

Leadership Fundamentals

with Britt Andreatta

Exercise Guide

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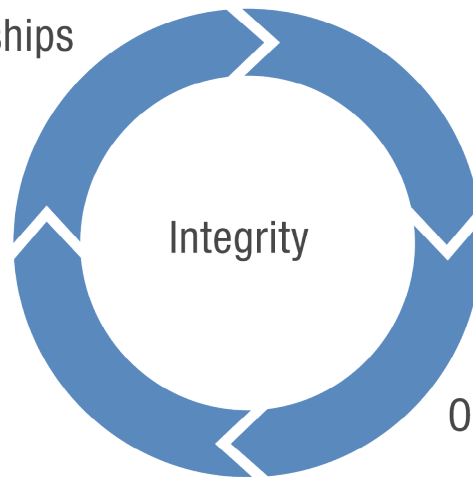
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Rate Your Leadership Skills (1-1)

Building Relationships

Business Acumen



Self-Awareness

Organizational Strategy

Assess your proficiency in each of the clusters affiliated with effective leadership. For each competency, rate yourself on a scale of 1 to 5 with 1 being a low level of skill and 5 being a high level of skill.

	Competency	Definition	1 2 3 4 5
Integrity	Integrity	Maintaining standards of honesty; speaking and acting in alignment with values; taking responsibility for personal performance; trustworthy	
Self Awareness	Knowledge of self	Knowing all aspects of self including emotions, values, personality, and recognizing their impact; using “gut instincts” to guide actions	
	Accurate self-assessment	Accurately perceiving strengths and weaknesses, and role in interactions in ways that line up with others’ views	
	Self-confidence	Strong self of one’s self worth and capabilities	
	Emotional self-control	Managing impulsive or distressing feelings so that they don’t impact others negatively	
	Achievement drive	Striving to meet a standard of excellence; ability to set and achieve goals; persistence and sustainability	
	Adaptability	Demonstrating flexibility in adapting to changing situations or overcoming obstacles; resilience	
	Learning orientation	Commitment to continual learning and improvement; actively identifying new areas for growth and taking advantage of opportunities to learn and practice	

	Competency	Definition	1	2	3	4	5
Building Relationships	Empathy	Accurately sensing and understanding others' emotions; taking active interest in their needs and concerns					
	Communication	Hearing and listening to others; sending and receiving messages accurately					
	Developing others	Sensing others' developmental needs; enhancing others' abilities through feedback and coaching					
	Facilitating team performance	Creating group synergy in pursuing collective goals through collaboration and cooperation					
	Managing conflict	Negotiating and resolving disagreements; facilitating others to move through conflict					
	Appreciating diversity	Valuing the contributions of a wide range of people; understanding the influences of various factors including race, gender, economic background, nationality, etc.					
	Building influence	Identifying and nurturing instrumental relationships; effectively persuading others					
	Service orientation	Anticipating and meeting the needs of others (followers, employees, customers); contributing to the common good					
Business Acumen	Functional or technical skills	Knowledge and effective use of specific skills, practices and tactics specific to position and function					
	Adherence to culture	Ability to adhere to culture and values (both stated and implied) of organization; adherence to policies and procedures					
	Planning and organizing	Ability to orchestrate multiple activities and establish courses of action to ensure that work is completed efficiently					
	Decision making	Ability to identify and analyze information, draw conclusions, identify appropriate solutions, and choose a course of action					
	Initiative and innovation	Ability and willingness to identify solutions and act on opportunities; comfort with novel ideas and approaches					
	Managing work	Effectively manages time and resources of self and others; clearly assigns responsibility for tasks, sets clear objectives, monitors progress, and provides feedback					
	Knowledge of industry	Ability to scan various sources about current trends, drawing accurate connections and conclusions					
	Organizational acumen	Accuracy and keenness of judgment or insight around all aspects of organization including current and future policies, trends, technology, information, and people					

	Competency	Definition	1	2	3	4	5
Organizational Strategy	Industry analysis	Ability to analyze various sources about potential developments, pressures and opportunities, drawing accurate connections and conclusions					
	Political acumen	Accuracy and keenness of judgment or insight around formal and informal influences that shape decision making in the organization					
	Global awareness	Ability to analyze various sources about current and potential developments in the economic, political, social, and natural aspects of regions around the world, drawing accurate connections and conclusions					
	Vision and purpose	Articulating an inspiring and compelling vision for the future of the organization; motivates and mobilizes others through passion and clear communication					
	Strategic direction	Identifying and designing a long-range plan to maximize the success of the organization after effective analysis of a wide range of relevant factors					
	Dealing with complexity	Comfort with ambiguity and paradox; able to understand and effectively respond to multiple and conflicting pressures					
	Catalyzing change	Initiating, designing and facilitating change and new directions					
	Inspiration leadership	Guiding and motivating others through a compelling vision; aligning the goals and strategies of the organization					

Managing and Leading (1-2)

Review the differences between management and leadership and make some notes about your specific job and role. When are you doing each?

	Management	Leadership	Notes
1. Approach	Tactical	Strategic + visionary	
2. Time frame	Short- to mid-term to ensure success of organization now; sets timetables and agendas to achieve identified goals	Mid- to long-term to ensure success of organization in future; sets vision and strategy for organization change	
3. Focus	Focus is narrow and internal to organization	Focus is broad (both internal and external influences) including other functions, industry, market, and national and global affairs	
4. Resources	Uses currently established resources such as budget, staff, policies and procedures	Seeks and attains/creates new resources to ensure success of future goals	
5. Task goals	Directs daily work to achieve currently identified goals	Envisions future goals and creates new products and processes to achieve them	
6. People goals	Supervises staff to maximize their productivity; coordinates efforts of teams to maximize performance	Builds culture to maximize engagement and commitment; inspires stakeholders, fosters collaboration, and cultivates next generation of leaders	
% of time you spend			

Leadership Level (1-4)

Think about your organization and the position you hold.

Level	Focus	Who	%Tactical	%Strategic
5. Leader of organization	Envision and strategize	Leaders of the organization	10	90
4. Leader of function	Align and maximize	Leaders of functions or divisions	25	75
3. Leader of leaders	Model and train	Leaders of managers and/or professional staff	50	50
2. Expert/Manager	Transition and develop	Leaders of individual contributors, experts	75	25
1. Individual contributor	Focus and prepare	Individual contributors, and emerging leaders	90	10

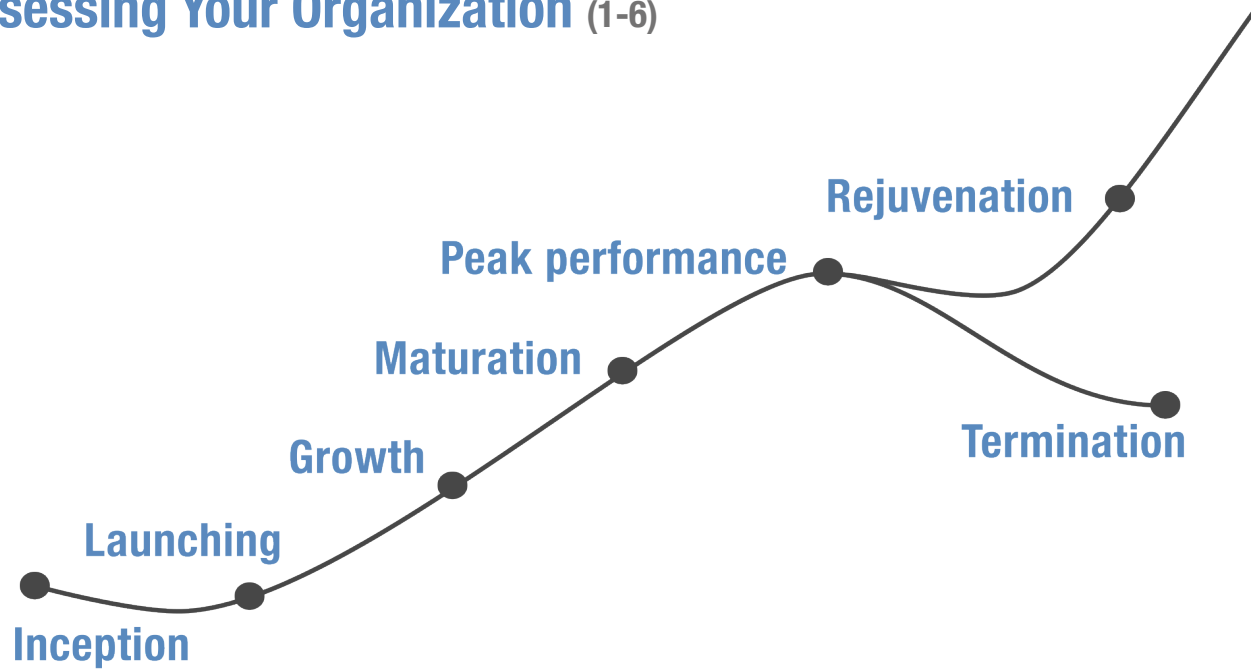
What is your current level of leadership?

What skills do you need to hone for your current level?

What do you need to develop to successfully lead at the next level?

Are you at the right balance or proportion of management and leadership skills? If not, what can you do to shift your workload?

Assessing Your Organization (1-6)



In which stage of development is your organization?

What do you need to do to maximize performance at this stage?

What do you need to do to get to the next stage?

Effect of common factors

Use this chart to assess the impact that common external and internal factors may have on your organization. Feel free to add factors you have identified. Note whether you perceive the impact to be positive (+), negative (–), or neutral (o).

	Factor	Low Impact	Medium Impact	High Impact
External	Local, state, and national policies or regulations			
	Dependence on technology			
	Fluctuating cost of key resources like fuel or food			
	Changing weather patterns			
	Generational differences in workplace expectations			
	Predictability of market trends			
	Influence of shareholders			
	Dependence on international markets/products			
	Predicted shortages in certain skilled workforces			
	National and global economies			
	Other:			
	Other:			
Internal	Leadership philosophy of the top executives			
	Power and influence of departments/individuals			
	Remote employees and virtual teams			
	Access to key resources			

	Factor	Low Impact	Medium Impact	High Impact
Internal (continued)	Motivation and engagement of employees			
	Trust			
	Growth and profit			
	Customer satisfaction			
	Company culture			
	Other:			
	Other:			

How can you learn more about, and stay current on developments with the factors with medium to high impact?

How can negative impacts be neutralized?

Could any of the neutral impacts be made into positive forces?

Mapping the Competencies (2-1)

Mapping Leadership Skills to Professional Competencies

	Leadership Skill	Lominger Competencies	DDI Competencies	Britt's Additions
Integrity	Integrity	Ethics and values Integrity and trust	Integrity Building trust	
Self Awareness	Knowledge of self	Self knowledge		
	Accurate self-assessment			Accurate self-assessment
	Self-confidence			Self-confidence
	Emotional self-control	Personal disclosure Patience Composure	Judgment	
	Achievement drive	Drive for results Career ambition Time management		
	Adaptability	Humor Perseverance Work/life balance	Adaptability	Resilience Sustainability
	Learning orientation	Personal learning Intellectual horsepower Learning on the fly Self development	Continuous learning Continuous improvement	
Building Relationships	Empathy	Interpersonal savvy Sizing up people Approachability Understanding others Compassion		
	Communication	Listening Informing Written communication	Communication Information monitoring	Transparency
	Developing others	Caring about direct reports Fairness to direct reports Developing direct reports and others Confronting direct reports Directing others	Aligning performance for success Coaching Developing others	

	Leadership Skill	Lominger Competencies	DDI Competencies	Britt's Additions
Building Relationships (continued)	Facilitating team performance	Building effective teams	Contributing to team success Building a successful team Meeting leadership	
	Managing conflict	Conflict management	Managing conflict	
	Appreciating diversity	Managing diversity	Valuing diversity	Cultural competence
	Building influence	Motivating others Negotiating Boss relationships Comfort around higher management Peer relationships	Influencing others Building partnerships Building trust Negotiation Building strategic working relationships	
	Service orientation	Customer focus	Customer focus Building customer loyalty	Commitment to common good
Business Acumen	Functional or technical skills			
	Adherence to culture			Adherence to culture and values (spoken and not) Adherence to policies and practices
	Planning and organizing	Organizing Planning Total work system Managing through systems	Planning and organizing Meeting participation	
	Decision making	Priority settings Timely decision making Decision quality Problem solving	Operational decision making Decision making Problem/opportunity analysis	
	Initiative and Innovation	Innovation management Creativity Action oriented	Innovation Initiating action	
	Managing work	Command skills Process management Managing and measuring work Delegation	Managing work Work standards Quality orientation Delegating responsibly Driving execution Follow up	
	Knowledge of industry			Industry and market knowledge
	Organizational acumen	Business acumen	Business acumen	Professional conduct (appropriate to setting)

	Leadership Skill	Lominger Competencies	DDI Competencies	Britt's Additions
Organizational Acumen	Industry analysis			Analysis of Industry and market developments, pressures and opportunities National and global awareness
	Political acumen	Political savvy		
	Global awareness			Global awareness
	Vision and purpose	Managing vision and purpose	Selling the vision Gaining commitment	Driving culture
	Strategic direction	Managerial courage Standing alone	Establishing strategic direction Strategic decision making Strategic job design Risk taking	Driving culture
	Dealing with complexity	Dealing with paradox Dealing with Ambiguity Perspective		
	Catalyzing change	Strategic agility Organizational agility	Change leadership Facilitating change	
	Inspirational leadership		Inspiring others Leading through vision and values	

Discovering Your Core Values (2-2)

Step 1: Using this list of common values, circle the ones that are most important to you, underline those that are somewhat important to you, and cross out any that are least important to you. There is no limit to the number you can have in each category and you can add other values to the third column.

Accuracy	Generosity	Preparedness
Achievement/Success	Gratitude	Prosperity
Adventure	Growth	Quality
Autonomy	Happiness	Rationality
Balance	Harmony	Recognition
Beauty	Health	Recreation
Boldness	Honesty	Reliability
Camaraderie	Honor	Resourcefulness
Challenge	Humor	Respect
Collaboration	Impartiality	Risk-taking
Communication	Independence	Science
Competence	Individuality	Security
Competition	Innovation	Service
Consistency	Integrity	Simplicity
Control	Intelligence	Sincerity
Courage	Intuition	Spirituality/Faith
Creativity	Joy	Stability
Curiosity	Kindness	Strength
Decisiveness	Knowledge	Teamwork
Dependability	Leadership	Trust
Discipline	Learning	Truth
Discretion	Liberty	Uniqueness
Diversity	Love/Affection	Unity
Effectiveness	Loyalty	Variety
Efficiency	Mastery	Vision
Empathy	Modesty	Warmth
Enjoyment	Nature	Wealth
Equality	Nonconformity	Wisdom
Expediency	Open-mindedness	Zeal
Fairness	Optimism	Other:
Family	Patience	Other:
Flexibility	Perseverance	Other:
Friendship	Power	Other:
Freedom	Practicality	Other:

Step 2: Now revisit this list. You have to get down to your top 10 values. You may want to start by crossing out those that you underline earlier. But you can only have 10 circled by the end of this round.

- What did you notice about yourself in doing this exercise?
- How did you make choices about which values to include?

Step 3: Revisit the list one last time and get down to your top 5 values. They don't have to be ranked in relation to each other but they do need to be your most important, core values.

- What are your top 5 values?
- Does this list surprise you at all? Why or why not?
- When you think back on your childhood, what experiences shaped or contributed to the development of these values?
- How have experiences in your adulthood shaped these core values?

Take each value and list the activities you do that express that value. Consider all aspects of your life including work, family roles, interest, hobbies, shopping, etc. Estimate the percentage of your time each month that is spent on each value.

Value:	Value:	Value:	Value:	Value:
% time	% time	% time	% time	% time

- Are there values that are expressed through a lot of your time and activities?
- Are there any that are not getting sufficiently expressed? What can you do to change that?
- Based on how you spend your time and the activities you do, what would others think are your top values?
- Focus now specifically on work. Based on their interactions with you, do you think your colleagues at work would know that these are your core values? Why or why not?
- How can you demonstrate more clearly, through words and actions, your values at work?

Developing People (2-5)

During a one-on-one meeting with your employee, express that you'd like to support his or her growth. In order to do that, you'd like to ask some questions that are designed to give you a more complete picture. It is important you come from a sincere place of caring and encouragement. Ask follow up questions as need to insure your accurate understanding.

- Tell me more about why you chose this position and this organization?
- How do you like to structure your work?
- What kind of work environment makes you feel the most engaged?
- Think back on a time when you had a peak performance professionally. A time when you felt you really shined or performed at your best. Tell me about it. What do you think set that situation apart from others?
- What do you think are your strengths?
- How can we further enhance or develop those?
- What would you identify as your weaknesses or areas for growth?
- Pick 1 or 2 to focus on for improvement. How can we develop you in that area?
- How would you describe your learning style? Consider it the best way you learn new things. What kinds of experiences or programs maximize your growth?
- Are there any programs or courses you have identified that would support your professional development? Tell me more about them.
- What motivates you professionally and personally?
- Tell me about your passion for this type of work?
- What are your short- and long-term career goals?
- In order to achieve them, what could you be doing now to set yourself up for success?
- Do you know what your triggers are? Triggers are things or situations that can upset us, almost like a pet peeve but more intense. Are there certain situations, experiences or even people that trigger you?
- Do you feel that you have effective strategies or practices that help you manage your triggers? How can I support you in this?
- I'd love to get your thoughts about our team/group/department. How can we increase the effectiveness of our communication?
- How can we increase the effectiveness of our teamwork?
- In order to be the best leader for this team/group/department, what advice would you have for me for my own growth and development?
- How can I best support you in your role here?

I also recommend that you complete the "Evaluating People" form that is in the Exercise files for my course Delegating Tasks to Your Team. It will help you make a thorough and accurate assessment of each of your direct report.

Using the information you have gathered, help each employee craft a professional development that includes quarterly and annual goals, particularly around the following:

- Developing strengths and weaknesses
- Motivation and engagement
- Managing triggers
- Short- and long-term career goals

Then be sure you provide coaching, and professional development opportunities to help him or her achieve these goals. Make it a regular part of your one-on-one meetings to revisit the development plan, adjusting as needed.

Team Playbook (2-6)

Goal:

Milestones:

Deadline:

Shared practices:

- Criteria for evaluating ideas
- Process for making decisions
- Communication flow and format
- Expectations for behavior/conduct
- Building and maintaining trust

Roles:

- Gather information/data
- Analyze information/data
- Coordinate efforts
- Track progress
- Leadership
- Followership
- Quality/standard assurance

- Group cohesiveness/camaraderie
- Other:

Resolving conflict:

- How and by when

- Mediator
- Final authority

Accountability:

- How measured

- When assessed

- Consequences

Resources:

What	By Whom	By When

Recommendations and References for Leadership Fundamentals

Books:

- *The Happiness Advantage* by Shawn Achor
- *Leading at a Higher Level* by Ken Blanchard
- *Leading with Soul* by Lee Bolman and Terrence Deal
- *The Seven Hidden Reasons Employees Leave* by Leigh Branham
- *Managing Transitions* by William Bridges
- *The Gifts of Imperfection* by Brené Brown
- *Good to Great* by Jim Collins
- *The Power of Habit* by Charles Duhigg
- *Working with Emotional Intelligence* by Daniel Goleman
- *Privilege, Power and Difference* by Allan Johnson
- *The Leadership Challenge* by Jim Kouzes and Barry Posner
- *The Three Signs of a Miserable Job* by Patrick Lencioni
- *For Your Improvement* by Michael Lombardo and Robert Eichinger
- *Maslow on Management* by Abraham Maslow
- *Leadership Theory and Practice* by Peter Northouse
- *Drive* by Daniel Pink

Websites:

- Center for Creative Leadership
www.ccl.org
- Great Place to Work
www.greatplacetowork.com
- The Leadership Challenge
www.leadershipchallenge.com
- MindTools
www.mindtools.com