

Module 3: Action and Order Deep Dive
- The Action Scale: Details the 5 segments from Advances Goals (5) (bold momentum) to Crystallizes Understanding (1) (clarity first).
- The Order Scale: Details the 5 segments from Drives Precision (5) (meticulous process) to Readily Adapts (1) (flexible pivots).
- Line Movement (Execution): Analyzes the connection between Action and Order scales to identify Impact-Focused Execution (speed/outcomes) vs. Content-Focused Execution (precision/quality).

Module 4: Beyond the Numbers
- Active, Interactive & Reactive Behaviors:
- Active (4-5): Always on.
- Interactive (3): Toggles on/off as needed.
- Reactive (1-2): Triggered by necessity.
- Motivator Scales: Identifies primary drivers based on graph height (Ideas/Relational vs. Action/Order).
- Peak Scales: Interprets behavioral patterns based on the number of peaks (One, Two, Three, or Zero).
- Clusters: Analyzing groups of team members with similar scores to identify shared strengths (energy) and potential blind spots.

Summary & Wrap Up

Module 5: Understanding the Platform

- Personal Insights: Using "My Profile" and "WethosXO" (AI coach) for self-awareness.
- Team Architecture: Creating Core Groups (departments) and Project Groups (cross-functional) using the "Recommend a Group" feature.
- Collaboration Tools: Leveraging "Brainstorms" for agility and "Documents" with Google Drive Sync.
- Organization & Biases: Managing settings via the Admin Console, using CalendarIQ for meeting prep, and utilizing "Traits & Biases" analysis.

Module 6: Facilitating & Coaching

- The Facilitator's Mindset: Adapting facilitation styles for different audiences (Board, C-Suite, HR, Ops) and establishing the inclusion-first philosophy.
- Gaining Buy-In: Explaining the difference between personality (static) and behavior (dynamic) and using the "5,000 Team Study" to validate the science.
- Visual Language (Analogies):
  - Ideas: The Skyscraper
  - Relational: The Boat & The Pier
  - Action: The Race
  - Order: The Kitchen
- "Aha!" Exercises:
  - Signature Exercise: Demonstrates the energy cost of "Flexing" (signing with non-dominant hand).
  - Water Bottle: Demonstrates team completeness (Logo, Ingredients, Cap, Barcode).
- Running the Workshop: The "Team Mapping" reporting order (5s → 4s → 3s → 2s/1s) to build alignment.
- Advanced Coaching: Handling complex scenarios like individual development (Oversight vs. Execution), equity concerns, and managing direct communicators.
- The Facilitator's Charge: Moving from analyst to translator, helping teams shift from friction to flow.