The **4** Essential Roles of
LEADERSHIP™

ABOUT FRANKLINCOVEY

FranklinCovey is a global company specializing in performance improvement.

We help organizations achieve results that require a change in human behavior. Our expertise is in seven areas: Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, and Education.

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Franklin Covey Co.
2200 W. Parkway Blvd.
Salt Lake City, UT 84119
www.franklincovey.com

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The 4 Essential Roles of LEADERSHIP™

Workbook

Name

INTRODUCTION

How Can I Be a More Effective Leader?

> ❝
>
> *Leaders are born and so are you.*
>
> **JAMES M. KOUZES AND BARRY Z. POSNER**

LEADERSHIP…

1. Is a choice, not a position.

2. Is a skill that can be learned.

3. Requires making change and progress.

4. Is about influence—achieving results through others.

WHAT IS LEADERSHIP TO YOU?

What Business Leaders Want

Looking ahead, senior business leaders want the leaders in their organizations to be able to:

1. Think BIG and adapt quickly.

2. Develop and execute strategy.

3. Coach and improve performance.

FRANKLINCOVEY & THE RE-WIRED GROUP

LEADERSHIP BREAKDOWNS

There are four chronic issues that cause leadership to break down and lead to poor results.

4 ESSENTIAL ROLES OF LEADERSHIP

TIAL ROLES
DERSHIP

1

ADER IS AND WHAT A LEADER DOES

leaders choose to consistently live four
leadership roles. They:

pire Trust by being models of character
d competence.

eate Vision by rallying their teams around
important purpose.

Execute Strategy through consistent, focused
discipline and alignment.

Potential by unleashing the untapped
their team.
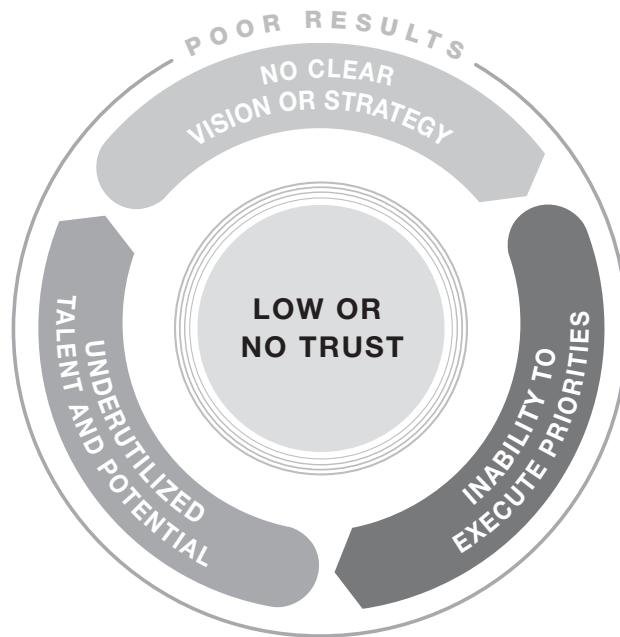
4 ESSENTIAL ROLES
of Leadership

Effective leaders choose to consistently live four essential leadership roles. They:

- **Inspire Trust** by being models of character and competence.
- **Create Vision** by rallying their teams around an important purpose.
- **Execute Strategy** through consistent, focused discipline and alignment.
- **Coach Potential** by unleashing the untapped talent and potential of their team.

RESULTS

CREATE VISION

COACH POTENTIAL

INSPIRE TRUST

EXECUTE STRATEGY
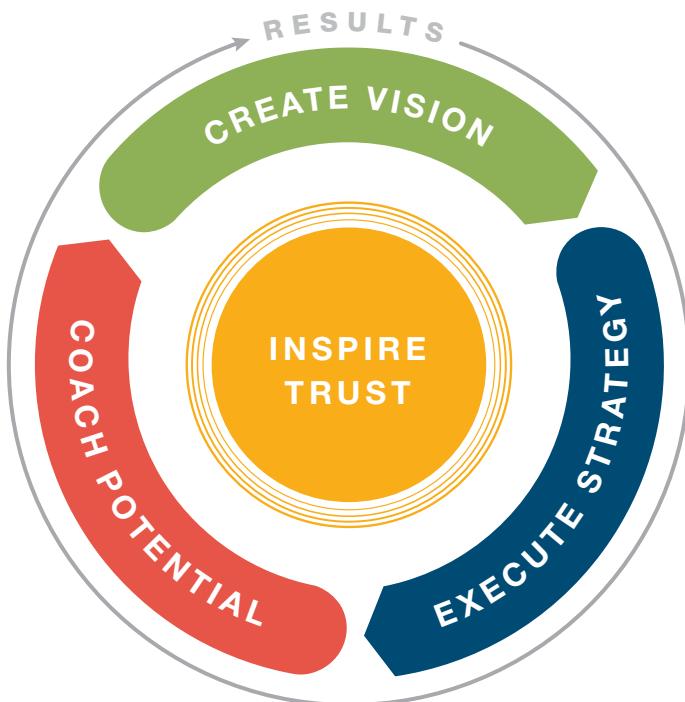
LEVELS OF
Engagement

As leaders, we **create conditions** where people can choose to volunteer their best efforts and highest energy.

CHOICES

CREATIVE EXCITEMENT

HEARTFELT COMMITMENT

WILLING COOPERATION

INDIFFERENT COMPLIANCE

RESENTFUL OBEDIENCE

REBEL OR QUIT
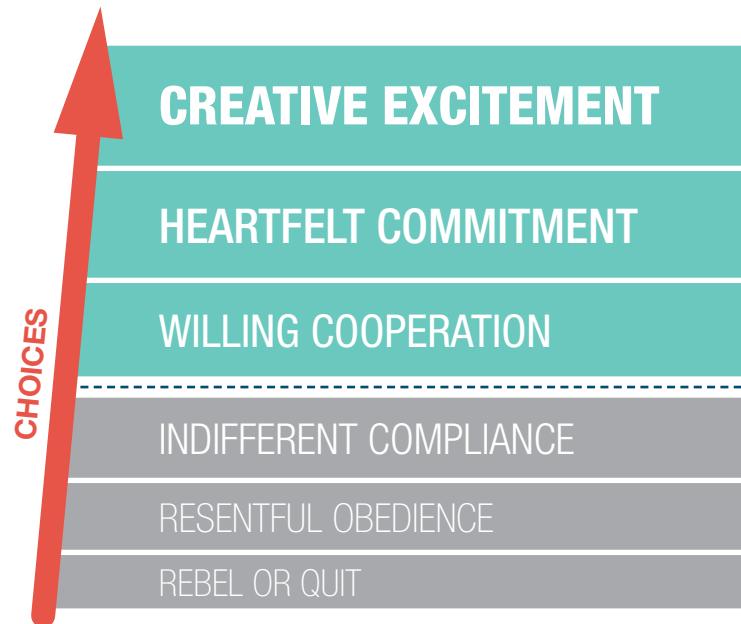
INSIGHTS

4 DRIVERS
of Engagement

Effective leaders create a culture where team members can say: **"I'm a valued member of a winning team doing meaningful work in an environment of trust."**
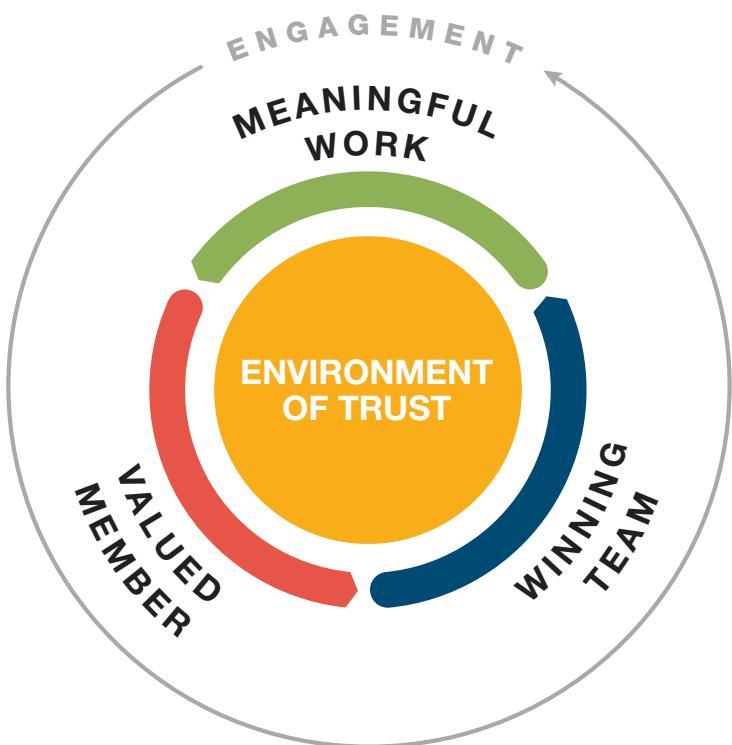
LEADERSHIP AND ENGAGEMENT

The 4 Drivers of Engagement reflect the 4 Essential Roles of Leadership.

RESULTS

CREATE VISION

COACH POTENTIAL

INSPIRE TRUST

EXECUTE STRATEGY

ENGAGEMENT

MEANINGFUL WORK

VALUED MEMBER

ENVIRONMENT OF TRUST

WINNING TEAM
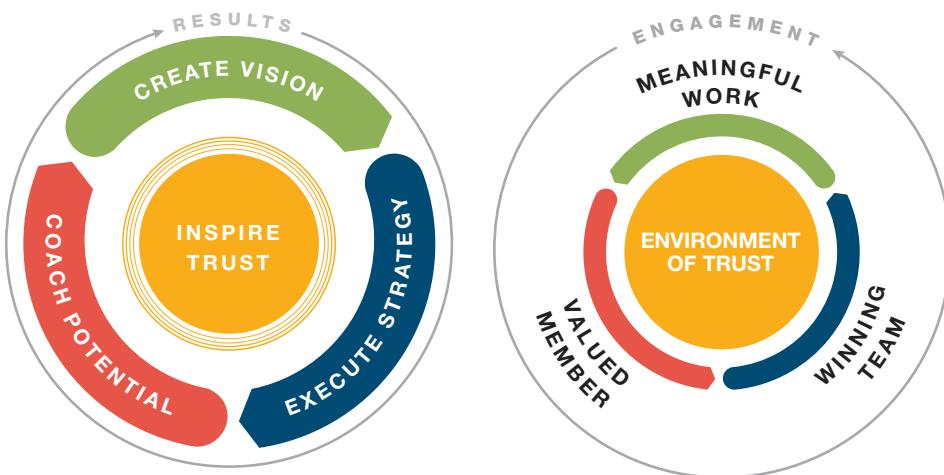
EVEREST

4 ESSENTIAL ROLES OF LEADERSHIP

WHO A LEADER IS AND WHAT A LEADER DOES

Effective leaders choose to consistently live four essential leadership roles. They:

- **Inspire Trust** by being models of character and competence.
- **Create Vision** by rallying their teams around an important purpose.
- **Execute Strategy** through consistent, focused discipline and alignment.
- **Coach Potential** by unleashing the talent and potential of...

1

GEMENT

...ture where eac...
...a valued membe...
...ningful work in a...

WHO A LEADER IS; WHAT A LEADER DOES

1. What kind of leader do you want to be?

2. What are your most important goals as a leader? What is your "Everest"?

"

I think leadership is inside **everyone**.

ERIK WEIHENMAYER

Review Your 4 Essential Roles of Leadership Assessment

Record your scores and take a moment to reflect on your strengths and opportunities to improve. What actions could you take?

INSPIRE TRUST	**"INSPIRE TRUST" SCORE**	
	My leadership strengths:	
	My opportunities for growth:	
	My insights from the feedback:	

CREATE VISION	**"CREATE VISION" SCORE**	
	My leadership strengths:	
	My opportunities for growth:	
	My insights from the feedback:	

"EXECUTE STRATEGY" SCORE	

My leadership strengths:

My opportunities for growth:

My insights from the feedback:

EXECUTE STRATEGY

"COACH POTENTIAL" SCORE	

My leadership strengths:

My opportunities for growth:

My insights from the feedback:

COACH POTENTIAL

Your Leadership Journey

Leadership can be learned—and sustained—with the right approach.

LEADERSHIP JOURNEY

PREPARE	LEARN AND PRACTICE	APPLY AND SUSTAIN
• Prework • Assessment	*The 4 Essential Roles of Leadership* Work Session **YOU ARE HERE**	• Implementation Plan • Implementation Tools • Online Resources • Accountability Partner

Leadership Implementation Plan

The Implementation Guide allows you to choose where you want to improve and provides a series of next steps for you to do individually and with your team after the work session.
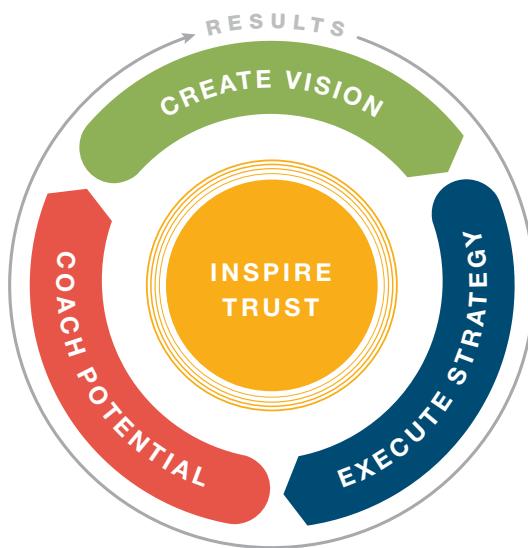
Credibility
Accelerator

Team Culture
Statement

Team Vision
and Strategy

Strategic
Narrative

Six Rights
Alignment Plan

4 Disciplines of
Execution® Process

Feedback
Approach

Coaching
Framework
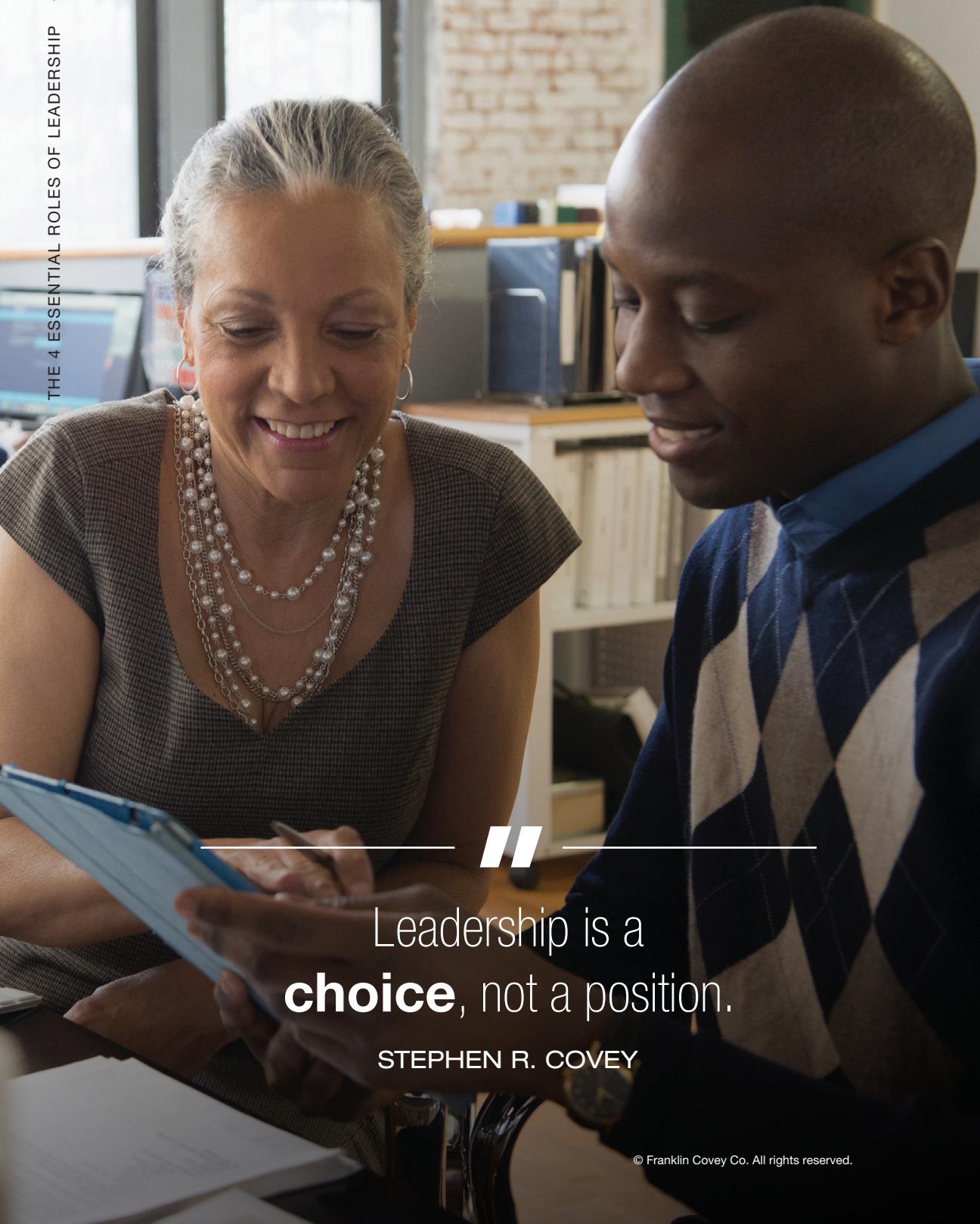
> Leadership is a **choice**, not a position.
>
> STEPHEN R. COVEY

NOTES

INSPIRE **TRUST**

How Can I Be a Leader Others Choose to Follow?

"

Trust is the most important ingredient for building a team.
Without trust, there's nothing.

PASQUALE SCATURRO

Inspire Trust

MOVING FROM
Leading a team where culture just happens.

TO
Leading a team where a high-trust culture is created intentionally from the inside out.

BY
1. Accelerating your credibility.

2. Clarifying your team culture statement.
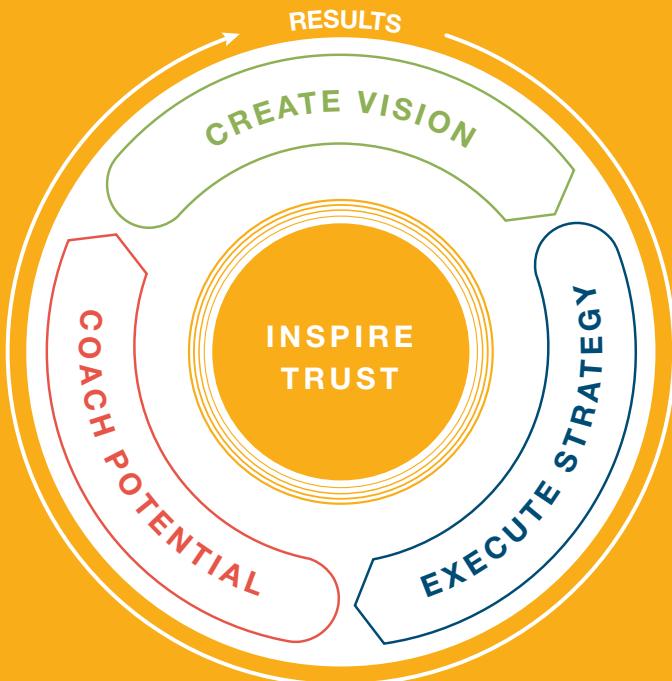
RESULTS
CREATE VISION
INSPIRE TRUST
EXECUTE STRATEGY
COACH POTENTIAL

LEADERSHIP IMPLEMENTATION PLAN

CREDIBILITY ACCELERATOR

TEAM CULTURE STATEMENT

ENGAGEMENT
MEANINGFUL WORK
ENVIRONMENT OF TRUST
WINNING TEAM
VALUED MEMBER

THE 4 CORES OF CREDIBILITY

> Trust is the **confidence** born of the **character** and **competence** of a person or an organization.
>
> STEPHEN M. R. COVEY

THE 4 CORES
of Credibility

Leaders shape culture from the inside out. Their personal credibility determines how others see them, interact with them and, ultimately, if they trust them.

There are 4 Cores of Credibility. Integrity and Intent are the foundations of Character. Competence is the result of Capabilities and Results. Leaders need to demonstrate all 4 Cores of Credibility to inspire trust.

RESULTS **4**

CAPABILITIES **3**

COMPETENCE

INTENT **2**

CHARACTER
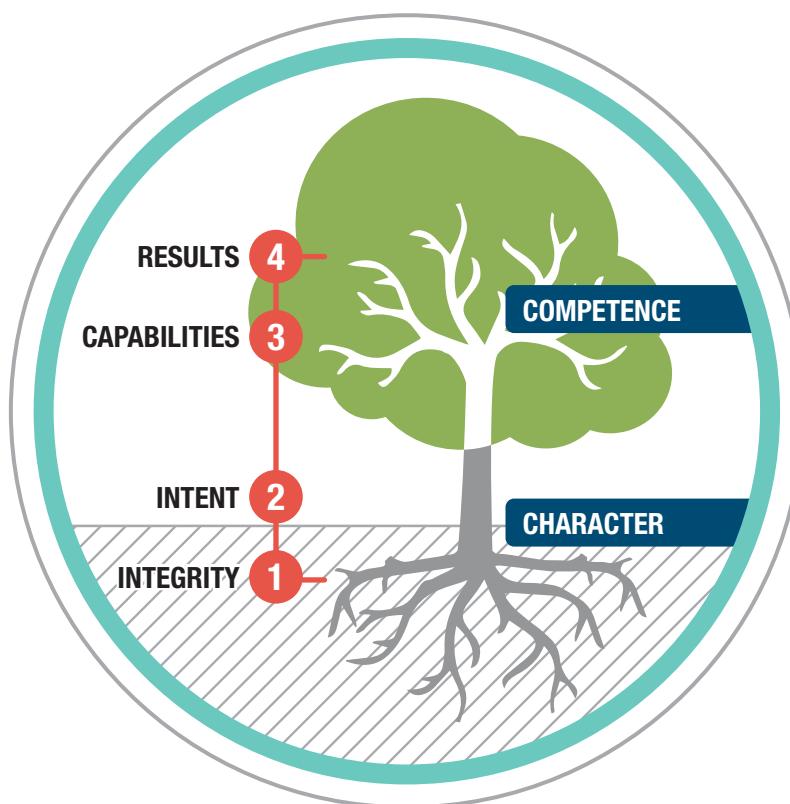
INTEGRITY **1**

INTEGRITY ACCELERATORS

Congruence

1. What are my most important two to three leadership values?

2. How do my actions and behaviors model these values?

VALUE	HOW WILL I MODEL IT?

VALUE	HOW WILL I MODEL IT?

VALUE	HOW WILL I MODEL IT?

INTEGRITY ACCELERATORS

INCREASING YOUR INTEGRITY

1 MAKE AND KEEP COMMITMENTS TO YOURSELF.
Treat commitments to yourself as you would treat commitments to other important people in your life. Make, keep, repeat.

2 STAND FOR SOMETHING.
Write a mission statement or personal credo—an expression of what you stand for. Then live by it.

3 BE OPEN.

INTEGRITY ACCELERATORS

Humility

1. Where does my ego tend to get in the way of doing the right thing? How could I think and behave differently in order to have more humility?

2. When, or with whom, do I always have to be right? How could I approach such situations differently?

3. Whom do I frequently disagree with? How could I be more accepting of his or her ideas?

Courage

1. What should I be advocating for that I am not? What do I need to stand up for and represent more boldly?

2. Where am I tolerating poor performance? What value does that violate? What could I do differently?

3. What are some of the "undiscussables" on my team that I need to address head on? What has stopped me from dealing with them in the past? How might I approach them differently today?

INTEGRITY ACCELERATORS

INCREASING YOUR INTEGRITY

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Write a mission statement or personal credo—an expression of what you stand for. Then live by it.

3 BE OPEN.

"

Courage doesn't always roar.
Sometimes **courage** is the little voice
at the end of the day that says **I'll try
again tomorrow**.

MARY ANNE RADMACHER

NOTES

INTENT ACCELERATORS

Motives

1. How does my team know I care about them? What can I do to be more transparent?

2. What does my behavior say about my motives? How could I be more motivated by the interests of my team?

3. How can I find out what is in my team's best interest? How will I act on it?

INTENT ACCELERATORS

IMPROVING YOUR INTENT

1 **EXAMINE YOUR MOTIVES.**
Ask yourself the "five whys." Once you
get close to your real intent, ask yourself
"Am I motivated only by self-interest or
the interests of all?"

2 **CHOOSE ABUNDANCE.**
Ask yourself: "Do I believe there are
enough rewards, credit, recognition, and
benefits for everyone's interests to be
served?"

3 **DECLARE**

CAPABILITIES ACCELERATORS

Talents, Attitudes, Skills, Knowledge, Style

RUN WITH MY STRENGTHS

1. What are my strengths and natural talents? How do I make my team complementary to balance out my weaknesses?

KEEP MYSELF RELEVANT

2. What are the demands or opportunities that are emerging in my role?

3. Where is my greatest risk for becoming irrelevant?

4. What skills or abilities do I need to develop to be relevant in the next five years?

KNOW WHERE I'M GOING

5. Where is my industry going?

6. What do I need to do to stay ahead of the curve?

CAPABILITIES ACCELERATORS

BUILDING YOUR CAPABILITIES

1   **RUN WITH YOUR STRENGTHS.**
    Feed your strengths. What are they? Where are your natural talents? What ca you do best? Starve your weaknesses b teaming with others who are strong whe you're weak.

2   **KEEP YOURSELF RELEVANT.**
    Match your strengths to opportunities. Where can you make a unique, high-valu contribution?

3   **KNOW**

RESULTS ACCELERATORS

Accelerate My Results

1. Am I achieving the results I was hired to achieve? If I had to apply for my job today, would I be hired again?

2. In what ways am I stagnating? In what ways could I stretch and grow? What do high standards look like for me and my team?

3. How will I know I've been successful? What have I learned from past failures that might be holding me back? What can I take from my past failures that could help me succeed now?

4. What can I do to stay strong when everything is on the line? How could I be more resilient? When am I most likely to give up? What key result do I need to achieve, even though it's very difficult?

ULTS ACCELERATORS

OVING YOUR RESULTS

TAKE RESPONSIBILITY FOR RESULTS.
Adopt a "results" mindset rather than an "activity" mindset. Ask yourself: "Will what I'm doing now lead to the results I want, or am I just staying busy?"

EXPECT TO WIN.
Openly express confidence in yourself and others. Clearly define what winning consists of. Create an emotional climate

Accelerate Your Credibility

Identify what you will continue, start, and stop doing to accelerate your credibility.

CONTINUE

START

STOP

CREATING TEAM CULTURE

Culture is:

- The collective behavior of people.
- The nature of their relationships.
- Shared language, norms, and systems.

Your Team Culture Statement

Imagine you have a team culture that is a reflection of your core values. What does that look like?

"

High-trust cultures are designed **intentionally**—from the inside out.

INSPIRE TRUST
Summary

Trusted leaders model the 4 Cores of Credibility.
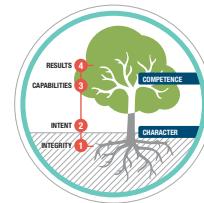
Effective leaders build a high-trust culture intentionally, from the inside out.

LEADERSHIP IMPLEMENTATION PLAN

 CREDIBILITY ACCELERATOR

 TEAM CULTURE STATEMENT

Implementation Guide page 17

NOTES

The **culture** of any organization is simply the collective behavior of its leaders. If you want to **change** your culture, change the collective behavior of your **leaders**.

RAM CHARAN

CREATE **VISION**

How Is Our Team's Work Relevant?

"

Leadership is about change. It's about taking people from where they are now to where they need to be. The best way to get people to venture into the unknown terrain is to make it desirable by taking them there in their imaginations.

NOEL M. TICHY

Create Vision

MOVING FROM

Managing people to a job description.

TO

Engaging your team in meaningful work.

BY

1. Crafting a team vision statement.

2. Drafting a team strategy.

3. Practicing a strategic narrative.
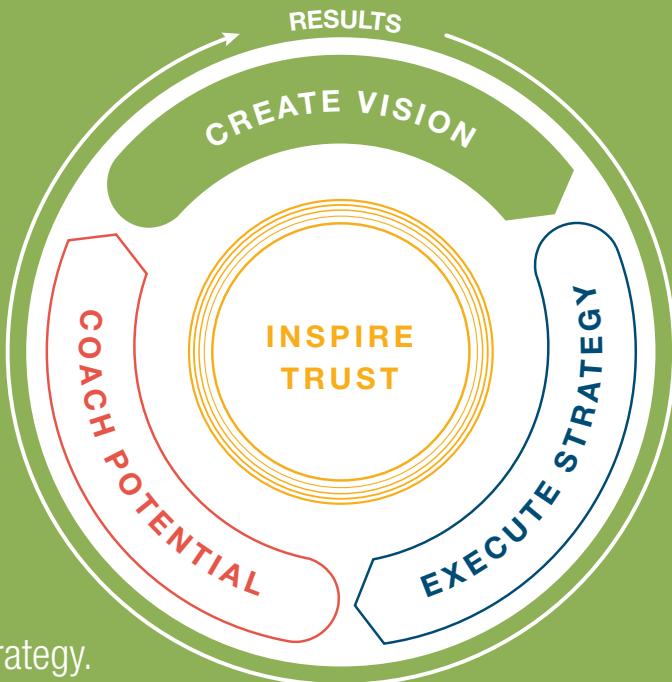
RESULTS

CREATE VISION

INSPIRE TRUST

COACH POTENTIAL

EXECUTE STRATEGY

LEADERSHIP IMPLEMENTATION PLAN

TEAM VISION AND STRATEGY

STRATEGIC NARRATIVE

ENGAGEMENT

MEANINGFUL WORK

ENVIRONMENT OF TRUST

VALUED MEMBER

WINNING TEAM

MISSION, VISION, AND STRATEGY

Mission: Why we exist.

Vision: Where we are going.

Strategy: How we are going to get there.

| ORGANIZATION |
| Mission, Vision, & Strategy |

| TEAM A | YOUR TEAM | TEAM B |
| Vision & Strategy | Vision & Strategy | Vision & Strategy |

Engage Your Team

When developing your team vision and strategy, start
with your own creativity, analysis, and planning to set the
groundwork. Then engage your team's creativity, feedback,
and involvement to make it come alive.

YOUR CREATIVITY, ANALYSIS, AND PLANNING

YOUR TEAM'S CREATIVITY, FEEDBACK, AND INVOLVEMENT
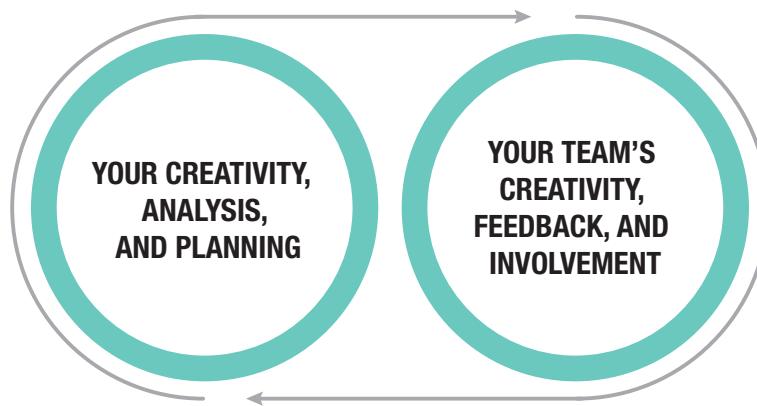
> **"**
>
> If a **clear** and **compelling** **purpose** exists, people will volunteer their best efforts.
>
> STEPHEN R. COVEY

TEAM VISION

Effective leaders create a vision of where they are going and why. They are able to link to an aspirational purpose that inspires people to think bigger and find meaning in their work, especially during difficult times or change.

Inspiring team visions:

- Are aspirational.
- Require us to think BIG and stretch.
- Can be measured.
- Link to the organizational vision.

6

VISION

YOU KNOW WHERE YOU'RE GOING?

ctive leaders create a vision of where they
going and why. They are able to link to an
irational purpose that inspires people to think
ger and find meaning in their work, especially
ring difficult times or change.

INSPIRING TEAM VISIONS:
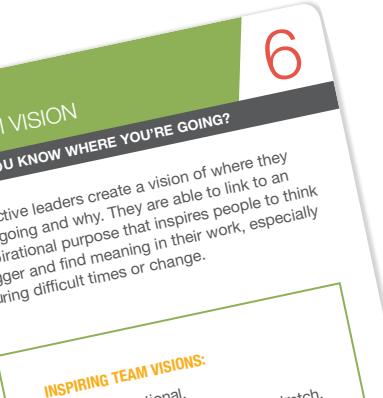
THE POWER OF AN INSPIRING VISION

MOONSHOT

VISION:

Put a man on the moon by the end of the decade and bring him safely home.

Team Vision Statement   EXAMPLES

EVEREST TEAM

Inspire people everywhere to overcome challenges and live a life without barriers.

COPA AIRLINES, BAGGAGE-HANDLING TEAM

Be the most reliable baggage-handling team in Latin America.

NOT-FOR-PROFIT COMMUNITY CRISIS-RESPONSE TEAM

We give the gift of hope and provide relief in the midst of crisis.

PUBLIC-UNIVERSITY SUSTAINABILITY OFFICE, RECYCLING TEAM

To be a model of sustainable practices to our campus and the world.
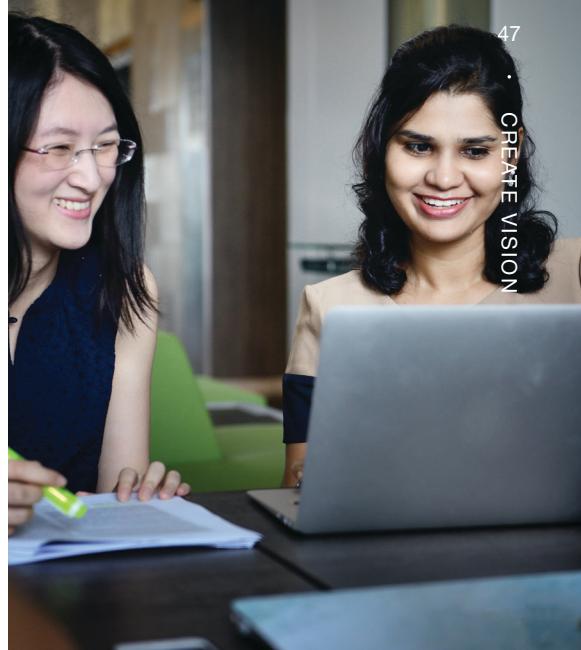
REGIONAL HEALTH DEPARTMENT, DATA AND BIO-STATISTICS TEAM

Provide robust data to our allied teams so they can educate our citizens to make our communities safe and enjoyable.

GLOBAL MANUFACTURER, PRODUCTION TEAM

Be the number-one partner of choice in the home-building construction safety-equipment market.

Draft Team Vision Statement

Answer the following questions to draft your team vision statement:

- Prework: Consider your organization's mission and vision. What are the significant contributions only my team can make to achieve them?

- Think BIG. If my team could make one extraordinary contribution over the next one to five years, what would it be?

- If my team dissolved, what impact would that have on the organization?

THE POWER OF AN EFFECTIVE STRATEGY

COPA AIRLINES

VISION:

To be the best connecting airline in Latin America for passengers.

STRATEGY:

To be on time. That means all preflight paperwork is completed and all bags, food, and passengers are on board.

THE 4 ESSENTIAL ROLES OF LEADERSHIP

"

...when the world **changes** around you and when it changes against you... you have to **lean into that** and figure out what to do because complaining isn't a strategy.

JEFF BEZOS, CEO, AMAZON

TEAM
Strategy

—

No team has an inherent right to exist. A relevant team strategy incorporates the organizational strategy, meets customer and other stakeholder needs, builds on your team capabilities, relates to the wider context, and brings meaningful impact to the bottom line.

CUSTOMERS

CAPABILITIES

TEAM
STRATEGY

CONTEXT

BOTTOM
LINE

TEAM STRATEGY

ARE YOU RELEVANT?

A relevant team strategy details how you ma
your team's work relevant.

CUSTOMERS

CAPABILITIES

TEAM

RELEVANT TEAM STRATEGY **EXAMPLE**

Explore how to increase your team's relevance. Use the resources on pages 56–63.

CUSTOMERS' NEEDS

Who are your most important internal and external customers? What do they want or need from you? See pages 56–57.

Passengers: Fast baggage retrieval; no lost or damaged bags.

Customer-Service Agents: Partners who solve problems as well as

deliver on time; high levels of service expected.

Freight: Accurate loading and delivery; on-time arrival.

TEAM CAPABILITIES

What does your team do best? Where are the gaps?
See pages 58–59.

Our historical strength is in loading and unloading bags without damage.

We need to focus on new tracking-system and security procedures.

We could measure our efficiency better so that we can improve our

baggage-retrieval times.

STRATEGIC CONTEXT

What organizational strategies do you need to link to? What other factors do you need to understand and consider? See pages 60–61.

Competitor airlines have focused on on-time departures with success.

Larger U.S. and European airlines have entered the Latin American market.

New booking system speeds bag tracking.

Changes in government regulations require additional security checks.

Economic growth means people are willing to spend more to be on time.

More people are bringing carry-on bags.

BOTTOM LINE

How does your team add value? How do you impact the bottom line? See pages 62–63.

The faster we can turn around an aircraft and put it in the air, the more the company's profit margins increase.

The faster we get every bag on the plane, the faster we can get the plane turned around.

Significant reductions in lost bags saves money.

Customer satisfaction is tied to 100 percent on-time baggage arrivals.

RELEVANT TEAM STRATEGY

Explore how to increase your team's relevance. Use the resources on pages 56–63.

CUSTOMERS' NEEDS

Who are your most important internal and external customers? What do they want or need from you? See pages 56–57.

TEAM CAPABILITIES

What does your team do best? Where are the gaps?
See pages 58–59.

STRATEGIC CONTEXT

What organizational strategies do you need to link to? What other factors do you need to understand and consider? See pages 60–61.

BOTTOM LINE

How does your team add value? How do you impact the bottom line? See pages 62–63.

CUSTOMER-NEEDS ANALYZER

Answer the following questions to determine your customers' needs.

1. What are your customers' most difficult struggling moments?

2. What creative solutions could your team provide if your customers only knew to ask?

3. How can your team make it easier for your customers to work with you?

4. What outcomes do your customers want from your team? How do you know?

#1 rule of customer loyalty:
"Make it easy for me to do business with you."

BLAKE MORGAN

CUSTOMER-NEEDS INTERVIEW

To gain greater insight into your customers' needs, ask them these questions.

1. What are your most important goals? What is the impact of achieving them?

2. What challenges are you trying to solve? Which is most important?

3. What has prevented you from achieving these goals or solving these challenges before now?

4. What could my team do to make it easier for you to work with us?

5. What else do we need to know? What questions should we be asking you?

TEAM-CAPABILITIES ANALYZER

Assess your team's core capabilities and relevance.

INITIALS	RIGHT POSITION? WHY?/WHY NOT?	NEXT STEPS FOR THIS PERSON

Answer the following questions to determine your team's capabilities.

1. What is unique and distinctive about your team?

2. Does your team lack some critical skills or capabilities needed to perform with excellence? If so, what are they?

3. If you questioned on the previous page whether a person was in the right position, what has happened recently that has made you feel this way? Is there anything you haven't done?

4. Does the team have any empty spots? Are any key roles (currently existing or not) not filled? If so, which ones?

5. Are there people on your team who have strengths that complement your areas of weakness? Who are they and what strengths do they bring?

6. Who could take your place?

STRATEGIC-CONTEXT ANALYZER

1. What organizational strategies are relevant to your team and why?

2. Identify the most relevant large-scale forces that impact your team. Use the list below to generate ideas. On the following page, describe the impact and how your team will respond.

CONTEXTUAL FORCES

- Leadership changes
- Budget issues
- Merger, acquisition, or reorganization
- Legislative changes
- Competitor moves
- Industry dynamics (consolidation, fragmentation, etc.)
- Customer trends
- Business-model changes

- Supplier dynamics
- Macroeconomic forces (interest rates, etc.)
- Disruptive technologies
- Labor relations
- Demographic trends
- Globalization
- Other

CONTEXTUAL FORCE

IMPACT	OUR TEAM'S RESPONSE

CONTEXTUAL FORCE

IMPACT	OUR TEAM'S RESPONSE

CONTEXTUAL FORCE

IMPACT	OUR TEAM'S RESPONSE

BOTTOM-LINE ANALYZER

Building Blocks

BUILDING BLOCK	DEFINITION
CASH	Cash is money in the bank. Cash flow is the difference between all the money that flows in and all the money that flows out in any given time period.
MARGIN	Margin is the money left over after paying expenses. To improve margin, you can increase revenue, decrease costs, or both.
VELOCITY	Velocity means speed—how fast and how hard you make your assets work to earn more money. Decreasing cycle time, increasing inventory turnover, and increasing employee productivity are examples of velocity.
GROWTH	Growth measures whether the organization is producing more or getting larger. Growth must be profitable and sustainable.

Identify how your team impacts each building block directly or indirectly. Be specific and use examples.

BUILDING BLOCK	HOW DOES YOUR TEAM IMPACT THIS BUILDING BLOCK?
CASH How does your team increase the organization's ability to generate cash?	
MARGIN How can your team reduce expenses or save the organization money?	
VELOCITY How does your team improve the speed of business for the organization?	
GROWTH How does your team directly or indirectly affect the organization's ability to grow profitably and sustainably?	

Team Strategy **EXAMPLES**

NOT-FOR-PROFIT COMMUNITY CRISIS-RESPONSE TEAM

We develop and maintain open and collaborative relationships with health providers, local governments, religious communities, and community groups so that we are able to effectively coordinate our crisis-response efforts and reach the most vulnerable people in times of need.

EVEREST TEAM

Get every person to the top and safely home by:

- Assembling the right team.
- Rigorous training.
- Open communication.
- Assessing and adapting quickly.
- No ego.

COPA AIRLINES, BAGGAGE-HANDLING TEAM

Follow a detailed plan to quickly and accurately unload and load every plane within 30 minutes, using technology and ingenuity to consistently improve our processes.

PUBLIC UNIVERSITY SUSTAINABILITY OFFICE, RECYCLING TEAM

Increase the use of sustainability practices through increased visibility, clear branding, and recognition of progress at every campus.

GLOBAL MANUFACTURER, PRODUCTION TEAM

We will produce a new range of lower-cost safety equipment developed using proprietary materials and customer-led innovation and increase safety-equipment use in developing markets.

REGIONAL HEALTH DEPARTMENT, DATA AND BIO-STATISTICS TEAM

We attract and retain a superior data-collection corps and provide them regular training. We participate in collaborative division-wide strategic planning to ensure we collect the data our allied teams—and our community— need.

Draft Your Team Strategy

Review your answers on pages 54–55 and draft your team strategy.

QUESTIONS TO CONSIDER:
What do we do? For whom? In what context? To achieve what results?

YOUR TEAM STRATEGY

How will you measure your strategy? How will you know you've achieved it?

STRATEGIC NARRATIVE

Your strategic narrative should be so clear that you can communicate it—and others can understand it—in 30 seconds or less.

"

Most leaders **undercommunicate** the vision by a factor of 10X to 100X.

JOHN KOTTER

NARRATIVE
Imperatives

—

An effective strategic narrative is **clear**; it is specific and unambiguous. It is **concise**—short and to the point. It is **compelling**, meaningful, and inspirational. And it is **confident**, which means it's positive and believable.
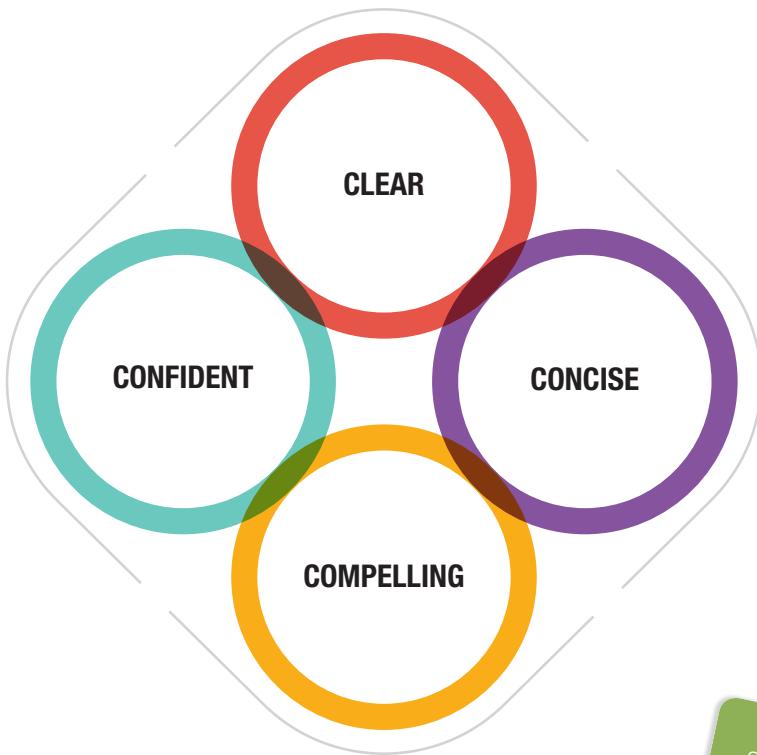
Strategic-Narrative Builder

What is the impact for
your organization and for
others you serve?

What are key
phrases, mottos,
stories?

What would the
headline be?

**STRATEGIC-
NARRATIVE
BUILDER**

How will
members of your
team benefit?

How can you frame
this positively?

What are some of the
challenges your strategy
will overcome?
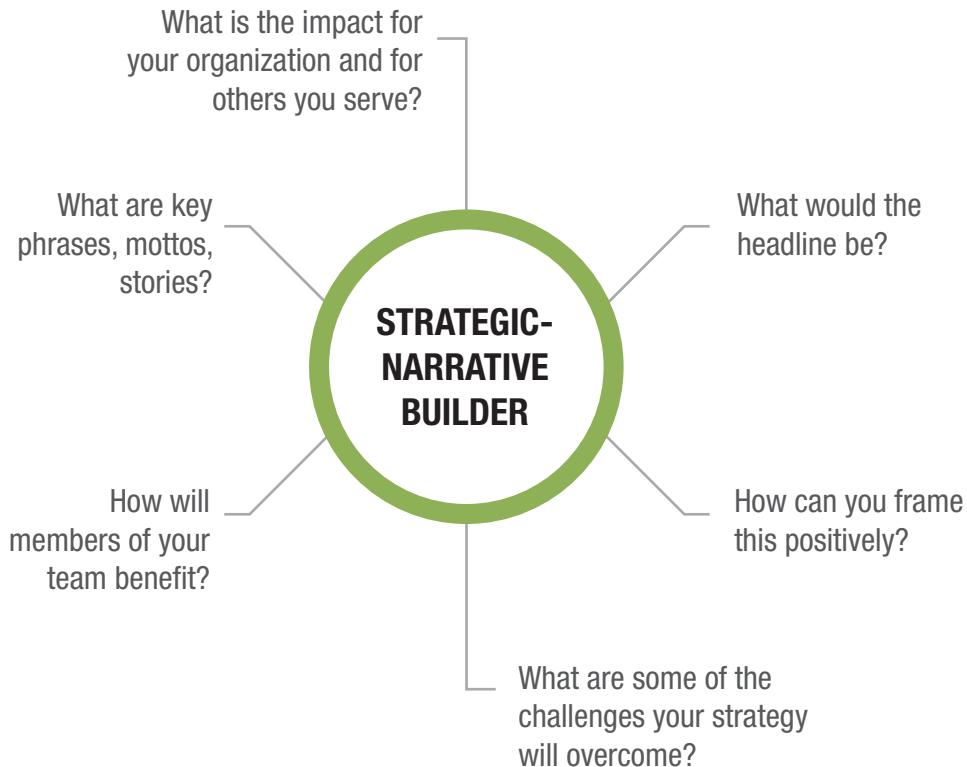
Use the questions on page 70 to identify words and phrases you can use to communicate your team strategy.

STRATEGIC-NARRATIVE BUILDER

Craft Your Strategic Narrative

Draft your strategic narrative below.

Who needs to hear your message?

1.

2.

3.

4.

CREATE VISION
Summary

An inspiring team vision explains where you're going and gives meaning to the team's work.

A relevant strategy explains how you will get there and connects to key stakeholder needs.

Your strategic narrative becomes the clear, concise, compelling, and confident story you frequently share to gain others' support and commitment.

LEADERSHIP IMPLEMENTATION PLAN

TEAM VISION AND STRATEGY

STRATEGIC NARRATIVE

Implementation Guide page 27

NOTES

EXECUTE
STRATEGY

How Can We Make It Easier to Get the Results We Want?

There are always more good ideas than capacity to execute.

CHRIS MCCHESNEY

Execute Strategy

MOVING FROM

Thinking success comes from the strategy.

TO

Knowing that enduring success is in the systems.

BY

1. Aligning the Six Rights.
2. Implementing the 4 Disciplines of Execution®.

RESULTS

CREATE VISION

INSPIRE TRUST

COACH POTENTIAL

EXECUTE STRATEGY

LEADERSHIP IMPLEMENTATION PLAN

SIX RIGHTS ALIGNMENT PLAN

4 DISCIPLINES OF EXECUTION® PROCESS

ENGAGEMENT

MEANINGFUL WORK

ENVIRONMENT OF TRUST

VALUED MEMBER

WINNING TEAM
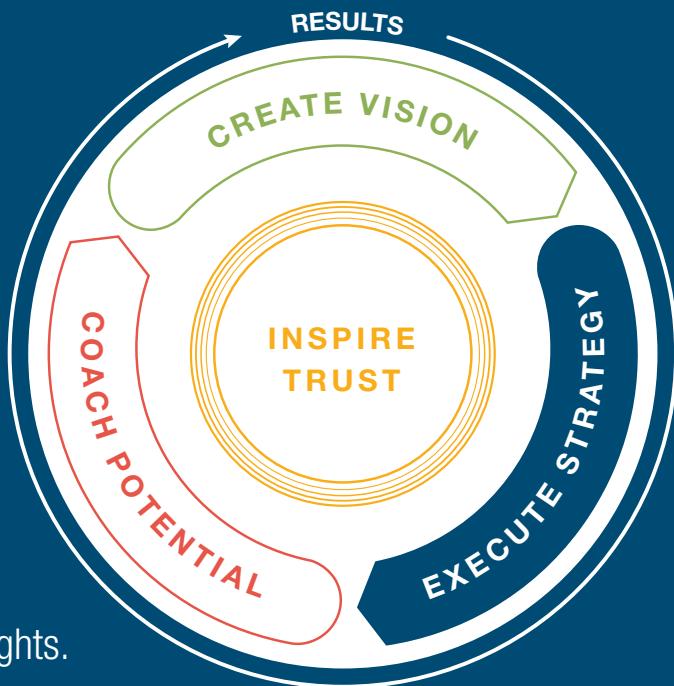
WHAT IS A SYSTEM?

A system is a process, method, or set of procedures for achieving something.

A GREAT SYSTEM:

- Is aligned to achieve what's most important.
- Makes it easier to get work done.
- Operates independently of the leader.
- Endures beyond the leader.

The devil is in the details.
Success is in the **systems**.

J. W. MARRIOTT

THE SIX
Rights

—

Effective leaders make it easier to achieve results by aligning the Six Rights.

To do this, we need the right people in the right roles. We need the right structure. We need to reward the right behaviors. We ensure the right resources are in place, and that people are equipped to make the right decisions, with the right work processes.

PEOPLE

STRUCTURE

PROCESSES

ALIGNMENT

REWARDS

DECISIONS

RESOURCES
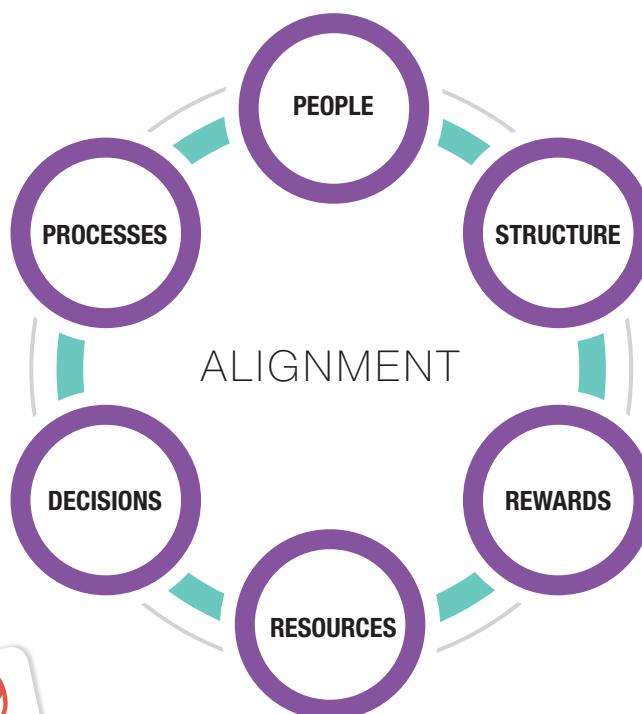
ALIGN THE SIX RIGHTS

"

All organizations are **perfectly aligned** to get the **results** they get.

ARTHUR W. JONES

SIX RIGHTS MAP EXAMPLE

Review the Six Rights. Identify what's working and what changes need to be made to align these systems with your strategy.

RIGHT PEOPLE
Do we have the right people, with the right skills, doing the right work?

- *Refine hiring profile to measure strong technical skills and high emotional intelligence.*
- *Hire experienced Training and Development leader to create common-culture initiative and improve on-boarding process.*

RIGHT STRUCTURE
Do we have the right roles and responsibilities in place for the right people to work together?

- *Build open-space work areas. No individual offices or office doors. Open-style seating. No defined individual work space.*
- *Ensure food vendor meets quality and cost standards. Establish employee oversight for hiring and quality control.*

RIGHT REWARDS
Are people compensated, recognized, and rewarded in the right way to help our team achieve its strategy?

- *Finalize signing bonuses for key talent. Socialize profit-sharing program.*
- *Communicate flexible working arrangements.*
- *Develop team to build employee-recognition program.*
- *Empower employee-led groups for sustainability and corporate giving.*
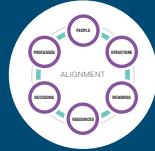
RIGHT RESOURCES

Do we have the right tools, budget, technology, time, and other necessary resources to succeed?

- *Ensure all team members have access to two monitors and ergonomic furniture.*

- *Allocate additional budget for Six Sigma initiative.*

RIGHT DECISIONS

Are the right decisions being made by the people closest to the work?

- *Establish advisory team to identify which decisions can be made by frontline employees.*

- *Empower frontline employees to make essential migration decisions within 24 hours.*

RIGHT PROCESSES

Are the core work processes aligned to support the strategy in the right way? Do they make it easier to get the most important work done?

- *Hire Continuous Improvement (CI) leader.*

- *Establish Lean Six Sigma process and 4DX for execution.*

SIX RIGHTS MAP

Review the Six Rights. Identify what's working and what changes need to be made to align these systems with your strategy.

RIGHT PEOPLE

Do we have the right people, with the right skills, doing the right work?

RIGHT STRUCTURE

Do we have the right roles and responsibilities in place for the right people to work together?

RIGHT REWARDS

Are people compensated, recognized, and rewarded in the right way to help our team achieve its strategy?
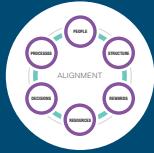
RIGHT RESOURCES
Do we have the right tools, budget, technology, time, and other necessary resources to succeed?

RIGHT DECISIONS
Are the right decisions being made by the people closest to the work?

RIGHT PROCESSES
Are the core work processes aligned to support the strategy in the right way? Do they make it easier to get the most important work done?

SIMPLE, VISIBLE, AND CONSISTENT

REFLECTION

Review your vision, strategy, and Six Rights Map.

- What additional insights do you have?
- How can you share them in ways that inspire trust?

URGENT VS. IMPORTANT

The "whirlwind" feels urgent. It is all the day-to-day work we do just to keep the doors open. We can't ignore it, yet it gets in the way of achieving our most important goals. Our future success depends on our ability to proactively carve out time for these goals in the midst of the whirlwind.

"
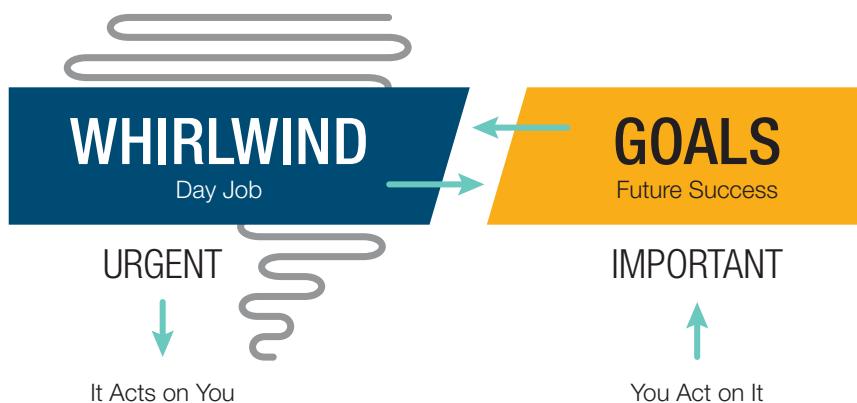
Most of us spend too much time on what is **urgent**, and not enough on what is **important**.

STEPHEN R. COVEY

THE 4 DISCIPLINES OF EXECUTION® (4DX®)

Achieve Your **Wildly Important Goals**®

Discipline 1: Focus on the Wildly Important

Discipline 2: Act on the Lead Measures

Discipline 3: Keep a Compelling Scoreboard

Discipline 4: Create a Cadence of Accountability

THE 4 DISCIPLINES OF EXECUTION

"

The real problem isn't executing your goals, it's executing your goals in the **midst of the whirlwind**.

CHRIS MCCHESNEY

DISCIPLINE 1:
FOCUS ON THE WILDLY IMPORTANT

Discipline 1 is the discipline of focus.

It's about putting your finest efforts on the one or two goals that will make all the difference, instead of giving mediocre effort to many. There will always be more good ideas than there is capacity to execute.

The key to achieving results starts with narrowing the focus.

NUMBER OF GOALS	2–3	4–10	11–20
GOALS ACHIEVED WITH EXCELLENCE	2–3	1–2	0
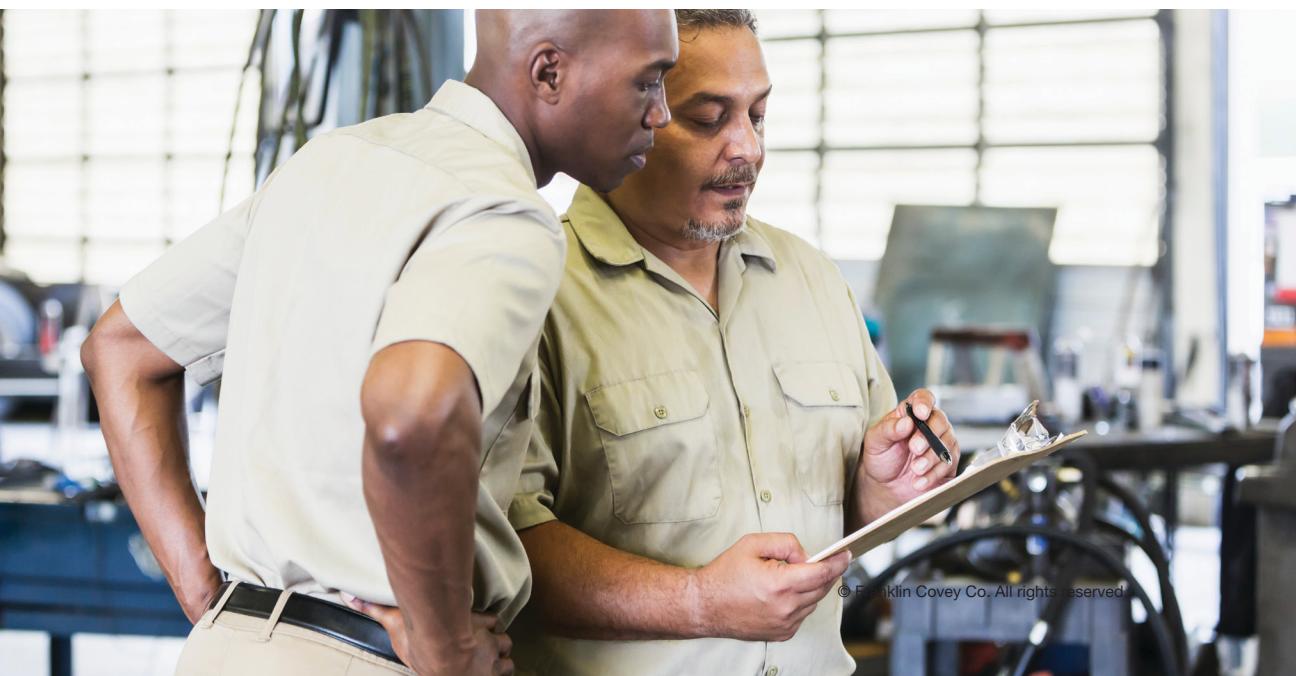
FOCUS ON THE WILDLY IMPORTANT

RULES FOR DISCIPLINE 1:

- Choose a WIG that represents the most critical gap.
- The WIG should represent only one aspect of the team's work.
- Only one WIG per person at the same time.
- Create a clear starting line, finish line, and deadline ("From X to Y by When").

THE 4 DISCIPLINES OF EXECUTION®
DISCIPLINE 1

FOCUS ON THE WILDLY IMPORTANT

Discipline 1 is the discipline of focus. It's ab
putting your finest efforts on the one or two
goals that will make all the difference.
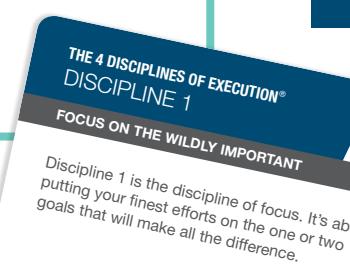
Identify Potential WIGs

Review your vision on page 48 and strategy on page 66. Brainstorm some potential goals that could help you achieve your strategy.

Things to consider include current goals, gaps to close, required changes, and needed progress.

Plot Potential WIGs®

VERY IMPORTANT

NO GAP - BIG GAP

NOT IMPORTANT

Craft Your Team WIG

Write your WIG in a sentence.

DRAFT WIG ("From X to Y by When")

Why does this WIG matter so much? What is the impact of achieving it?

SALES TEAM

Increase new client sales of existing product line from $1M to $1.4M by Dec. 31.

DISCIPLINE 2:
ACT ON THE LEAD MEASURES

Discipline 2 is the discipline of leverage.

It's about applying disproportionate energy to the behaviors and activities that lead to, or predict, achieving your WIG.

Lead measures are different from lag measures. While lag measures tell you if you have achieved the goal, a lead measure tells you if you are *likely* to achieve the goal. Lead measures are predictive and influenceable.

LAG MEASURES	LEAD MEASURES
• Come after the fact. • Tell us if we have achieved the goal.	• Are predictive. • Are influenceable. • Can be difficult to measure.

ACT ON THE LEAD MEASURES

LEAD-MEASURE CHECK:

1. Is it predictive of WIG success?

2. Can it be influenced by the team?

3. Is it a chronically inconsistent behavior or activity?

THE 4 DISCIPLINES OF EXECUTION®
DISCIPLINE 2

ACT ON THE LEAD MEASURES

Discipline 2 is the discipline of leverage. It's about applying disproportionate energy to the behaviors and activities that lead to, or predict achieving your WIG.

INFLUENCEABLE
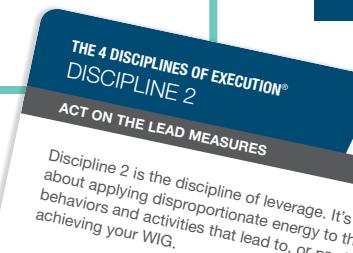
Identify Potential Lead Measures

Brainstorm the behaviors and activities that could help you achieve your WIG.

**WIG
(LAG MEASURE):**

**LEAD
MEASURES:**

SALES TEAM
Increase new client sales of existing product line from $1M to $1.4M by Dec. 31.

1. Hold 10 face-to-face client meetings per week.

2. Submit three proposals to qualified clients every week.

Plot Potential Lead Measures

HIGHLY PREDICTIVE

NOT INFLUENCEABLE

HIGHLY INFLUENCEABLE

NOT PREDICTIVE
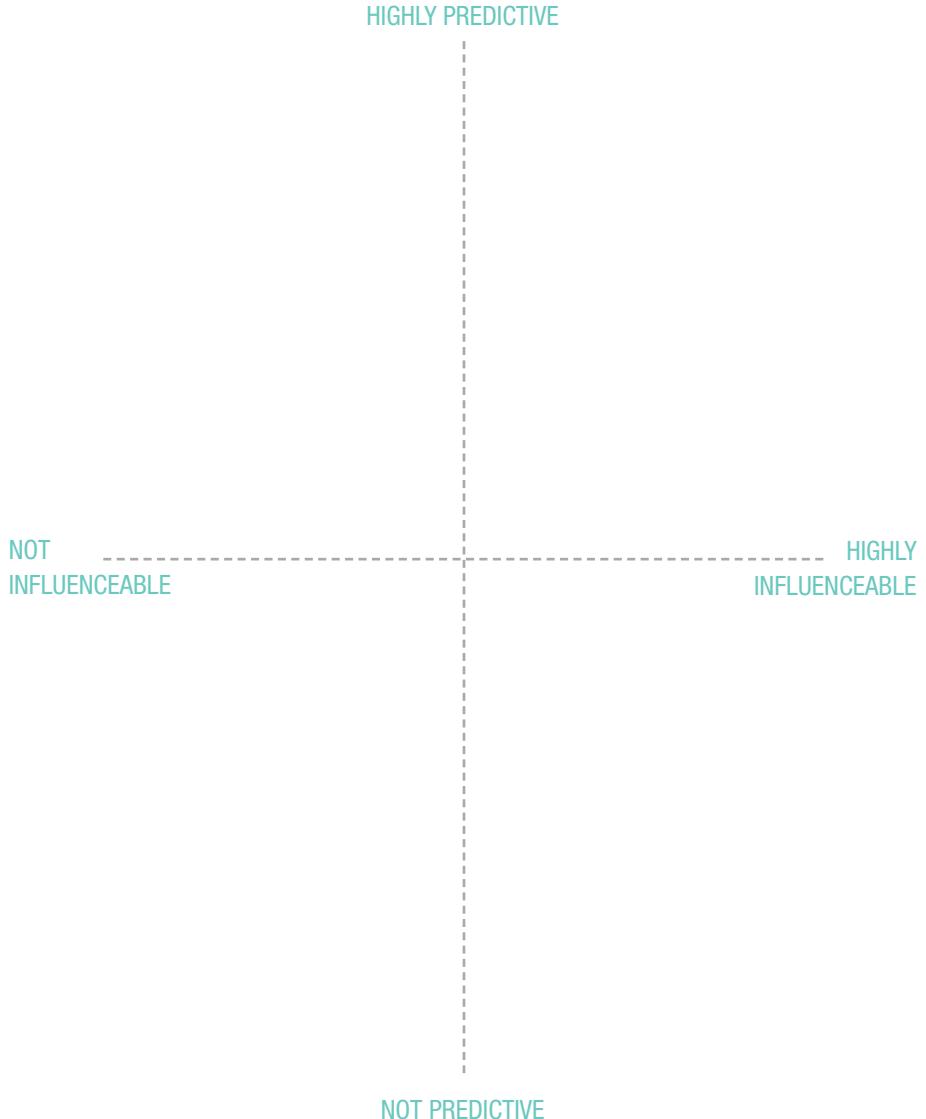
Craft Your Lead Measures

POTENTIAL LEAD MEASURE 1:

DRAFT LEAD MEASURE 1
Make it specific and measurable.

POTENTIAL LEAD MEASURE 2:

DRAFT LEAD MEASURE 2
Make it specific and measurable.

Lead-Measures Check

Test your lead measures. Answer these questions for each lead measure:

1. Is it predictive of WIG success?

2. Can it be influenced by the team?

3. Is it a chronically inconsistent behavior or activity?

	PREDICTIVE	INFLUENCEABLE	CHRONICALLY INCONSISTENT
Lead Measure 1			
Lead Measure 2			

Identify how you will gather your lead-measure data.

DISCIPLINE 3:
KEEP A COMPELLING SCOREBOARD

Discipline 3 is the discipline of measurement.

A scoreboard ensures everyone knows the score at all times, so that they can tell whether or not they are winning.

COMPELLING SCOREBOARDS
• Are simple.
• Are highly visible to the players.
• Have the right lead and lag measures.
• Tell us immediately if we are winning or losing.

KEEP A COMPELLING SCOREBOARD

Create a **players'** scoreboard,
not a coach's scoreboard.

THE 4 DISCIPLINES OF EXECUTION®
DISCIPLINE 3

KEEP A COMPELLING SCOREBOARD

Discipline 3 is the discipline of measurement.
scoreboard ensures that everyone knows whe
or not they are winning. Compelling scorebo
track both the WIG (lag) and lead measures.

WIG (LAG MEASURE)
New client sales: $1M
to $1.4 by Dec 31.

1.0   1.1   1.2   1.3

Scoreboard · EXAMPLE

The scoreboard is for the **whole team**. It needs to show both **lag** and **lead data**.

WIG (LAG MEASURE)

New client sales: $1M to $1.4M by Dec 31.

X

Y

1.0   1.1   1.2   1.3   1.4
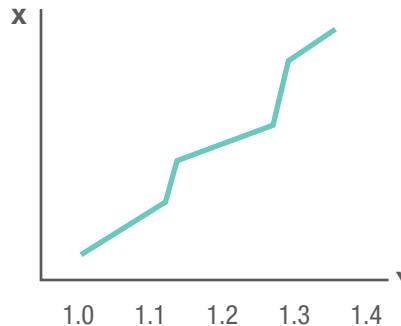
LEAD MEASURE

10 F2F client mtgs/week.

100%

Week 1   2   3   4   5   6
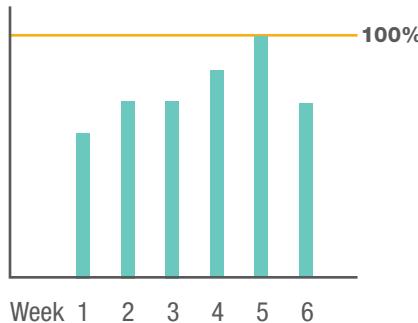
LEAD MEASURE

Submit 3 proposals/wk.

100%

Week 1   2   3   4   5   6
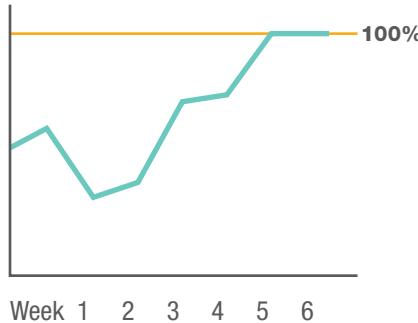
> "
> People play differently when **they** are keeping score.

MCCHESNEY, COVEY, HULING
THE 4 DISCIPLINES OF EXECUTION

DISCIPLINE 4:
CREATE A CADENCE OF ACCOUNTABILITY

Discipline 4 is the discipline of accountability.

It requires a weekly cycle of accounting for past performance and planning to move the score forward. Discipline 4 connects team members to how they, personally, will achieve the goal.

Leaders and team members have different responsibilities during the WIG Session.

TEAM MEMBERS	LEADERS
1. Report on last week's commitments. 2. Review and update the scoreboard. 3. Make commitments for next week.	1. Review the scoreboard. 2. Clear the path. 3. Recognize performance.

CREATE A CADENCE OF ACCOUNTABILITY

KEY QUESTION:

What are the **one or two most important** things I can do this week that will have the biggest impact on the scoreboard?

THE 4 DISCIPLINES OF EXECUTION®
DISCIPLINE 4

CREATE A CADENCE OF ACCOUNTABILITY

Discipline 4 is the discipline of accountabilit
requires a weekly recurring cycle of account
for past performance and planning to move t
score forward.

ACCOUNT
REPORT ON COMMITMENTS.

1
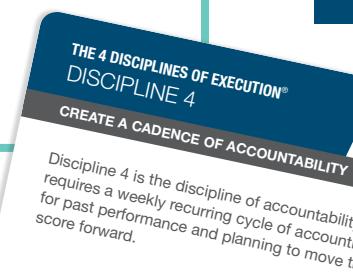
WIG Sessions

The WIG Session establishes your **weekly rhythm** of accountability for driving progress toward the WIG. It is one of the most important tools a leader has to empower his or her team to achieve success.

ACCOUNT
REPORT ON COMMITMENTS.

1

2

**REVIEW
SCOREBOARD**
LEARN FROM SUCCESSES
AND FAILURES.

3

PLAN
CLEAR THE PATH AND
MAKE COMMITMENTS.

WIG (LAG MEASURE):	LEAD MEASURES:	WEEKLY COMMITMENTS:
SALES TEAM Increase new client sales of existing product line from $1M to $1.4M by Dec. 31.	1. Hold 10 face-to-face client meetings per week.	1. Follow up with 19 client contacts to schedule F2F meetings.
	2. Submit 3 proposals to qualified clients every week.	2. Customize the standard proposal to reflect the new marketing promotion.

EXECUTE STRATEGY
Summary

Great leaders ensure that the Six Rights align to their vision and strategy to make it easier for the team to produce the right results.
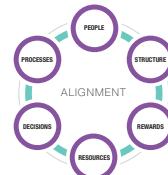
The 4 Disciplines of Execution is a repeatable process to help every team focus on and execute their most important goals.

LEADERSHIP IMPLEMENTATION PLAN

SIX RIGHTS ALIGNMENT PLAN

4 DISCIPLINES OF EXECUTION® PROCESS

Implementation Guide page 41

NOTES

COACH
POTENTIAL

How Do I Build Leadership in Others?

The best leaders are the best coaches. They challenge us all to step into the realm of possibility and opportunity.

MARIA "SULLY" SULLIVAN

Coach Potential

MOVING FROM

Solving problems by telling others what to do.

TO

Developing other leaders and building team members' capacity.

BY

1. Using the feedback approach.
2. Practicing key coaching skills.
3. Implementing the Coaching Framework.
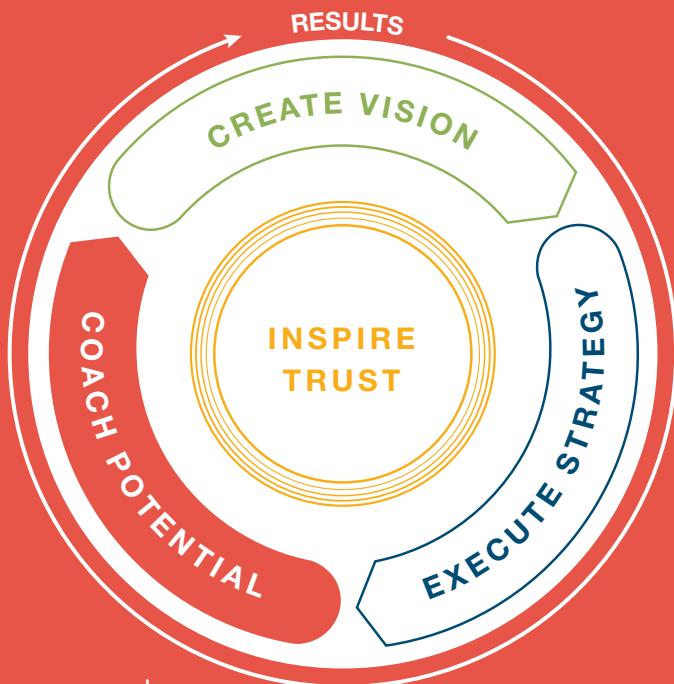
RESULTS

CREATE VISION

INSPIRE TRUST

COACH POTENTIAL

EXECUTE STRATEGY

LEADERSHIP IMPLEMENTATION PLAN

1 2 **FEEDBACK APPROACH**

COACHING FRAMEWORK

ENGAGEMENT

MEANINGFUL WORK

ENVIRONMENT OF TRUST

VALUED MEMBER

WINNING TEAM
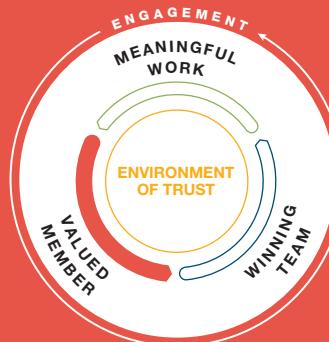
HIDDEN POTENTIAL

"

Leadership is communicating to people their **worth** and **potential** so clearly they come to see it in themselves.

STEPHEN R. COVEY

WHOLE-PERSON
Paradigm

Effective leaders see people as whole people who are inherently capable. They have a coaching mindset that moves away from telling others what to do, to empowering others to discover solutions themselves.

WHOLE PERSON

BODY
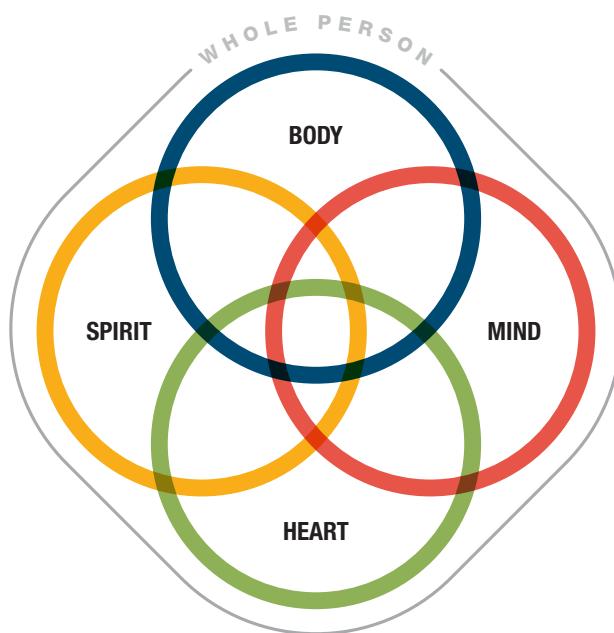
SPIRIT

MIND

HEART

BODY: Pay, benefits, working conditions

MIND: Challenging and interesting work

HEART: Relationships, connectedness

SPIRIT: Meaning, purpose, mission

Feedback vs. Coaching

FEEDBACK	COACHING
Addresses past and current behavior.	Addresses future behavior.
Focuses on values and expectations.	Focuses on options and possibilities.
Is provided frequently and quickly, often in the moment.	Is provided over time, in ongoing conversations.

"

Feedback lets team members know what you value. Frequent positive feedback **reinforces** the very best work they do.

CATHERINE NELSON

FEEDBACK APPROACH

Giving frequent feedback is an important way to reinforce great work, intentionally build team culture, and help improve performance.

USE THESE TWO STEPS TO SHARE FEEDBACK:

1. Share a specfic observation.

2. Describe the impact.

"

High-performing teams share more than **five times more positive feedback** than low-performing teams.

MARCIAL LOSADA & EMILY HEAPHY

Provide Feedback

PRACTICE POSITIVE FEEDBACK

Think of at least one person who deserves *positive* feedback.

1. What did you observe?

2. What was the impact?

PRACTICE INSTRUCTIVE FEEDBACK

Think of someone on your team who would benefit from *instructive* feedback.

1. What did you observe?

2. What was the impact?

FEEDBACK APPROACH

HOW DO YOU REINFORCE WHAT'S MOST

Positive feedback is an important way
reinforce great work and build a culture
people feel respected and appreciated.
Instructive feedback is essential to help
improve performance. Both kinds of feed
use these two steps.

WHAT TO DO:

1. Share a specific observation.
   - Lay out the facts of what you've
   - Avoid labels. G
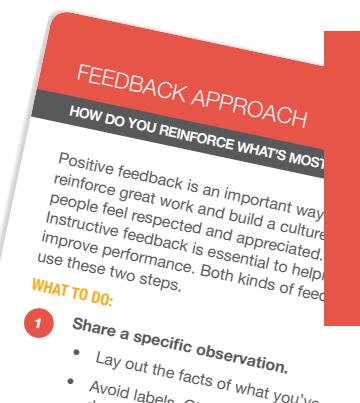
COACHING
Skills

—

There are three key skills to use when coaching:
listening, questioning, and acknowledging.

These three skills help you set aside your agenda, explore options,
and build capability.

LISTENING

ACKNOWLEDGING   QUESTIONING

LISTENING

First, listen to the other person to fully understand his or her point of view. Put aside your assumptions and step into learner mode to enhance your understanding.

1. Be Silent

Allow the other person time and space to speak. Your goal is to understand as much as you can from the other person's perspective.

2. Show Empathy

Reflect how the person feels about what is happening. You don't have to agree, just show understanding.

3. Summarize Your Understanding

Restate what you've heard to ensure that you understand and haven't missed anything.

THE LISTENING CONTINUUM

Within the other's frame of reference.

IGNORING   PRETEND LISTENING   SELECTIVE LISTENING   ATTENTIVE LISTENING   EMPATHIC LISTENING

Within one's own frame of reference.

COACHING SKILL
LISTENING

ARE YOU LISTENING TO UNDERSTAN

Listen to the other person to fully unde
or her point of view. Put aside your ass
and step into learner mode to enhance
understanding.

WHAT TO DO:

1 Be silent. Allow the other person time an
space to speak.

2 Show empathy. Reflect how the person
feels about what is happening. You d
have to agree, just show

3 Sum

Telling reinforces **dependency**; coaching develops **capability**.

COACHING QUESTIONS

QUESTIONING

Good questioning is a learnable skill that helps you lay aside your agenda, understand others, and help them discover their own solutions. There are three types of coaching questions:

1. Clarifying

When you ask clarifying questions, you seek understanding.

"When you say_____, what does that mean?" "Can you tell me more?"

2. Open-Ended

When you ask open-ended questions, you create the space to explore options. Open-ended questions usually begin with how, what, and where, and cannot be answered with a simple yes or no.

"How would you address that?"

3. Insightful

When you ask insightful questions, you tap into the creative brain. Use this two-part formula:

- Imagine what's possible.
- Then ask an open-ended question.

"Supposing you could... What would you do?"

(**CLARIFYING**)   (**OPEN-ENDED**)   (**INSIGHTFUL**)

G SKILL
STIONING
OU ASKING INSIGHTFUL QUESTIONS?

t questions can provoke real insight and
he foundation for change. There are three
es of coaching questions.

AT TO DO:

1   Ask clarifying questions to seek
     understanding.

     Ask open-ended questions to explore
     tions.

16
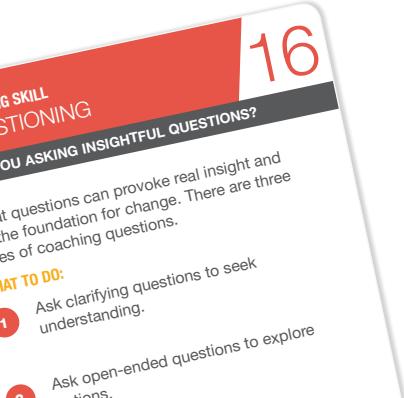
Coaching Questions EXAMPLES

SCENARIO: A team member comes to you and says she is having a problem working with Kim.

CLARIFYING	OPEN-ENDED	INSIGHTFUL
"When you say you are having a problem with Kim, what does that mean?"	*"How have you approached it so far?"*	*"Think about what you would like your working relationship with Kim to be. What's one thing you could do today to build that?"*

ACKNOWLEDGING

Remind others of the skills and resources they already have that could apply to the current situation. Assume capability. Ask questions that remind the person of his or her skills and experience.

1. **Share a skill you've observed.**

   Remind yourself and the person that he or she has proven to be capable in the past.

2. **Express confidence.**

   Set the tone for success. Be deliberate and specific.

EXAMPLES

- "Last year your team worked on a similar project that was very challenging. What key learnings did you take away that can help you here?"

- "You've had experience with _____ in other projects. How might you use what you learned to help now?"

- "What have you read or learned that you might apply in this situation?"

G SKILL
NOWLEDGING

OU ASSUMING CAPABILITY?

nowledging recognizes the person's ability
olve the problem based on skills, talent, and
erience he or she already has. Remind others
additional resources they could apply to the
rrent situation.

HAT TO DO:

1 Share a skill you've observed. Remind
   yourself and the person that he or she has
   proven to be capable in the past.
   nfidence. Set the tone

"

**Leadership** happens one **conversation** at a time.

MOON, DAVIS, SIMPSON, MERRILL
TALENT UNLEASHED

COACHING
Framework

—

Leadership coaching uses coaching skills to help team members improve their performance and develop their potential.

The Coaching Framework begins individually with personal preparation and continues with the coach and coachee working together through four steps.

PREPARE

1
CLARIFY

2
LEARN

3
EXPLORE

4
COMMIT
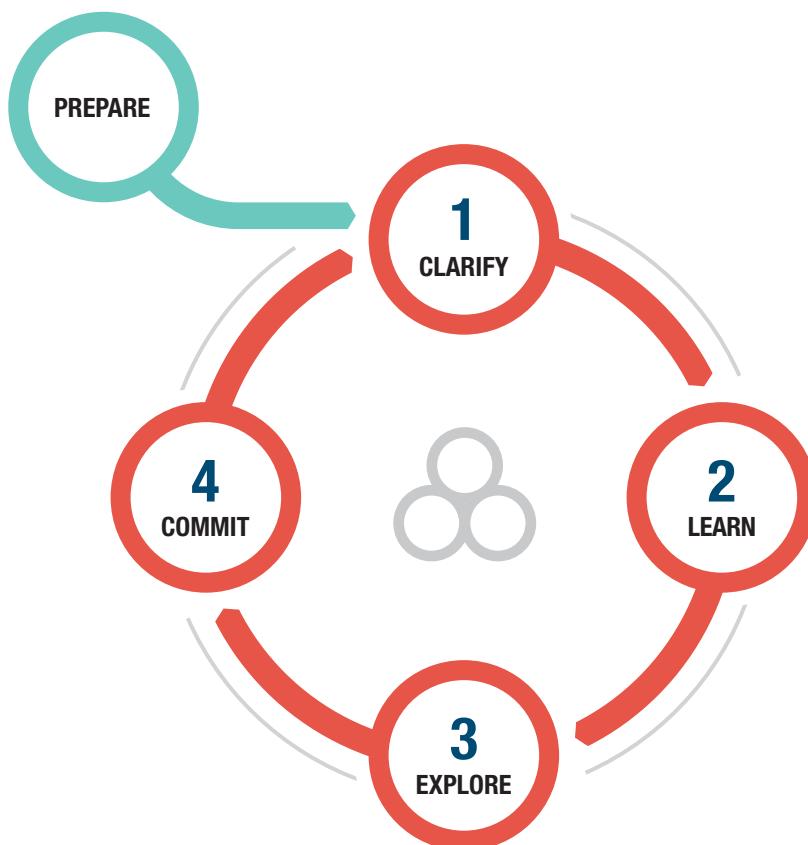
Coaching Steps

Use the coaching steps to help team members address performance issues, solve problems, and develop career opportunities.

● **Prepare** Yourself

- Take time to examine your motives.
- Set aside your agenda.

1. **Clarify** Together

- Agree together on the desired purpose.
- Establish a realistic time frame for the conversation.

2. **Learn** by Listening

- Listen empathically to understand the other person's point of view.
- Ask clarifying questions to ensure understanding.

3. **Explore** Options

- Use questioning and acknowledging to generate options.
- Clear the path and share ideas as appropriate.

4. **Commit** to Action

- Invite the person to make commitments.
- Establish follow-up.

COACHING FRAMEWORK

HOW DO YOU BUILD OTHER LEADERS?

18

Use the coaching steps to help team members address performance issues, solve problems, and develop career opportunities.

PREPARE

1 CLARIFY

EFFECTIVE COACHING

Great leaders coach intentionally. They practice specific, proven skills that result in effective coaching conversations that help team members develop, grow, and reach their potential.

PREPARE

1
CLARIFY

2
LEARN

3
EXPLORE

4
COMMIT
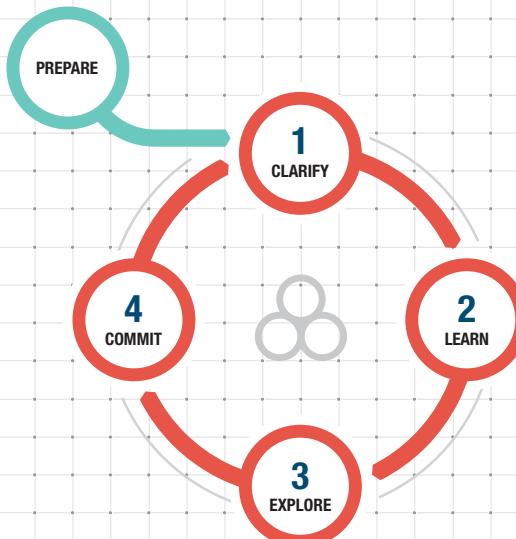
Coaching Practice

My coaching opportunity:

OPTIONAL COACHING SCENARIOS

Performance
A team member frequently dismisses other people's ideas and can be aggressive in meetings. He or she is a high performer but often leaves others feeling frustrated.

Problem Solving
A project leader on your team comes to you with a significant resource challenge for a high-profile project (insufficient budget, not the right people, deadlines, etc.).

Career
You believe a high-performing team member has a lot more potential than his or her current role requires.

Prepare

What are my motives?

How can I put my agenda aside?

OBSERVER INSTRUCTIONS

As the observer, *your role is crucial*.

HERE'S WHAT YOU DO:

During the coaching practice:

- Begin the practice. Share the 7-minute time limit.

- Observe closely what happens. Identify examples of specific behaviors and the impact, referring to the "Feedback Approach" card (14). Look for what the coach did well and where there are opportunities to improve.

- Record your observations in the Observation Tool.

After the coaching practice:

- Lead a 3-minute debrief. Start this discussion by asking the coach questions like:

  - How do you think you did?

  - What did you do well?

  - What could you have done better?

Then provide your feedback and invite the person who played the role of the coachee to participate in the discussion.

WHEN GIVING FEEDBACK, REMEMBER TO:

- Use the *two-step feedback approach.* What did you observe and what was the impact?

- *Avoid overloading* the person with feedback. A single powerful message is better than many different messages.

- Check for *receptivity*. Stop giving feedback if the person does not appear to be receiving it or if he or she already understands it.

- Be *helpful*. Don't be overly positive or overly negative.

14

BACK APPROACH

DO YOU REINFORCE WHAT'S MOST IMPORTANT?

tive feedback is an important way to
force great work and build a culture where
ple feel respected and appreciated.
tructive feedback is essential to helping
prove performance. Both kinds of feedback
e these two steps.

WHAT TO DO:

Share a specific observation.

- Lay out the facts of what you've seen.
- Give a simple, clear

OBSERVATION TOOL

What did you observe? What was the impact?

Observer Name: ....

1. **CLARIFY** TOGETHER

2. **LEARN** BY LISTENING

3. **EXPLORE** OPTIONS

4. **COMMIT** TO ACTION

FEEDBACK AND COACHING IN THE DIGITAL AGE

Texts, emails, and online web platforms can be a great way to share positive feedback and coach. The same principles apply—you just need to be more explicit about each step.

As you use digital media to give feedback and coach, remember to:

- Ask yourself why you are using digital media. What is your desired outcome? Can this conversation happen face-to-face?

- Declare your intent. Share why you are giving the feedback before you give it. For example, "I'd like to let you know how much I appreciated the extra effort you made," or "I want to check my understanding of the budget you submitted."

- Make the problem the problem, not the person. Rather than "You did a poor job on the analysis," try "The analysis would have had more impact with additional data."

- Use emoticons and emojis as needed to share your intended feelings and emotions. Don't overdo it, but have some fun!

- Proofread before you hit "send," and watch out for unintended autocorrects.

- Pause, or even step away from your device, before sending. Ask yourself, "Is this *still* the message I want to send? How could it be misinterpreted?"

Choose the **right medium** for the message.

> **REMEMBER:**
> We interpret much more from what we see and hear than what we read. When you can't see the other person's face or body language or hear the tone of voice, it's much easier to misinterpret a person's feelings and motives—we are more likely to "downgrade" the feedback. Positive messages can be interpreted as neutral. Neutral messages can be interpreted as negative.

Great job this morning! Your presentation was so well prepared. It got everyone pumped about the new project! 👍

Feedback and Coaching in the Digital Age **EXAMPLES**

Your work on the new orientation program is outstanding. It's going to make such a difference to the interns we have coming in June. Thank you for being such a great role model of our values!

"I'm checking my understanding of the budget you submitted…"

"I wanted to share some feedback on the draft hiring proposal you submitted that I hope will be helpful. While I sense the team's need for two new hires, I don't think the business case is there yet. Some ideas to consider: If you had these new positions in place, how would the division benefit? How can you make the connection back to our overall strategy of a differentiated customer experience? Is there a way to show the payoff in six months? Let me know if you want to connect to discuss some more."

I have an opportunity on our team that I think could be a great fit for you and let you use more of your analytical skills. Let's talk about this during our one-on-one this week.

"I want to let you know how much I appreciate the extra effort you made to take care of the location mix-up. Our client was very impressed by your follow-through."

"There seems to be a very long turnaround between when we submit our work orders and when they are assigned to someone. This is leading to a lot of very unhappy customers. What are your thoughts on why this is happening, and what we can do to fix it?"

"I wanted to tell you how impressed I was with your presentation to the Ops team. Your changes were very clear and you answered all their questions simply and effectively. I think they understand now why we have to make this change. This is a huge step forward. Thank you! ☺"

"Tell me more about what you mean when you say you'd like the team to be more innovative."

> The Client Service team wants more time to think about our proposal, but I think they've had plenty of time already.

> Sounds like they still have some concerns.

> They think the rollout will be too disruptive.

> What are your thoughts about that?

> I think it can be done in six weeks—five if everything goes to plan.

> Sounds like you can see it, but they can't. Anything else you can do to assuage their concerns?

> Hmm… Let me go back and meet with their operations lead. I'll see if we can come up with a better transition plan.

COACH POTENTIAL
Summary

Effective leaders provide frequent positive feedback and appropriate instructive feedback to reinforce what they value.

There are three key coaching skills: listening, questioning, and acknowledging

The Coaching Framework is a repeatable process to help leaders release team members' potential to improve performance, solve problems, and develop careers.
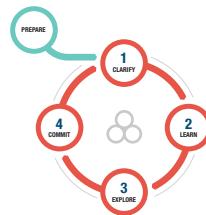
LEADERSHIP IMPLEMENTATION PLAN

 FEEDBACK APPROACH

 COACHING FRAMEWORK

Implementation Guide page 53

NOTES

SELF-ASSESSMENT
AND TOOLS

SELF-ASSESSMENT

INSPIRE TRUST

Ⓞ No Opinion   ① Disagree a Lot   ② Disagree   ③ Neither Agree nor Disagree
④ Agree   ⑤ Agree a Lot

WHEN IT COMES TO BUILDING CREDIBILITY AND TRUST, I…	
Act in congruence with my values and principles.	Ⓞ ① ② ③ ④ ⑤
Am genuinely open to rethinking ideas.	Ⓞ ① ② ③ ④ ⑤
Show courage in dealing with difficult situations.	Ⓞ ① ② ③ ④ ⑤
Genuinely care about people.	Ⓞ ① ② ③ ④ ⑤
Act in everyone's best interests.	Ⓞ ① ② ③ ④ ⑤
Let others know my intentions.	Ⓞ ① ② ③ ④ ⑤
Am highly competent in my role.	Ⓞ ① ② ③ ④ ⑤
Work to keep my skills and knowledge relevant.	Ⓞ ① ② ③ ④ ⑤
Display an inclusive leadership style.	Ⓞ ① ② ③ ④ ⑤
Openly express confidence in others.	Ⓞ ① ② ③ ④ ⑤
Take responsibility for results.	Ⓞ ① ② ③ ④ ⑤
Stay strong and show resilience.	Ⓞ ① ② ③ ④ ⑤
Intentionally focus on building a positive team culture.	Ⓞ ① ② ③ ④ ⑤
Model the organization's values.	Ⓞ ① ② ③ ④ ⑤

CREATE VISION

⓪ No Opinion ① Disagree a Lot ② Disagree ③ Neither Agree nor Disagree ④ Agree ⑤ Agree a Lot	

WHEN IT COMES TO VISION AND STRATEGY, I…	
Help the team understand the organization's mission, vision, and strategy.	⓪ ① ② ③ ④ ⑤
Have an inspiring vision for the team.	⓪ ① ② ③ ④ ⑤
Focus the team on understanding and meeting customer needs (internal and external).	⓪ ① ② ③ ④ ⑤
Have a clear understanding of external influences and how they affect the team.	⓪ ① ② ③ ④ ⑤
Understand and value the team's core capabilities.	⓪ ① ② ③ ④ ⑤
Help the team impact the organization's financial success.	⓪ ① ② ③ ④ ⑤
Regularly communicate the team's strategy in a compelling way to create buy-in at multiple levels.	⓪ ① ② ③ ④ ⑤
Communicate clearly and concisely.	⓪ ① ② ③ ④ ⑤
Communicate confidently and positively.	⓪ ① ② ③ ④ ⑤

EXECUTE STRATEGY

⓪ No Opinion ① Disagree a Lot ② Disagree ③ Neither Agree nor Disagree
④ Agree ⑤ Agree a Lot

WHEN IT COMES TO GETTING WORK DONE, I...	
Ensure the right people are in the right roles.	⓪ ① ② ③ ④ ⑤
Eliminate unnecessary hierarchy.	⓪ ① ② ③ ④ ⑤
Recognize and reward great performance regularly.	⓪ ① ② ③ ④ ⑤
Ensure people have the right resources to be productive.	⓪ ① ② ③ ④ ⑤
Empower the people closest to the work to make decisions.	⓪ ① ② ③ ④ ⑤
Focus the team's energy and resources on the most important goals.	⓪ ① ② ③ ④ ⑤
Establish clear measures to track progress on team goals.	⓪ ① ② ③ ④ ⑤
Meet regularly to discuss progress of team goals.	⓪ ① ② ③ ④ ⑤
Create accountability for the team to achieve their goals.	⓪ ① ② ③ ④ ⑤
Allow people the freedom and latitude they need to accomplish their work.	⓪ ① ② ③ ④ ⑤

COACH POTENTIAL

⓪ No Opinion ① Disagree a Lot ② Disagree ③ Neither Agree nor Disagree
④ Agree ⑤ Agree a Lot

WHEN IT COMES TO WORKING WITH OTHERS, I…	
Regularly provide positive feedback.	⓪ ① ② ③ ④ ⑤
Am comfortable giving tough feedback in a helpful way.	⓪ ① ② ③ ④ ⑤
Don't tolerate low performance or inappropriate behavior.	⓪ ① ② ③ ④ ⑤
Welcome candid feedback from others.	⓪ ① ② ③ ④ ⑤
See potential in others and bring out the best in them.	⓪ ① ② ③ ④ ⑤
Am a good listener.	⓪ ① ② ③ ④ ⑤
Help people discover their own solutions rather than solving their problems for them.	⓪ ① ② ③ ④ ⑤
Remind people of their own talent and experience when problem solving.	⓪ ① ② ③ ④ ⑤
Am a good coach.	⓪ ① ② ③ ④ ⑤
Take time to build other leaders.	⓪ ① ② ③ ④ ⑤

What two or three things could I do to improve my leadership?

What do I do really well as a leader?

NOTES

OBSERVATION TOOL

What did you observe? What was the impact?

Observer Name:

1. **CLARIFY** TOGETHER

2. **LEARN** BY LISTENING

3. **EXPLORE** OPTIONS

4. **COMMIT** TO ACTION

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