



**CONNECT TO**  
**LEAD**  
**TO CONNECT**

**Fall Retreat and  
Competition for a Cause**

October 22-23, 2025



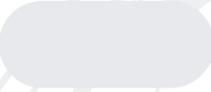
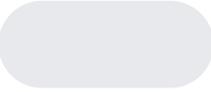
Unforgettable Leadership. Unforgettable Results.



# Brain Basics

## BIG DEAL #1:

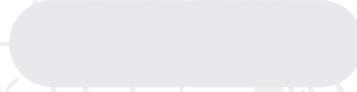
Your



is priceless

- Analysis
- Speech
- Creativity
- Willpower
- Innovation
- Planning
- Forming goals
- Evaluating consequences
- The brain's "CEO"

## BIG DEAL #3:



run the show

- Memory
- Health
- Emotions
- Critical role in learning
- Essential to memory
- Accelerating ingredient

## BIG DEAL #2:



to the brain is



to the brain

- Fight
- Flight
- Freeze
- Basic body function
- Especially triggered by threat and fear
- The brain's "bouncer"

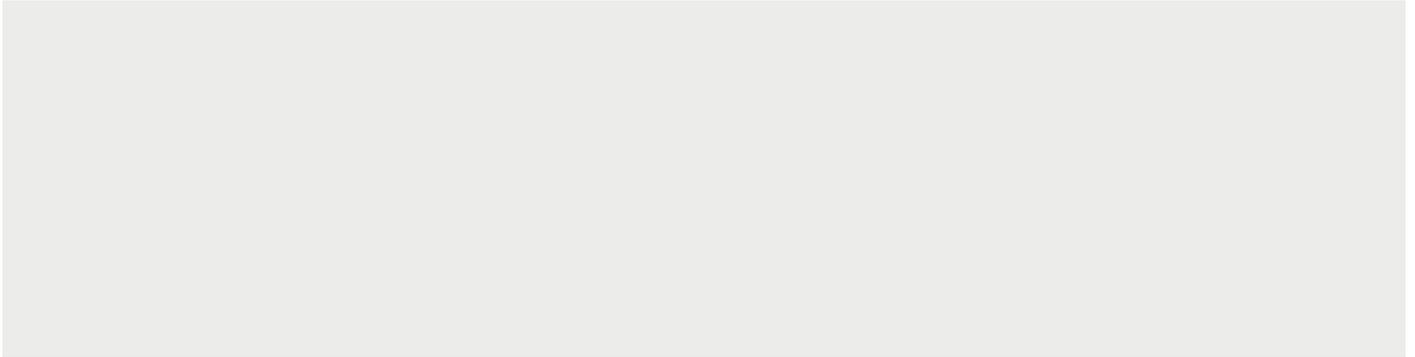
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We aren't thinking individuals who happen to have emotions...we are emotional individuals who happen to think.

- Joseph LeDoux

# Threat and the Brain

## The Impact of Threat on Performance



## The “Top Ten” Threats

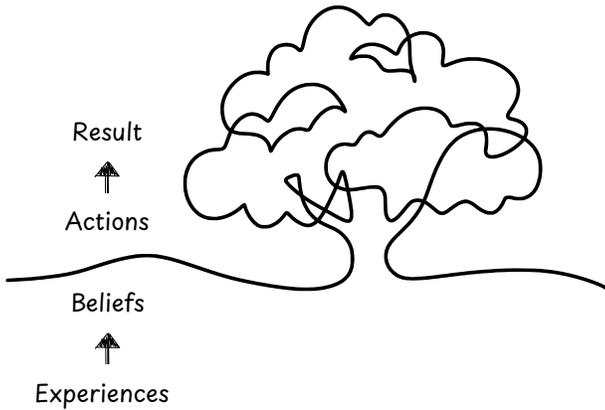
1. \_\_\_\_\_
2. \_\_\_\_\_
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7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

Threat is as debilitating to the brain as arthritis is to the body.

**- John Medina**

# Intelligence Reimagined

## Key Belief Shifts That Fueled Emotional Intelligence



The question isn't, "How smart are you?"  
The question is, "How are YOU smart?"

Intelligence:  
The ability to create products or provide services that are important to the culture or situation.

What intelligence is important when the culture or situation involves leadership?

*Intrapersonal Intelligence - Managing Self*  
*Interpersonal Intelligence - Influencing Others*

## EQ is 4x a better predictor of success for individuals and for teams

### Individuals



### Teams



Abilities such as being able to motivate oneself and persist in the face of frustrations; to control impulse and delay gratification; to regulate one's moods and keep distress from swamping the ability to think; to empathize and to hope.

- Daniel Goleman

# Connecting to Self

## Intrapersonal Intelligence (Managing Self)

**Directions:** Rate each statement by considering how frequently you display the behavior.

1. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I know when I experience mood shifts.	1	2	3	4
I know when I become defensive.	1	2	3	4
I know the impact my behavior has on others.	1	2	3	4
I keep situations and events in perspective and do not overreact.	1	2	3	4

Become a student of you. Dedicate a week to observe (without judgement) what you are feeling, what triggered that feeling, and how that feeling impacts others.

When an event or circumstance happens, question the meaning you give it. Observe how assigning a meaning impacts your feelings, your actions, and the outcome.

Shift from asking WHY questions to WHAT questions. For example, instead of asking, "Why is that person so rude?" ask, "What did this interaction teach me?"

1. What meaning am I giving this?

2. What meaning do I want to give this?

3. What do I know to be true?

4. What is mine to own? (and what isn't)

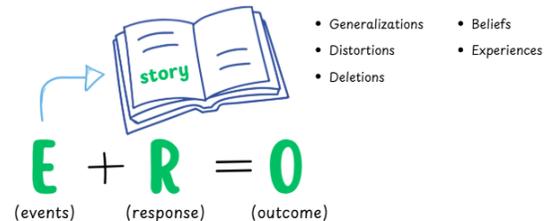
5. Where do I need clarity for the next step? (who can help?)

6. Does this deserve my attention or my energy?

7. What serves the greater good?

8. How might this be happening FOR me rather than TO me?

9. How do I respond in alignment with who I want to be?



# Connecting to Self

## Intrapersonal Intelligence (Managing Self)

2. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I avoid blaming, criticizing, and gossiping.	1	2	3	4
I look for solutions when faced with a problem.	1	2	3	4
I proactively stop ineffective behaviors.	1	2	3	4
I create opportunities rather than waiting on them.	1	2	3	4

If you are at the end of this year and reflecting back, what will have to have happened for you to feel good about your progress?

Where have you been waiting to be discovered? How might you go create the opportunity rather than wait on the opportunity?

Identify any ineffective behaviors you have that you want to stop. The likelihood of success increases to 95% if you have a specific plan and an accountability partner.



How did I create this?



What is mine to own?  
What isn't mine to own?



What problem needs to be solved?



What options are available to solve this problem?



What actions do I need to take?  
(who can help?)



What is the learning?  
(learning is winning)

### LINE OF ACCOUNTABILITY, RESPONSIBILITY, SELF-AWARENESS



Who/what can I blame?



Who/what can I criticize or complain about?



How can I be superior to everyone else?



Who is going to save me – who is going to fix this?



How am I a victim – who's fault is it?

# Connecting to Self

## Intrapersonal Intelligence (Managing Self)

3. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I maintain a positive, glass half-full outlook.	1	2	3	4
I openly express gratitude and appreciation.	1	2	3	4
I can promptly shift from a negative to a positive mindset.	1	2	3	4
I see setbacks as learning opportunities.	1	2	3	4

Choose one of the following exercises and implement it for a minimum of 21 days:

- Journal about something positive that has happened in the last 24 hours
- Meditate/pray
- Send a text or email to someone in your circle thanking or encouraging them
- Start your day by writing down 3 things you are grateful fo
- Exercise/move

### Strategies to Reset a Hijacked Brain

Reduce interference: Release the need to be liked, right, clear, in control, perfect

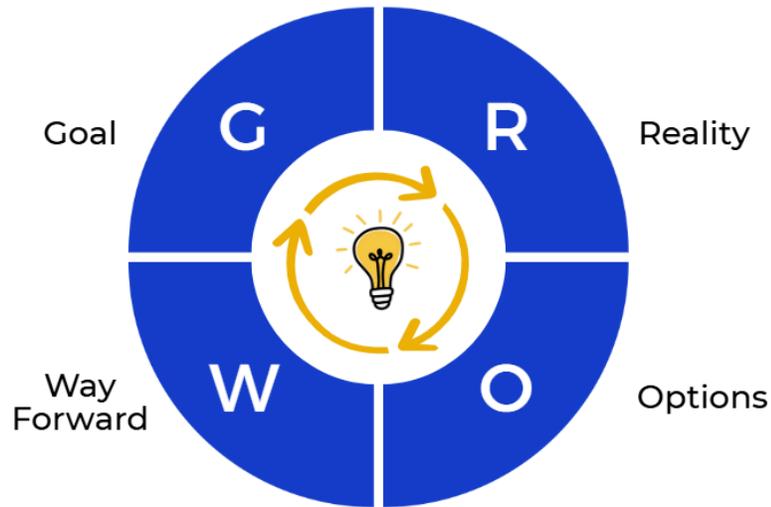
Think forward: What do you really want? Even better if?

Choose gratitude: How is this happening FOR me rather than TO me?

Make it fun: How would I approach this if it were fun?

Take responsibility: What is mine to own (and what isn't)? Who can help?

# GROW for Problem Solving



## Goal:

Clarify the goal

Discuss what an ideal blended work environment would look like for Connect and identify one practical recommendation to move us closer to that vision.

## Reality:

Discuss the current reality

Where are we now? Discuss what is currently working and what is not?

## Options:

Explore possibilities and options

Brainstorm solutions. What should we stop, start, continue?

## Way Forward:

Recommend a concrete next step

Out of the options above, what is one concrete action or recommendation to bring back to the group?

# Connecting to Others

## Interpersonal Intelligence (Influencing Others)

Directions: Rate each statement by considering how frequently you display the behavior.

1. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I listen to others fully without judgement.	1	2	3	4
I listen without offering advice or solutions.	1	2	3	4
I observe facial expressions and non-verbal cues.	1	2	3	4
I easily recognize what others are feeling.	1	2	3	4

In upcoming conversations, stay curious. Remember, people's choices and worldview makes sense to them – it doesn't have to make sense to you.

In upcoming conversations, tap the breaks on giving advice or solving the problem. Instead, ask generative questions that begin with 'what' or 'how.'

In upcoming meetings, be an intentional observer.

### Four Attributes

- Perspective taking, putting yourself in someone else's shoes
- Staying out of judgment and listening
- Recognizing emotion in another person
- Communicating that you can recognize that emotion



Empathy

~ Theresa Wiseman

# Connecting to Others

## Interpersonal Intelligence (Influencing Others)

Directions: Rate each statement by considering how frequently you display the behavior.

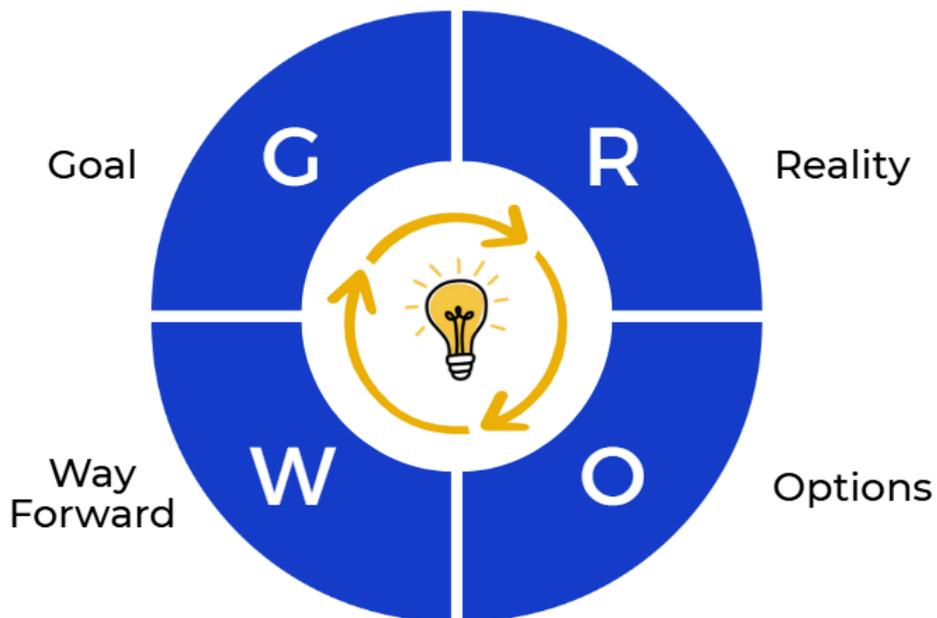
2. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I address "conflicts" promptly with high courage and high consideration.	1	2	3	4
I do not withhold feedback.	1	2	3	4
I speak my truth with candor and respect.	1	2	3	4
I set and enforce personal boundaries.	1	2	3	4

Use these maxims. Sooner is smaller, later is larger. Feedback is a gift. I was not put on the planet to be liked. To be clear is to be kind.

What is a conflict you've been avoiding or feedback you've been withholding? Use GROW to address these types of situations with high courage and high consideration.

What is a personal boundary you want to commit to honoring? What is your first step?



# GROW for Accountability

## Goal:



State the goal of the conversation. State a goal that is compelling to everyone involved. State the goal in the positive.

- What is the perfect outcome?
- If there were no limits, what would you do?
- What is the ultimate goal for this conversation?
- What outcome would you like to create through this conversation?

## Reality:



Allow everyone to share what he or she is experiencing. Fearlessly and objectively discuss the current situation. The purpose is not to reach agreement on reality but rather to establish there is a gap between where we are and where we need to be.

- Where are we now?
- What's holding you/us back?
- What are you experiencing?
- What is not working?
- What are current costs/struggles/frustrations?

# GROW for Accountability

## Options:



Collaboratively explore options to close the gap between the reality and the goal.

(If you are their leader, set clear performance expectations.)

- What are all of our options?
- What ideas do you have?
- What haven't we tried?
- What can we do differently?
- What has worked in the past?

## Way Forward:



Decide on the best options and clearly communicate the next steps, responsibilities, and timeline.

Set a follow-up conversation.

- What options do we want to take?
- Who will do that?
- What resources will we need?
- How do we hold each other accountable?
- When can we have a follow-up conversation?

# Connecting to Others

## Interpersonal Intelligence (Influencing Others)

Directions: Rate each statement by considering how frequently you display the behavior.

3. \_\_\_\_\_

	Almost Never	Occasionally	Frequently	Almost Always
I actively seek and welcome everyone's differences and similarities.	1	2	3	4
I protect and promote my team's reputation with outsiders.	1	2	3	4
I create a deep sense of belonging on my team.	1	2	3	4
I advocate for my team.	1	2	3	4

Use DiSC insights to intentionally develop talent, delegate tasks, and adapt communication.

Replace I/me with us/we.

Create opportunities for meaningful connection through structured and unstructured conversations.

### Your Brain on Threat

1. Hijacks the Prefrontal Cortex (PFC)
2. Triggers a Cortisol Stress Surge
3. Diminishes Creativity and Innovation
4. Distorts Perspective
5. Impairs Emotional Regulation
6. Reduces Learning and Memory Capacity
7. Elevates Risk of Physical and Mental Illness
8. Destroys Trust
9. Triggers flocking
10. Increases Resistance to Change

### Top 10 Threats:

1. Social rejection
2. Lack of honesty or trust
3. Change
4. Unrealistic expectations
5. Lack of resources
6. Risk of loss
7. Humiliation
8. Micromanagement
9. Perceived favoritism
10. Lack of meaningful work

### 3 Big Deals:

1. The PFC is priceless.
2. Threat to the brain is threat to the brain.
3. Emotions run the show.



### 3C's of Negative Threat

- **Confusion:** We have more confusion than clarity.
- **Control:** We feel we have little control over or say in the situation.
- **Consequences:** We anticipate a negative consequence.

## Rounding with Team

Steps:	Comments:
1. Make a personal connection Connect with something in their life such as children, interests, vacations, etc.	
2. What's working well? Like what? What's a best practice you've seen lately? Even better if?	
3. Is there anyone in our department we can recognize for doing great work? Who makes your life easier? Has anyone helped you recently?	Who:  What and Why?
4. Is there someone in another department we can recognize? Is there someone who has gone above and beyond?	Who:  What and Why?
5. Are there any systems or processes that need improving? What are obstacles?	
6. Do you have the resources you need to do your job?	
7. What (tough) questions do you have for me? <i>What's bugging you? Keeping you up at night?</i> <i>Is there anywhere you would like clarification?</i>	
8. Touch Base: (Reminder to every team member) <i>Ex: behaviors, policies, initiatives, etc.</i>	
9. Is there anything I can help you with right now? <i>I've got the time, what can I do for you now? What's a pressing need that I can help you with?</i>	

For more information on rounding, visit [www.studergroup.com](http://www.studergroup.com) – the site for Quint Studer

## Rounding with Stakeholders

Steps:	Comments:
<p>1. Make a personal connection <i>Connect with something in their life such as children, interests, vacations, etc.</i></p>	
<p>2. What's working well? <i>Even better if?</i></p>	
<p>3. Is there anyone who has been especially helpful?</p>	<p>Who:</p> <p>What and Why?</p>
<p>4. What improvements would you like to see? <i>What changes would add value? What would winning look like?</i></p>	<p>Who:</p> <p>What and Why?</p>
<p>5. What (tough) questions do you have for me? <i>Is there anything bugging you? Keeping you up at night? Is there anywhere you would like clarification?</i></p>	
<p>6. Is there anything I can help you with right now? <i>I've got the time, what can I do for you now? What's a pressing need that I can help you with immediately?</i></p>	

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## Connecting to Values

**Diversity:** Embrace and Promote diversity... Strength lies in differences, not in similarities.

**Service:** To provide excellent and fair service to our insureds, producers and claimants.

**Work Environment:** Provide a sense of family and a work environment of mutual support and growth where employees are respected and valued and provided opportunities to grow and succeed with the Company.

**Value:** Provide value to our producers by offering a consistent competitive product that can be sold in all types of market cycles.

**Integrity:** Being honest and applying strong moral principles to our day-to-day business practices.

**Success:** Creating consistent company accomplishments and sharing those accomplishments with employees and owners.

**Passion:** Approaching our business with enthusiasm capturing the energy and excitement of being one of the best companies in the Non-Standard Auto Space.

### USE VISION & VALUES:

- to maintain a standard of excellence.
- as a focal point.
- to begin every meeting.
- to lead change.
- to reinforce in every communication.
- to reward and recognize.
- to motivate in uncertain times.
- to make decisions.
- to hold people accountable.
- to focus tough conversations.

“

*Your current rules  
are creating your  
current results.*

# Connecting to Values

## 25 Trust-Building Actions

1. Extend trust to yourself and others.
2. Challenge the stories that play out in your head and the meaning you give events.
3. Use power words like appreciate and trust.
4. End requests with the powerful, clarifying phrase and here's why.
5. Share information as early as possible.
6. Consistently model respect.
7. Build a sense of inclusion and belonging in every interaction.
8. Always be open to learning, growth, and feedback.
9. Don't be the threat.
10. Maintain a growth mindset -
11. Adopt an attitude of "What do we have here that's good?"
12. Ask for help.
13. Create a hope FULL environment; communicate good things happen here.
14. Evaluate what is yours to own (and what isn't yours to own).
15. Give credit.
16. Identify how far you can push yourself and others.
17. Always communicate an "I am for you" attitude.
18. Consistently set up others for success; never to trick, humiliate, or belittle.
19. Choose to see setbacks as moments of valuable learning.
20. Self-regulate. Your team doesn't need a perfect leader; they need a collected leader.
21. Give a choice and a voice to promote engagement and ownership.
22. Honor the absent and refrain from gossip of any type.
23. Hold self and others accountable to any inappropriate behavior.
24. Avoid micromanaging by honing your delegation skills.
25. Introduce, lead, and manage change visibly, slowly, and deliberately and allow for employee input.

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Widespread distrust in a society imposes a kind of tax on all forms of economic activity, a tax that high-trust societies do not have to pay.

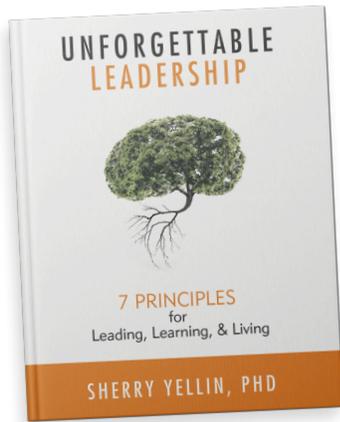
- Francis Fukuyama





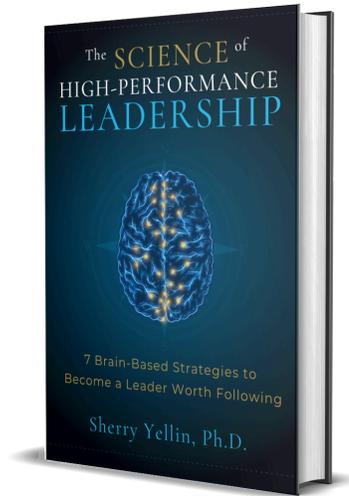
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