

Baker Hill Executive Team Alignment

Check-in #2

Why We're Doing This



The Five Behaviors of a Cohesive Team™ Model

High-performing teams build all five layers—not as a checklist, but as a set of habits that strengthen how they work together.

Agreed-upon CXO Ground Rules

- 
- be vulnerable
 - what is said in the room stays in the room
 - transparency
 - openness & candor

Team Operating Commitments



- Prioritize peer-to-peer conversations first—for all types of conversations.
 - And model that for your people.
- Agree to only escalate a conversation or concern if no resolution can be reached by talking directly with your peer.
- Own your own mistakes and commit to asking, “What can I learn?”
- Proactively identify elephants in the room.

Individual Commitments



Anna – Ask for what she needs (to vent, a decision, etc.) and lean on team members through conversation

Rick – Be open to feedback and ask for feedback during CXO meetings

Andy – Execute directly with the CXOs

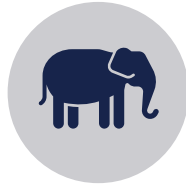
Malcolm – Intentionally think before speaking

Jason – Be more directive and speak up more often

Amy – Watch her tone

Sheila – Share her observations more proactively with the CXO team

What if...



IDENTIFY
ELEPHANTS



SPEAK UP



OWN MISTAKES



CLARIFY
DECISION
OWNERSHIP



TALK DIRECTLY



BE OPEN TO
FEEDBACK

What if...



WE BECAME EXCEPTIONAL AT PRACTICING
ONE LEADERSHIP BEHAVIOR?

Broad commitments inspire us.

Specific behaviors change us.

What if...



CLARIFY DECISION
OWNERSHIP

Proposed Decision-Ownership Pilot

The behavior: The CXO team intentionally owns a clearly defined category of decisions

Proposed Starting Parameters:

- Customer-invisible
- Low-stakes
- Limited duration (60–90 days)
- Andy remains informed but not involved within the agreed-upon scope

Still to be Designed Together:

- Decision category and owner
- What is inside—and outside—the pilot
- Exception triggers
- Informing process
- Success indicators

Initial Reactions

- What potential value do you see in testing this?
- What would need to be clear or true for you to feel comfortable trying this pilot?

Designing the Pilot Together

Together, determine:

- Decision category and owner
- What is inside and outside the pilot
- How and when Andy is informed
- Legitimate exception triggers

Signs of Success

If this specific pilot is working, what would we expect to observe over the next 60–90 days?

Our Pilot Agreement

Following today's check-in, I will send a written agreement that captures:

- The decision category and owner(s)
- The agreed-upon guardrails and exception process
- How and when Andy will be informed
- The pilot's start and end dates
- What success would look like and when we will review the pilot

Goals for Final Off-Site Retreat

We'll have our own experience to learn from! So...

- We'll know what worked.
- We'll know what surprised us.
- We'll know what we'd change.
- We can decide what to continue, adjust, or stop.

What Happens Next

NOW:

Decide on final off-site and assessment dates

STARTING TODAY:

Use the decision-ownership pilot for qualifying decisions.

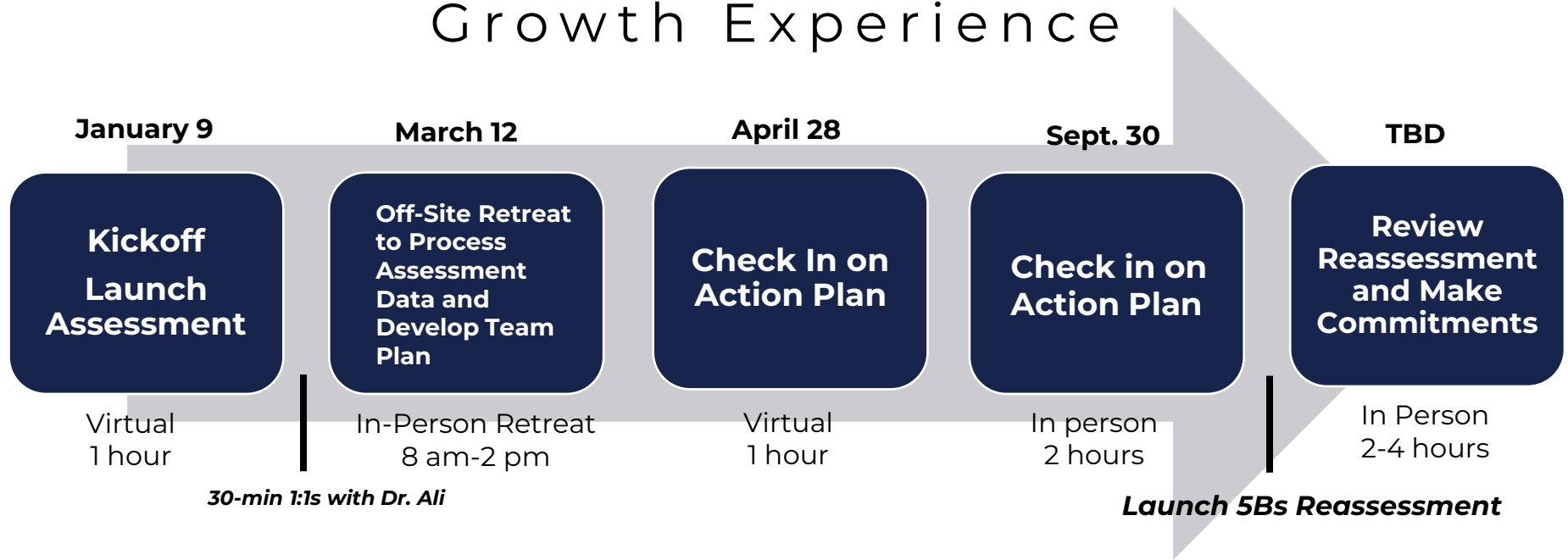
NEXT: FIVE BEHAVIORS REASSESSMENT

Take an honest snapshot of how the team has been functioning across the full engagement

FINAL OFF-SITE

Consider the reassessment results alongside what the team is learning from the pilot—and decide what to continue, adjust, or expand.

Phase 1 CXO Team Development: Growth Experience





THANK YOU!