

THE RELATIONSHIP FACTOR

Reader's Workbook

Application Exercises and Reflection Questions

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How to Use This Workbook

This workbook is designed to be used alongside *The Relationship Factor*. Each section corresponds to a chapter in the book and contains discussion questions and reflection exercises designed to help you apply the frameworks to your actual leadership context.

The questions are organized in three types. Reflection questions ask you to examine your own experience, behavior, and assumptions. Application questions ask you to apply the book's frameworks — Leader-Member Exchange (LMX) theory, Human Performance Improvement (HPI), and Generational Cohort Theory (GCT) — to your current team and organization. Action questions ask you to identify specific behavioral changes you intend to make.

You can work through this workbook individually as a leadership journal, in small group discussion with peers or a team, in a formal coaching or development program, or as a management team working through the frameworks together.

There are no correct answers. The value is in the specificity: the more concrete and honest you are in your responses, the more useful the workbook becomes.

Preface: Your Research Starting Point

The preface establishes the book's origin in 20+ years of research beginning at Boise State University, and its grounding in an approved doctoral research plan examining managerial behavior, job satisfaction, and Millennial retention.

Reflection Questions

1. How did you come to your current leadership role? What formative experiences — educational, professional, personal — most shaped how you think about leading others?

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2. The author's research focused on one central question: why do good employees leave? Before reading further, write your answer to that question as you understand it today. You will return to this at the end of the workbook.

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3. What is one belief about management or leadership that you hold strongly — and that you are open to having challenged by what you read?
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PART ONE — FOUNDATIONS

Chapter 1: Leadership and Management as a Single Practice

Chapter 1 argues that the distinction between 'leader' and 'manager' is a false dichotomy that obscures rather than clarifies. Both roles require the same fundamental behaviors, calibrated to the people being led. Performance is defined by accomplishments, not behaviors.

Reflection

1. Think of the best person who has ever supervised you. Without labeling them a 'leader' or 'manager,' describe in behavioral terms what they actually did that made them effective.

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2. In your current role, what percentage of your attention is on behaviors and processes versus outcomes and accomplishments? What would it look like to shift that ratio by 20%?

Application: The Procedure Audit

List three recurring procedures or requirements in your team's work. For each one, write the original outcome it was designed to produce, then honestly assess whether it still produces that outcome.

Procedure 1:

Procedure 2:

Procedure 3:

Action

- 3.** Based on your procedure audit: which procedure has become most disconnected from its intended outcome? What would you do to reconnect it — or retire it?
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Chapter 2: Human Performance Improvement — The Foundational Science

Chapter 2 introduces Gilbert's Behavior Engineering Model (BEM), which organizes the root causes of performance gaps into six factors: three environmental (information, instrumentation, motivation) and three individual (knowledge, capacity, motives). Environmental factors are the manager's responsibility and account for the majority of performance variance.

Reflection

1. Think of a current performance problem on your team. Before reading the BEM, you might have attributed it to an employee deficiency. Using the BEM framework, analyze the same problem: which of the six factors might be contributing?

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2. Of the three environmental factors you control — information clarity, tools and resources, and motivational incentives — which is least well-designed for your team right now? What specifically is missing or misaligned?

Application: BEM Team Diagnostic

Rate your current performance environment for each BEM environmental factor from 1 (weak) to 5 (strong). Then note the single most important improvement for each.

Information (Are expectations, feedback, and context clear?) Rating: ___/5

Most important improvement:

Instrumentation (Do employees have the right tools and resources?) Rating: ___/5

Most important improvement:

Motivation (Do incentives reinforce the right behaviors and outcomes?) Rating: ___/5

Most important improvement:

Action

3. Identify the single highest-leverage environmental improvement you could make in the next 30 days. What would you change, how would you change it, and how would you measure whether it improved performance?

Chapter 3: Leader-Member Exchange — The Relationship Continuum

Chapter 3 introduces LMX theory: leaders develop differentiated relationships of varying quality with each direct report. High-quality LMX relationships — characterized by affect, loyalty, contribution, and professional respect — drive job satisfaction, performance, and retention. LMX quality is the multiplier on every BEM environmental factor.

Reflection: LMX Inventory

For each of your direct reports, rate the quality of your relationship on each LMX dimension from 1 (low) to 5 (high). Be honest — these ratings are for your own development only.

Employee Name / Role	Affect	Loyalty	Contribution	Prof. Respect	Overall
	__	__	__	__	__
	__	__	__	__	__
	__	__	__	__	__
	__	__	__	__	__
	__	__	__	__	__
	__	__	__	__	__

Application

1. Which relationship shows the largest opportunity for improvement? What specific behavior from you would most directly elevate that relationship's quality?
2. LMX differentiation is inevitable — but it can be based on transparent, merit-related criteria or on personal affinity and unconscious bias. Which is more often true in your case? What evidence supports your answer?

Action

3. Identify one direct report you have been under-investing in relationally. Write down three specific interactions you will initiate in the next two weeks to begin improving that relationship.
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PART TWO — THE GENERATIONAL LANDSCAPE

Chapter 4: Generational Cohort Theory

Chapter 4 introduces Generational Cohort Theory: shared formative experiences shape shared tendencies in how cohorts approach work, authority, loyalty, and motivation. GCT is a probabilistic framework — a starting point for understanding individuals, not a deterministic label.

Reflection

1. What are the two or three most formative historical or cultural events that shaped your own relationship with work, authority, and loyalty? How do they show up in how you manage today?
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2. GCT argues that generational tendencies are real but probabilistic — individuals vary. Think of someone on your team who defies their generational pattern. What explains the divergence?
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Application: Generational Mapping

3. List the generational makeup of your immediate team. Where do you have the most generational diversity? Where do you have gaps — either in representation or in your own knowledge of a cohort's tendencies?
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4. How would you describe your organization's implicit assumption about what a 'good employee' looks like? Which generation's values does that assumption most closely reflect — and who does it disadvantage?

Chapter 5: Baby Boomers — The Judgment Generation

Boomers are motivated by recognition, status, and mastery. They value professional respect and consistent decision-making from managers. They are also carriers of deep institutional knowledge that is at risk of being lost.

Reflection & Application

1. If you have Boomer employees: how are you honoring their expertise publicly? If you are a Boomer: how are you actively transferring your institutional knowledge to colleagues who will outlast you in the organization?

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2. What formal or informal mechanism do you have for capturing the tacit knowledge Boomer employees carry? If none, what would a simple, low-friction version look like?

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3. A Boomer employee has declined a new initiative you believe is valuable. Using the LMX and HPI frameworks, diagnose what might be driving the resistance — and design a conversation to address it.
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Chapter 6: Generation X — The Autonomous Skeptics

Gen X employees value competence, autonomy, and directness. They distrust institutional loyalty and respond poorly to micromanagement. They now occupy most middle management roles — and their management style often misfires with younger cohorts.

Reflection & Application

1. If you are a Gen X manager: which of your management behaviors were shaped by your own formative experience of self-reliance and institutional skepticism — and which of those behaviors may not serve your Millennial or Gen Z direct reports?

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2. Gen X employees need clear outcomes and high autonomy. Describe one current assignment where you are over-specifying the process and under-specifying the outcome. How would you redesign it?

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3. The chapter describes a 'Gen X management gap' — where Xers' preferred style clashes with younger cohorts' needs. Where do you see evidence of this gap in your organization? What would close it?
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Chapter 7: Millennials — The Achievement-Oriented Generation

Millennials are the largest cohort in today's workforce. They are driven by recognition, growth, transparency, and meaningful work. They will leave quickly when those conditions are not present — and the cost is substantial.

Reflection & Application

1. Think of the last Millennial employee who left your team or organization voluntarily. With honest hindsight, what role — if any — did their relationship with their direct manager play in that decision?

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2. Millennials want to understand why, not just what. Identify one decision you recently made for your team that you communicated without sufficient context. How would you communicate it differently?

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3. Millennials value development as part of the employment deal — not an occasional benefit. Map out the development investment you are making in each of your Millennial direct reports right now. Is it sufficient? Is it visible to them?
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Chapter 8: Generation Z — The Purpose-Driven Digital Natives

Gen Z employees are purpose-driven, digitally native, values-aligned, and the most likely to exit when expectations are unmet. They are also the most likely to call out ethical gaps — and to build AI fluency faster than any other cohort.

Reflection & Application

1. Gen Z reports that 50% have already declined employers or assignments due to value misalignment. What are your organization's stated values? How well do your day-to-day management behaviors reflect those values? Ask a Gen Z employee — their answer may surprise you.

2. Gen Z expects real-time digital communication from their managers. Honestly evaluate your digital communication style: how responsive, personalized, and authentic is it? What would you change?

3. Gen Z is the most purpose-driven and the most AI-fluent generation in the workforce. How are you leveraging both of those strengths? Are you currently using Gen Z employees as teachers — or only as learners?

PART THREE — WHERE THE THEORIES CONVERGE

Chapter 9: Integration — LMX, HPI, and the Generational Lens

Chapter 9 synthesizes the three frameworks into a unified model. LMX is the channel through which HPI environmental factors are delivered. GCT tells managers how to calibrate both for each generational cohort. The eleven managerial competencies identified by Jhun, Bae, and Rhee (2012) operationalize the model.

Integration Exercise

Choose one direct report you would like to develop a more intentional management approach for. Answer the following using all three frameworks.

Employee profile (generation, tenure, role):

Current LMX quality (affect / loyalty / contribution / respect):

Weakest BEM environmental factor for this employee:

Generational considerations that should shape your approach:

One concrete action you will take in the next 30 days:

Chapter 10: Turnover Through the Integrated Lens

Chapter 10 applies the integrated framework to the retention problem. When employees leave, they leave the manager — not the company. The managerial behaviors that most directly drive retention are those that simultaneously build LMX quality and deliver BEM environmental support.

Retention Audit

1. In the last two years, list every voluntary departure from your team or department that you can recall. For each one, what was the primary driver of their exit — and what managerial behavior (yours or their manager's) contributed to it?

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2. Your organization almost certainly has retention programs and processes. List the top three. For each one, is it addressing a root cause (LMX quality, BEM environmental factors) or a symptom (exit interview data, satisfaction scores)? What would addressing the root cause look like?

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3. Which generational cohort on your team is at the highest risk of departure in the next 12 months? What specific environmental or relational factors are driving that risk — and what would reduce it?
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PART FOUR — PRACTICAL IMPLICATIONS

Chapter 11: The Generationally Intelligent Manager

Chapter 11 translates the integrated framework into five actionable principles: differentiate without discriminating, calibrate communication, customize development, align recognition, and hold the outcomes line.

Communication Calibration Exercise

For each direct report, answer: (a) How do they prefer to receive information — channel, frequency, level of detail? (b) When did I last ask them explicitly? (c) What would I change about how I currently communicate with them?

Recognition Mapping

1. List your three most recent acts of recognition — what you said or did, to whom, and in what format. Based on what you now know about generational recognition preferences, was each one well-calibrated? What would you do differently?
 2. The outcomes-over-process principle applies to recognition too: the question is not whether you recognized someone, but whether the recognition actually produced the motivation it was designed to produce. Evaluate your recent recognition honestly on this standard.
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Chapter 12: Organizational Recommendations

Chapter 12 argues that individual manager effectiveness is constrained by organizational systems. Flexible work architecture, generation-specific development infrastructure, and manager development programs that build generational intelligence are the structural changes organizations must make.

Organizational Assessment

1. On a scale of 1-5, how well does your organization's work architecture (schedule flexibility, remote options, autonomy over task management) accommodate the full range of generational preferences? What is the single most important structural change that would improve retention across all cohorts?

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2. How does your organization currently develop managers? Does the program explicitly address generational differences, LMX quality-building, and HPI-informed performance management — or does it focus primarily on technical management skills? What is missing?

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3. If you could change one organizational policy or practice tomorrow that would measurably improve multi-generational engagement and retention, what would it be? What is preventing that change?
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Chapter 13: Building AI Capability for Human Performance

Chapter 13 frames AI capability as a performance improvement challenge, not a training initiative. Six core AI skills define workforce AI capability: conceptual understanding, prompt and task design, critical evaluation, integration with domain expertise, ethical and compliance awareness, and continuous adaptation.

AI Capability Self-Assessment

Rate yourself honestly on each of the six AI capability domains from 1 (emerging) to 5 (proficient).

Conceptual Understanding (know what AI can/cannot do) ____/5

Prompt and Task Design (structure work effectively for AI) ____/5

Critical Evaluation (recognize when AI output is wrong) ____/5

Integration with Domain Expertise (amplify what you know) ____/5

Ethical and Compliance Awareness (understand AI risks) ____/5

Continuous Adaptation (keep learning as tools evolve) ____/5

1. Based on your self-assessment, which domain represents your most important development priority? What specific action would you take in the next 30 days to begin closing that gap?

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2. How does your organization currently support AI capability development? Apply the BEM: is the information environment (policy and guidance) clear? Is instrumentation (sanctioned tools) in place? Does the motivational environment reward effective AI use?
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3. Gen Z employees are likely the most AI-fluent on your team. In what specific way could you use that fluency — treating them as teachers rather than learners? What would that look like in practice?

Appendix: The LMX Leadership Self-Assessment

This validated self-assessment adapts two academic instruments — the LMX-7 (Graen & Uhl-Bien, 1995) and the multidimensional LMX-MDM (Liden & Maslyn, 1998) — into a manager-facing diagnostic. Complete it separately for each person who reports to you. Score honestly about your actual behavior over the past few months, not your intentions.

Choose One Direct Report

Write the name (or initials) of the direct report you are assessing. Photocopy or repeat this appendix for each member of your team — your relationship with each person is different, and that is the point.

Part One: The Four-Dimension Relationship Audit

Rate your honest agreement with each statement: 1 (Strongly Disagree), 2 (Disagree), 3 (Neutral), 4 (Agree), 5 (Strongly Agree). Write your score in each blank, then total each dimension.

AFFECT — Mutual Regard

1. I genuinely like this person as an individual, not only as a performer. ___/5
2. This person would say I care about them as a person, not just an employee. ___/5
3. I know what matters to this person — their goals, concerns, circumstances. ___/5

Affect subtotal: ___/15

LOYALTY — Public Support

4. I defend this person's work and reputation to others when they aren't present. ___/5
5. This person has seen me advocate for them at some cost or risk to myself. ___/5
6. I absorb organizational pressure rather than passing it straight through to them. ___/5

Loyalty subtotal: ___/15

CONTRIBUTION — Reciprocal Investment

7. I invest in this person's success beyond what my role strictly requires. ___/5
8. I give this person development and information I don't automatically give everyone. ___/5
9. This person and I each go beyond the minimum for one another. ___/5

Contribution subtotal: ___/15

PROFESSIONAL RESPECT — Competence-Based Esteem

10. I respect this person's competence, and they know that I do. ___/5
11. I have given specific, genuine recognition of their expertise this past month. ___/5
12. This person would say I understand what their work actually involves. ___/5

Professional Respect subtotal: ___/15

Part Two: The Relationship Quality Pulse

Adapted from the LMX-7 (Graen & Uhl-Bien, 1995). Rate each from 1 (low) to 5 (high).

13. Do I know whether this person is satisfied with what I do as their manager? ___/5
14. How well do I understand this person's job problems and needs? ___/5
15. How well do I recognize this person's potential? ___/5
16. How likely am I to use my influence to help solve their work problems? ___/5
17. How likely am I to advocate for this person at cost to myself? ___/5
18. Overall, our working relationship is (1 = ineffective, 5 = highly effective): ___/5

Part Three: Find Your Pattern

Complete the assessment for every direct report, then answer these diagnostic questions:

- A.** Across your whole team, which dimension is consistently lowest? This is your personal LMX gap — the relational behavior you must develop deliberately.

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- B.** Do your scores cluster high for some people and low for others? If so, does that differentiation track genuine merit and contribution — or does it track affinity, similarity to yourself, or generational comfort?

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- C.** Which single relationship has the lowest total, and what is the specific root cause — thin investment, a trust-damaging incident, low visibility of their work, or unconscious bias?

Part Four: Your Development Commitment

Based on your lowest dimension, write the three specific behaviors you will change in the next 30 days. Use the dimension-specific guidance in the book's Appendix (affect, loyalty, contribution, or professional respect).

Conclusion: Closing the Loop

Return to Your Starting Point

In the Preface section of this workbook, you wrote your answer to: 'Why do good employees leave?' Return to what you wrote. How has your answer changed after working through the book and these exercises?

Commitments

Based on everything you have read and reflected on, complete these three commitments:

The single most important LMX quality improvement I will make:

The single most important BEM environmental change I will make:

The one generationally-specific management behavior I will change:

The relationship is not a soft factor. It is the strategy.