Contents

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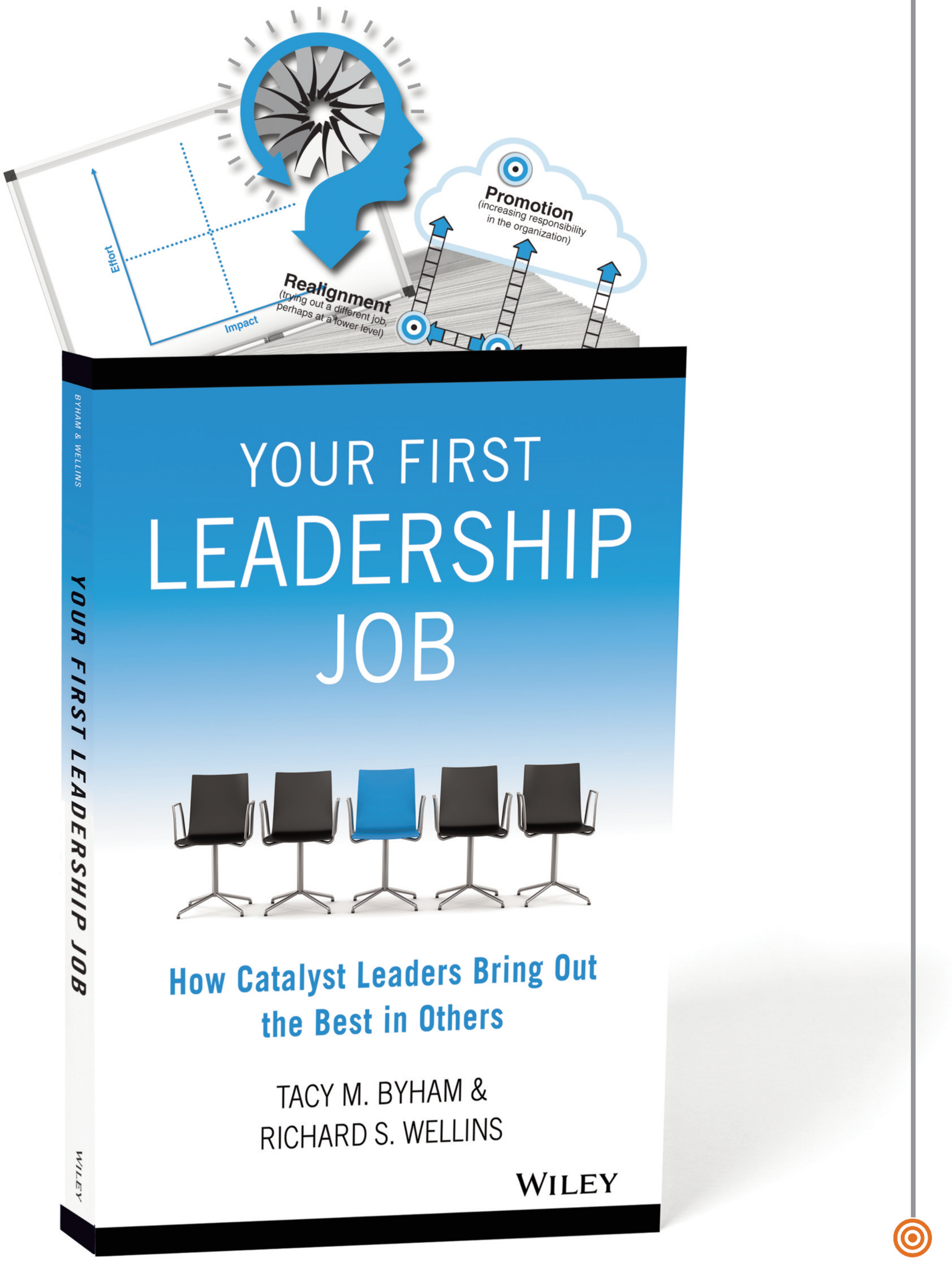
Bonus Tool

Book Club Discussion Questions

for Your First Leadership Job



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Your First Leadership Job

BOOK DISCUSSION GUIDE

Part 1: Catalyst Leadership

Chapter 1: Now You're a Leader

- The first time you managed people (not just a project) the emotion you felt was…..?

Chapter 2: Boss or Catalyst?

- What made you most anxious when you reviewed the Frontline Leadership Success Profile (Tool 2.2)?

Chapter 3: Navigating the Transition to Leadership

- Think about the first time you told friends about getting (or wanting) your new leadership job.
  - What was appealing to you?
  - What did you think it would mean for your career?
  - Did you talk about perks or power?
  - Competing with others?
  - Getting away from people or job functions you didn't like?
  - Be honest: What's really driving you?
- Who believed in you before you believed in yourself?
- Who in your life (or on your team) needs you to believe in them?

Chapter 4: Your Leadership Brand, Part 1

- With shrieking Tanya from the opening story in mind, consider these three points:
  - What should Tanya have said to her team about her mistake?
  - Have you ever faced (or seen someone face) something similar? What worked about how you feel (or he) handled it? What didn't?
  - Where do you personally draw the line between authenticity and disclosing too much?

Chapter 5: Your Leadership Brand, Part 2

- Would you like to share your legacy statement?

Chapter 6: Leadership is a Conversation, Part 1

- Who on your team needs to know what you truly think of them? Who in your life? What feedback or compliment can you give these people that would make a difference for them and maintain their self-esteem?

- What was the best compliment you ever got from your manager?
- Think back to your last interaction with a team member. What was your seek/tell ratio?

Chapter 7: Leadership is a Conversation, Part 2

- Think back to a time when you were surprised by a major development at work.
  - What happened?
  - How did it make you feel?
  - What could your boss have shared with you in advance that would have helped?
  - How did it affect your relationship with your boss going forward?
  - Your colleagues?

Chapter 8: Your Five-Step Conversation Road Map

- Looking at the common leadership styles, which one or ones do you relate to most?

Chapter 9: Nothing Else Matters Unless You Get Results

- Are you a Stresscalator? Think about what gets you the most stressed at work. How can you address it before it becomes a problem for others?

Part 2: Mastery and Leadership Skills

Chapter 10: Hiring and Selecting the Best

- Remember back to when you were hired for a job or picked for a team, committee, or board.
  - What was the process like?
  - Were you a good fit every time?
  - What was missing?
  - What clicked?

Chapter 11: What Your Boss Really Wants From You

- Take a moment to think about all of the bosses you've ever worked for. Or, if you're still pretty new to work, any "boss" type characters you've seen in movies, in books, or on television.
  - What made them bad?
  - Good?
  - What made them tick?

Chapter 12: Engagement and Retention

- Think about a time when you considered leaving your job.
  - What was missing for you?
  - Did you think things would be different?
  - Did you have needs that weren't being addressed?
- Do you regularly meet with your team members to ask about their level of engagement?
  - If so, do you cover all three engagement and retention drivers?
  - If not, how would they react to the questions posed in Figure 12.1?
- What praise did you get from your boss that meant the most?
- How engaged are you? Engagement is all about energy. Engaged leaders create an engaged team. Take a moment to reflect on your personal level of engagement:
  - On a scale of 1 to 4, with 1 being "not at all engaged" and 4 being "highly engaged," how would you rate yourself? And, what impact does your level of engagement have on your direct reports?
  - What will you say to share with your supervisor what matters most to you at work? What ideas will you suggest to your leaders to increase your own interest and job satisfaction?

Chapter 13: Meetings

- Think of five things you've observed someone do or say in meetings that really got your attention in a bad way.
  - What happened?
  - How did others respond?
  - How did you wish they had responded?
  - If you could have done something without getting into trouble, what would you have said or done?

Chapter 14: Coaching

- Think back to anything you've worked hard to get good at. It could be school, sports, dancing, making videos, public speaking, mastering spreadsheets – anything. Do you prefer to learn from your successes or failures?

Chapter 15: Feedback Fundamentals

- Do people in your organization get enough feedback?
  How confident do you feel about giving both positive and constructive feedback? Does your team's performance suffer because people don't get the feedback they need to perform to their potential?
- If Jack Welch was giving a private speech to just your team, would the members' hands raise in response to his question, How many of you get straight-between-the-eyes, honest feedback on your performance?

Chapter 16: Handling Difficult Employee Situations

- When was the last time you became angry (or hurt, or confused) by something someone did or said? What went wrong? How did it resolve? To whom did you turn for advice? What do you wish you had done differently?

Chapter 17: Delegation

- Have you ever had a boss who dumped a task on you, providing little or no instruction regarding requirements or coaching to help you succeed? How did that feel? How did you cope? How do you want to be thought of as a leader – as a delegator or as a dumper?

Chapter 18: Performance Management

- Do you want your boss to tell you how you're doing at work? Do you enjoy doing performance appraisals?

Chapter 19: You and Your Network

- How does your personality help or hinder your ability to network?
- What's your best advice for building your network?

Chapter 20: Influence

- Think about the people in your life who have influenced you to take a risk. What got you to take the leap?
- Your influence opportunity:
  - What idea, alternative, or opportunity requires you to influence others to take action?
  - How does your idea support the organization's goals, values, and objectives?
  - Who are the key stakeholders you need to influence, and why do you need their commitment?
  - What challenges do you anticipate, and what support do you need?

Chapter 21: A Woman's First Leadership Job

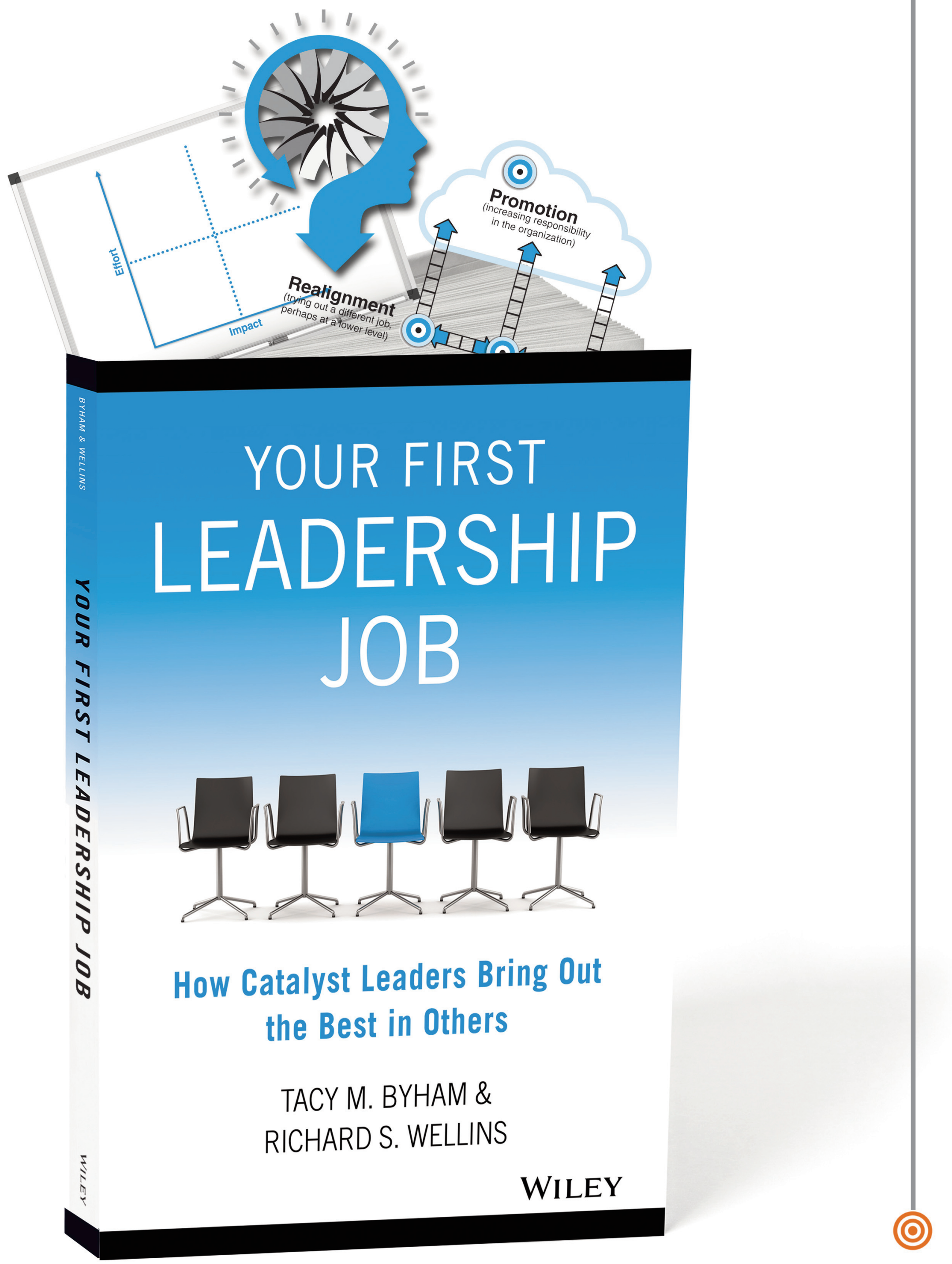
- Take a moment to think about your body language when you join a meeting.
  - Do you slip in late?
  - Take a seat away from the table?
  - Do you walk in quietly? Or, instead strike a power pose?

Chapter 22: Leadership Changes the World

- Do you see leadership as a profession?
- What chapter did you find most valuable?
- How are you going to use the skills you learned about in your leadership position?

Bonus Tool

Catalyst Leader Self-Assessment



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TOOL 2.1

Catalyst Leader Self-Assessment

Catalyst leaders find opportunities to ignite action in others. Are you a catalyst leader? To find out, first select the number for each item that represents your current behavior. Next, add the numbers to determine your catalyst index. Finally, in the column to the right, check (✓) the three boxes opposite the behaviors you want to focus on.

DEMONSTRATES inconsistently:						DEMONSTRATES consistently:	
Tell and assume	1	2	3	4	5	Ask, listen, and learn	❑
Direct and prescribe	1	2	3	4	5	Guide, facilitate, steer	❑
Identify problems and mandate solutions	1	2	3	4	5	Help others recognize and solve problem	❑
Criticize	1	2	3	4	5	Provide balanced feedback	❑
Have all the answers	1	2	3	4	5	Ask for ideas	❑
Withhold information and feelings	1	2	3	4	5	Share thoughts, feelings, and rationale	❑
Threaten, intimidate, paralyze	1	2	3	4	5	Trust, build commitment, mobilize	❑
Focus on people's limitations	1	2	3	4	5	Focus on people's potential	❑
Encourage others' dependence	1	2	3	4	5	Foster interdependence	❑
Maintain the status quo	1	2	3	4	5	Encourage creativity and innovation	❑
Do it all alone	1	2	3	4	5	Support development of others	❑
Have a self-centered outlook	1	2	3	4	5	Have a team-centered outlook	❑
Take over and control	1	2	3	4	5	Provide support without removing responsibility	❑

Your catalyst index: ____________________ **(total of the scores above)**

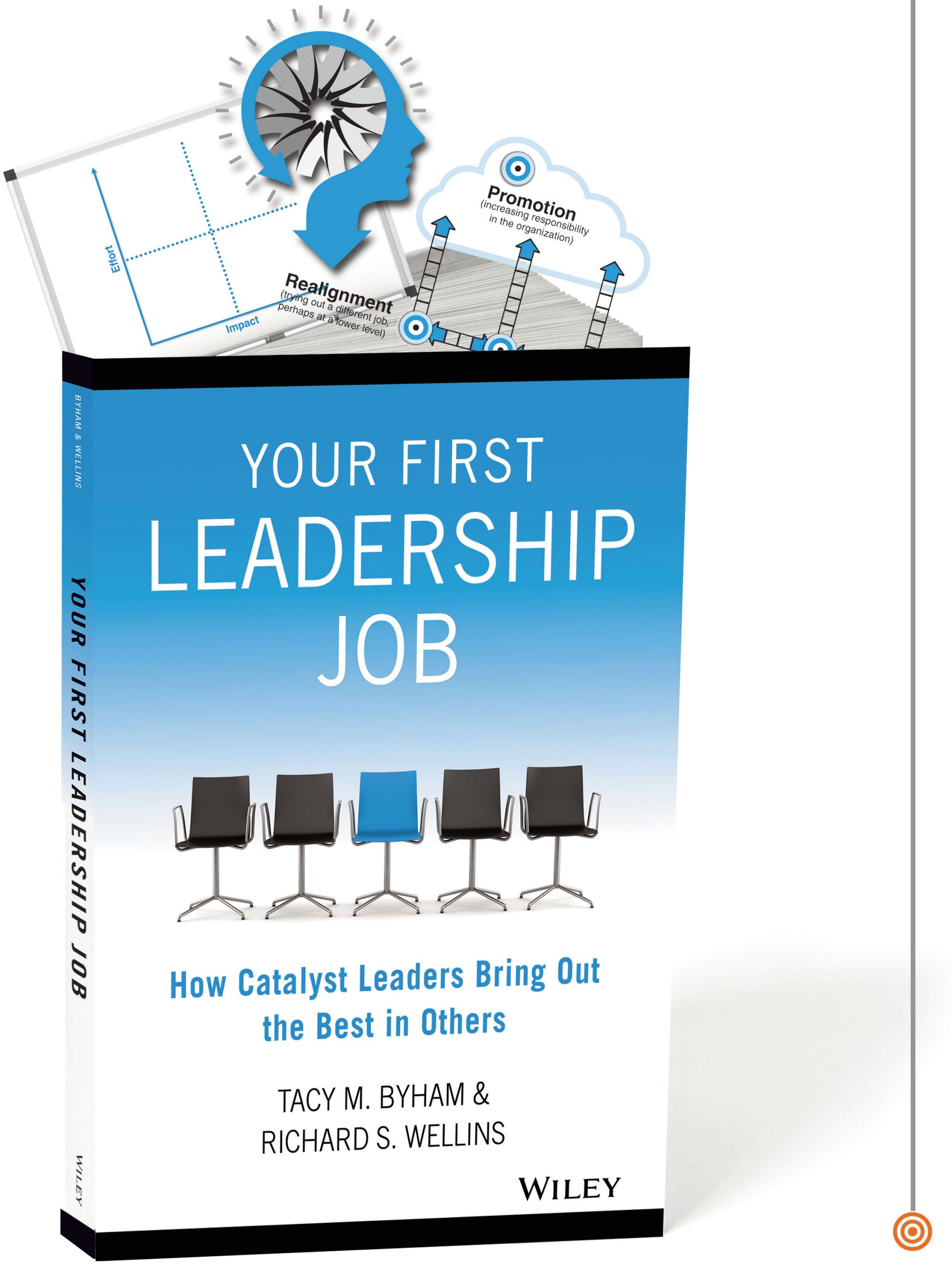
50–65 You already are a catalyst leader, but you can still improve by selecting a few behaviors to work on.

30–49 You have a good start. Choose three areas you really want to work at.

13–29 As a newer leader, you have multiple opportunities for improvement.

Bonus Tool

Success Profile Checklist



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TOOL 2.2

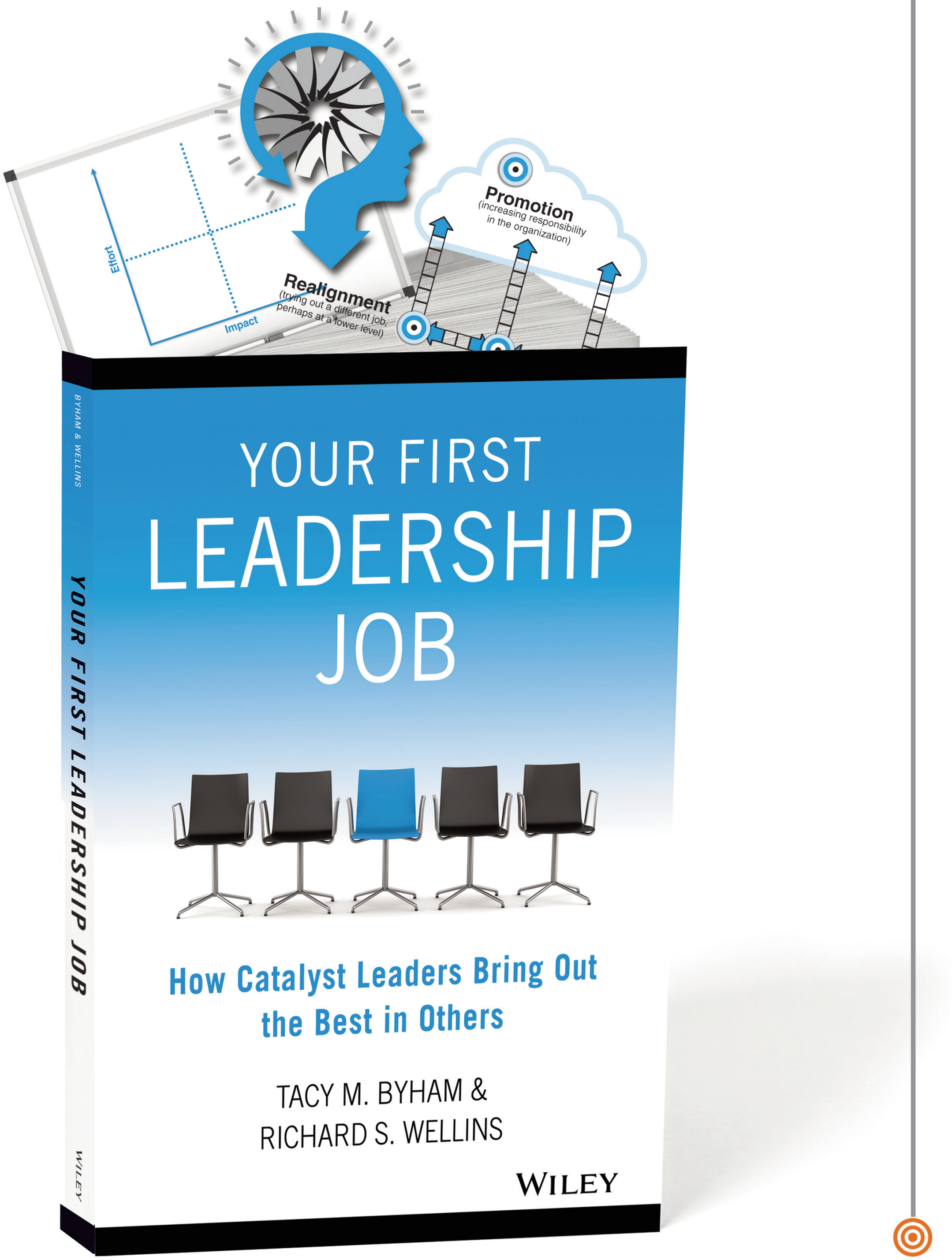
Frontline Leadership Success Profile

Write an "S" in each box that represents a strength. Write a "D" in each box that represents a development need for you.

KNOWLEDGE	COMPETENCIES
❏ In-depth knowledge of your company's products, services, and customers ❏ Understanding of how your team fits into the overall organization ❏ Familiar with various company policies/processes ❏ Business acumen, including understanding company strategy, competition, supply chain, financial metrics ❏ Knowledge of your chosen field *(e.g., finance, marketing, IT)*	❏ Building trust ❏ Delegating responsibility ❏ Planning and organizing ❏ Selecting talent ❏ Facilitating change ❏ Decision making ❏ Coaching ❏ Fostering innovation ❏ Building a successful team ❏ Creating networks
EXPERIENCE	**PERSONAL ATTRIBUTES**
❏ Leading a cross-functional or special team ❏ Providing feedback to others ❏ Coaching/Mentoring ❏ Planning and managing complex projects ❏ Working closely with internal/external customers ❏ Making difficult decisions ❏ Having functional experience in one or more disciplines *(e.g., sales, IT, R&D)* ❏ Navigating organization politics	Enablers: ❏ Enjoys being with other people ❏ Desire to continually learn ❏ High achievement orientation/driver for results ❏ Sensitive to the needs/concerns of others Derailers: ❏ Always seeking praise and approval from others ❏ Overly self-confident, dismissive of others' ideas ❏ Inability to read others' intentions ❏ Indecisive, can't make decisions ❏ Micromanaging/Controlling others ❏ Difficulty controlling emotions

Bonus Tool

New Leader Checklist



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NEW LEADER CHECKLIST

Navigating Your First Six Months

During the coming months you'll want to learn the ropes quickly to rapidly maximize your contributions. Yet, any new transition comes with new things to learn (or unlearn), along with new processes and procedures to follow now that you're in a new role. To minimize your frustrations as a new leader, we have created a comprehensive checklist of activities for the next six months.

As you review the list, you'll notice that there are some basic categories of activities:

- **Administrative**—These are the tactical details aligned with the office space, payroll structure, HR policies, and performance management systems.
- **Training and Development**—Knowledge in this area will ensure that you and your team have the tools you need to perform your job. This might include learning hiring processes and a system to develop your team as well as self-diagnosis to focus on your own development.
- **Social**—The focus here is on the social environment at the office, or what some would call the culture of your team, and the broader company. This aspect of a leadership transition is critical and often overlooked. The connections you form within and beyond your team form a network and enable effective teamwork.

- **Business- and Results-Focused**—These activities will help you understand the business, the priorities for your team, and what it takes to deliver results to your internal and external customers.

The checklist is designed to be a user-friendly, month-by-month guide to navigating your first six months on the job. Many leaders find it helpful to set aside a specific time each month to reflect on progress made from the previous month and plan ahead. If this works for you, block an hour on the first of every month to assess your progress.

The checklist is also segmented into three categories that will aid you as you plan your actions:

Tasks you will do **with your manager**

Tasks you will do **with your team**

Tasks you will accomplish **on your own**

These guideposts should help you plan your leadership "first steps" for the next six months. And, speaking of six months, the list is divided into three, two-month time periods because it's impossible to attempt everything at once. The timing is heuristic, based on wisdom from hundreds of thousands of first-time leaders who said in hindsight, *I wish I had known to "learn this," "do that," or "talk to others" when I first got started.* It's inevitable that tasks will slip back a month or two. No worries, just make sure you're making progress.

And, you're not alone. You're on a journey supported by your family, friends, colleagues, boss, and your organization. We used the word "journey" purposely. Because, as opposed to "taking take a trip" or "traveling overseas," you're on a leadership journey. And if you use this checklist, it's a journey for which you've prepared and on which you'll grow. Why? Because the word "journey" alludes to some type of discovery resulting in a change. We know you'll be different when you reach your destination.

And this is what we expect of you. No doubt, your mind-set and, in turn, your behavior will change. As a result of acting on the tasks and skills you've learned in this book, you'll be thinking and doing things differently. You'll be the best version of you as a leader.

So, let's get started.

YOU AND YOUR MANAGER

- [ ] **With your manager, clarify your new job and their expectations of you.**
  - Job description.
  - Expectations and what you're being held accountable for in the next 3, 6, and 12 months.
  - Scope/limit of decision-making authority.
  - When to involve your manager.
  - What additional areas you may now become involved in.
  - Percentage of time to be spent on leadership activities versus project management (coach versus player).
  - How you fit into the larger picture.

  (Use the "What Do I Need to Know" tool from Chapter 3 to interview your boss regarding expectations for you in this role.)

- [ ] **Seek to understand the business.**
  - Talk to your manager (and other managers) to determine what makes your area productive and growing.
  - What are your organization's one-, three-, and five-year plans? How does your group support these?
  - Understand how your team fits into the bigger picture (if you're new or weren't 100 percent clear as an individual contributor). Understand what occurs in work flow up and downstream from your team/department.
  - Seek to understand what is top of mind for senior leaders (e.g., listen to a quarterly earnings call).
  - Understand your organization's current key strategic priorities.
  - Explore how you and your team add value (the access to information and vantage point of some information is different now—formerly an individual contributor versus now a leader—there's a difference in how you'll support the key priorities).
  - Understand financials and the importance of them to your business.

❑ **Prepare yourself to manage former peers who are now direct reports.**

- Discuss with your boss how to handle former peers (see tips in Chapter 5).

❑ **Leverage your network via your manager.**

- Ask your manager to be a connector within your purposeful network strategy.

❑ **Share the team's small, medium, and large successes with your manager.**

YOU AND YOUR TEAM

❑ **Prepare yourself to manage former peers who are now direct reports.**

- Discuss with your boss how to handle former peers (see tips in Chapter 5).

❑ **Explore the team's unwritten rules if you are joining an intact team.**

- Determine who can help you explore these quickly.

❑ **Establish your approach to team meetings.**

- Determine if you'll make changes from the current meeting process—frequency, format, and structure.

❑ **Create or update the team charter.**

- Do you need to create one or modify the current one?
- Discuss and gain agreement with your team on:
  - Purpose
  - Goals
  - Commitment
  - Trust
  - Processes
  - Communication
  - Boundaries
  - Rules of the road
  - Results—make visible each month to track progress

You and Your Team MONTHS 1 TO 2

❑ **Create a one-pager about yourself to share with your team members. This will speed on-boarding.**

- Many executives use one-pagers as they transition into a new organization. They allow you to share your style, approach, expectations (e.g., do you require a 20-page report or an executive summary), and personality enablers/derailers. This approach helps the team understand you on a different level than through your resume and your reputation. Overall, it also helps to build trust very early on, and it jump-starts a productive, effective transition into the team.
- There's no one right way to craft your one-pager, but some items might include:
  - Your work styles and habits (e.g., like to work late).
  - How you like to work best (e.g., 24-hour turnaround on emails, executive summary versus full reporting).
  - A bit about yourself personally–bio.
  - Your expectations.
  - How you like to be kept informed.
  - Relationships.

❑ **Meet with each team member one-on-one and get to know your team:**

- Get to know the members—what are their interests, strengths, skills?
- Understand their roles—how do they like to work?
- What has worked well for them on previous teams?
- How are they feeling about you?
- What can you do to continue to support them?

What advice would you give to a colleague who is pursuing a leadership position for the first time?

I would say, "Assess your team very quickly before you even think about the bigger tasks you want to achieve to make sure you have all of your tools ready before you start with the work."

—**UK finance leader,** building products company

- ❑ **Focus on your team's development.**
  - Review each team member's past/current performance plans and long-term development plans.
  - Adjust as necessary.
- ❑ **Celebrate and reinforce small, medium, and large successes with the team.**

YOU

- ❑ **Create a networking strategy.**
  - Determine who is/should be in your network now. Who will help you move through the ambiguity of your role and get things done?
  - Reach out to network contacts and directly ask for their support.
  - See tip in Chapter 19.
- ❑ **Establish a feedback mechanism and make it part of your ongoing routine.**
  - How can you get feedback on your leadership skills from your direct reports? Your manager? Your mentor (see "Seek out a coach/mentor in your organization" on the next page)?
  - Target one person from your network for the first six months.
  - See the importance of receptivity to feedback in Chapter 5.
- ❑ **(If new to your organization) Learn about the company's performance management system.**
  - What process, including timing, is used? What forms are required?
  - How do you navigate the system, if online?
  - What are the expectations for the manager and team members around the system?
  - How do priorities cascade from your manager down to you, and, in turn, from you down to your team?

You

MONTHS 1 TO 2

❑ **Get up to speed on formal HR processes.**

- Meet with HR to understand policies, systems, ethics, and guidelines for employees (e.g., time off, vacations, harassment).
- Begin to understand other HR processes such as selection, managing poor performance, making job movement/status changes, documenting personnel moves (e.g., Personnel Action Form), and compensation (i.e., ranges, timing, and process for increases).

❑ **Seek out a coach/mentor in your organization.**

- An outside perspective, from someone who is not your boss, can be invaluable. The individual can be within your organization, your function, or sit in a different department.
- Research on mentoring suggests that when asked, other leaders will say *yes!* So, don't be afraid to reach out and ask.
- This person would:
  - Serve as professional role model.
  - Examine new ways of thinking.
  - Explore and discuss ideas and issues within a confidential environment.
  - Provide constructive feedback/reinforce effective performance.
  - Recommend learning opportunities.

❑ **Join or create an affinity group of new leaders, all working through their first leadership job together.**

- Use social media or monthly lunches to lean on each other for support.
- These types of groups are:
  - A commitment to developing yourself and others.
  - An opportunity for guidance and assistance in becoming a competent leader.
  - A forum for ideas and concerns.
  - Connections with more experienced professionals who are willing to share personal experiences.
  - Sources of coaching—sometimes providing encouragement and at other times, a gentle push.
  - A way to develop deep personal and professional friendships.

You

MONTHS 1 TO 2

❑ **Identify tasks and responsibilities you can delegate to achieve key business results and develop your team's capabilities.**

- Identify delegation opportunities within the current work you do. Consider how much authority you wish to delegate and aspects of scope, expectations, and time constraints.
- Match people to the task/responsibility. Consider the capabilities that individuals and/or teams need to develop.
- Plan and communicate the strategy.
- Provide ongoing follow-up and coaching.

❑ **Sharpen your focus on execution.**

- Complete you radar chart (see Chapter 9).
- Share with your manager.
- Share with your team.

YOU AND YOUR MANAGER

❑ **Share the team's small, medium, and large successes with your manager.**

❑ **Focus on your leadership gaps and build from there.**

- **Step 1:** Complete a skills self-assessment:

Whether you're an experienced leader or just getting started, you can hone your skills and knowledge in all areas of leadership. These areas can be categorized into seven Leadership Imperatives. Rank your current skill in each one by numbering them from 1 (most skilled) to 7 (least skilled):

_____ Coach and Manage Performance

_____ Manage Change

_____ Build Engagement and Trust

_____ Make Decisions and Drive Results

_____ Influence, Network, and Partner

_____ Inspire Innovation

_____ Select, Develop, and Retain Talent

- **Step 2:** Discuss your prioritization with your manager:
  - Choose 1-2 strengths to optimize as well as your personal motivations.
  - Choose 1-2 to develop.
  - Think about those that will help you use your experiences and what you've learned.
- **Step 3:** Document an individual development plan:
  - Document and review with manager; discuss how progress will be monitored.

❑ **Take stock of your team members, align with the key business priorities for your team over the next year, and discuss with your manager.**

- Opportunities
- Motivations
- Current accountabilities (e.g., projects)
- Past performance (e.g., barriers, preferences)

- Technical knowledge/skills audit against the productivity and growth target and gaps
- Teamwork/cooperation
- Planning and organizing
- Judgment and decision making
- Strengths to leverage/development areas
- How you will develop them

YOU AND YOUR TEAM

❑ **Meet with team members individually.**

- How are they feeling about you?
- What can you do to continue to support them?

❑ **Focus on accountability.**

- Identify who is accountable for each critical project/task/accountability.
- Conduct a goal-setting discussion.

❑ **Identify key barriers/bottlenecks to productivity.**

- Quantify them.
- Work with the team and determine how to reduce or eliminate them.
- Identify their origination point and how to reduce them early in the process.

❑ **Adopt a measurement focus.**

- With your team, identify (or create) lead and lag measures for the critical projects/tasks/accounts.
  - How robust are they?
  - How visible?
  - How aligned with the business?
- Discuss lead and lag measures with your manager, then with the team.
- Set up reporting mechanisms.

❑ **Celebrate and reinforce small, medium, and large successes with the team.**

MONTHS 3 TO 4

YOU

- [ ] **Continue to sharpen your focus on execution.**
    - Revisit your radar chart (see Chapter 9).
    - Share progress and insights with your manager.
    - Share progress and insights with your team.
- [ ] **Complete a delegation recheck.**
    - Provide ongoing follow-up and coaching for previously delegated tasks/responsibilities.
    - Further analyze tasks and responsibilities you can delegate.
- [ ] **Focus on your customers.**
    - Identify your top internal and external customers.
    - Determine what it takes to delight them.
    - Meet with key customers and learn about your relationship. Investigate whether they're using your products and services as well as their expectations for the future.
- [ ] **Identify barriers to effective team dynamics.**
    - Identify sources/triggers.
    - Isolate or reduce sources/triggers.
    - Keep a count of occurrences by month.

YOU AND YOUR MANAGER

- [ ] **Share the team's small, medium, and large successes with your manager.**
- [ ] **Analyze your group's status via a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis.**
  - Consider your team's strengths, weaknesses, opportunities, and threats.
  - Draft a list and share with your manager.
- [ ] **Update your development and performance plan and engage in a midyear progress check with your manager.**
- [ ] **Discuss what you see as future direction and opportunities for your team.**
  - Schedule a visioning session with your team and invite your manager to attend. As a group, conduct a SWOT analysis.
  - Develop solutions/ideas that help to mitigate risks.

YOU AND YOUR TEAM

- [ ] **Meet with team members individually.**
  - How are they feeling about you?
  - What can you do to continue supporting them?
- [ ] **Ask team for feedback on your skills.**
  - Coaching
  - Delegating
  - Developing others
  - Setting performance goals
- [ ] **Analyze customer complaint data with your team.**
  - Review and categorize internal and external complaints.
  - Determine how to address current issues.
  - Draft a plan to prevent future issues.

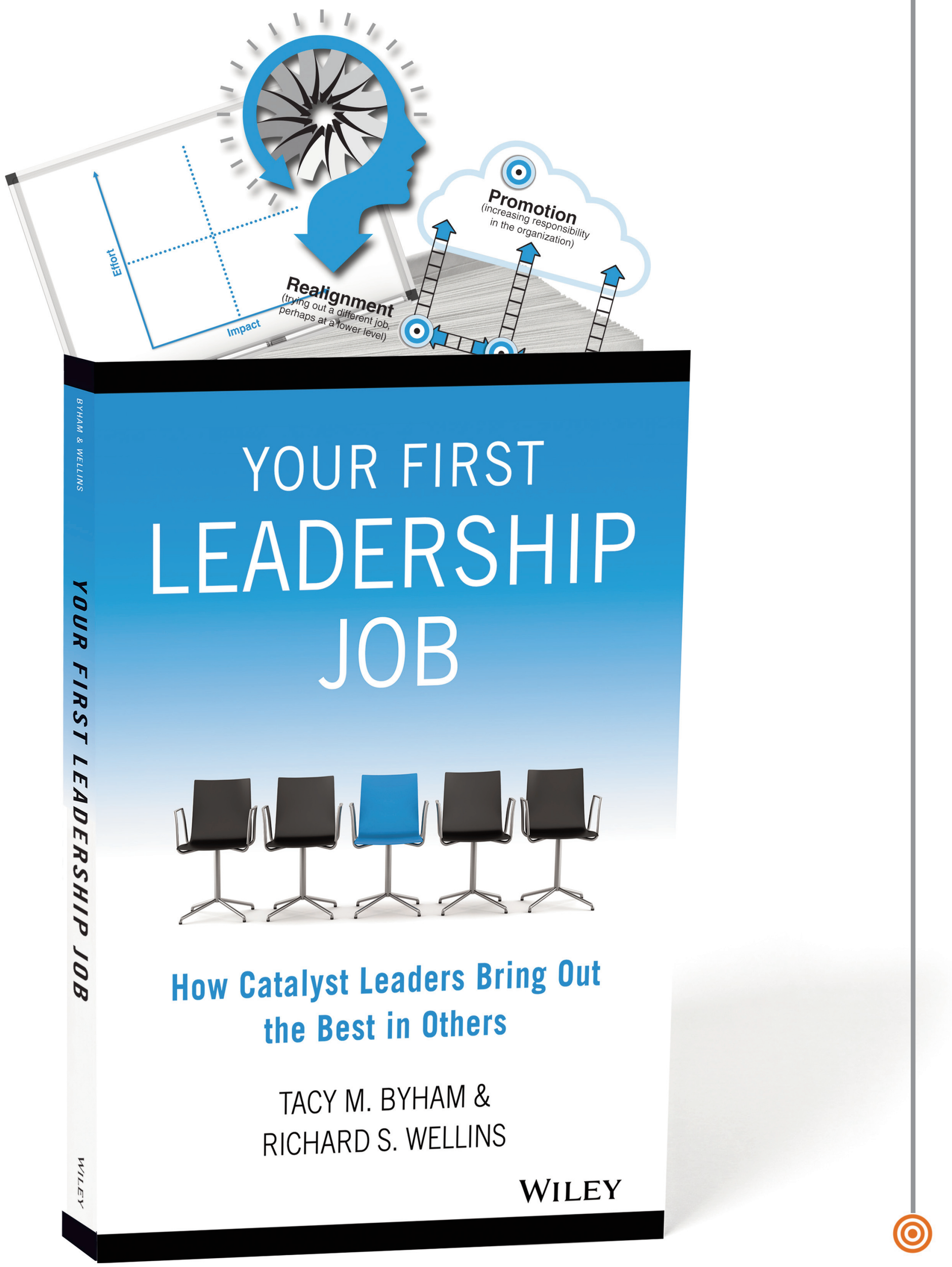
- ❑ **Analyze your internal partnerships and networks.**
  - Determine which relationships can be classified as strong or weak for your team.
  - Work with your team to improve the weak working relationships and determine how to build or maintain strong relationships.
- ❑ **Conduct a progress check for the team's performance and values alignment, comparing month six to month one.**
- ❑ **Discuss five factors (process, trust, communication, commitment, results) affecting team performance; agree on plans to improve.**
- ❑ **Celebrate and reinforce small, medium, and large successes with the team.**

YOU

- ❑ **Complete a delegation recheck.**
  - Provide ongoing follow-up and coaching for previously delegated tasks/responsibilities.
  - Further analyze tasks and responsibilities you can delegate.
- ❑ **Define how to engage team members to take on additional responsibility based on skill, motivation, and business need.**
- ❑ **Determine how you'll continue to balance your new role.**
  - Unfortunately, it is a myth that when you become a leader your time will be focused on leading and that you'll no longer serve as a functional expert (e.g., marketing leader versus marketing practitioner).
  - Our advice: learn to be a leader but continue to stay current in your functional area.
  - Seek advice from peers in your cohort group.
- ❑ **Assess how effectively you're spending your time (using past two calendars).**
  - Are you being too reactive?
  - Are you doing too much of the team's job yourself?

Bonus Tool

Never Do/Always Do



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TOOL 4.1

Never Do/Always Do

When I thought about becoming a leader, I vowed that I would:

NEVER DO . . .	ALWAYS DO . . .

Think about it:

Why did you say you would never do that?
Were those actions hurtful? Did they affect morale or productivity?

Why did you say you would always do that?
How did it make others feel? What positive effects did it have on the group?

Spoiler alert: Thinking through this tool is necessary to complete the final exercise in the next chapter. Don't skip! It's important.

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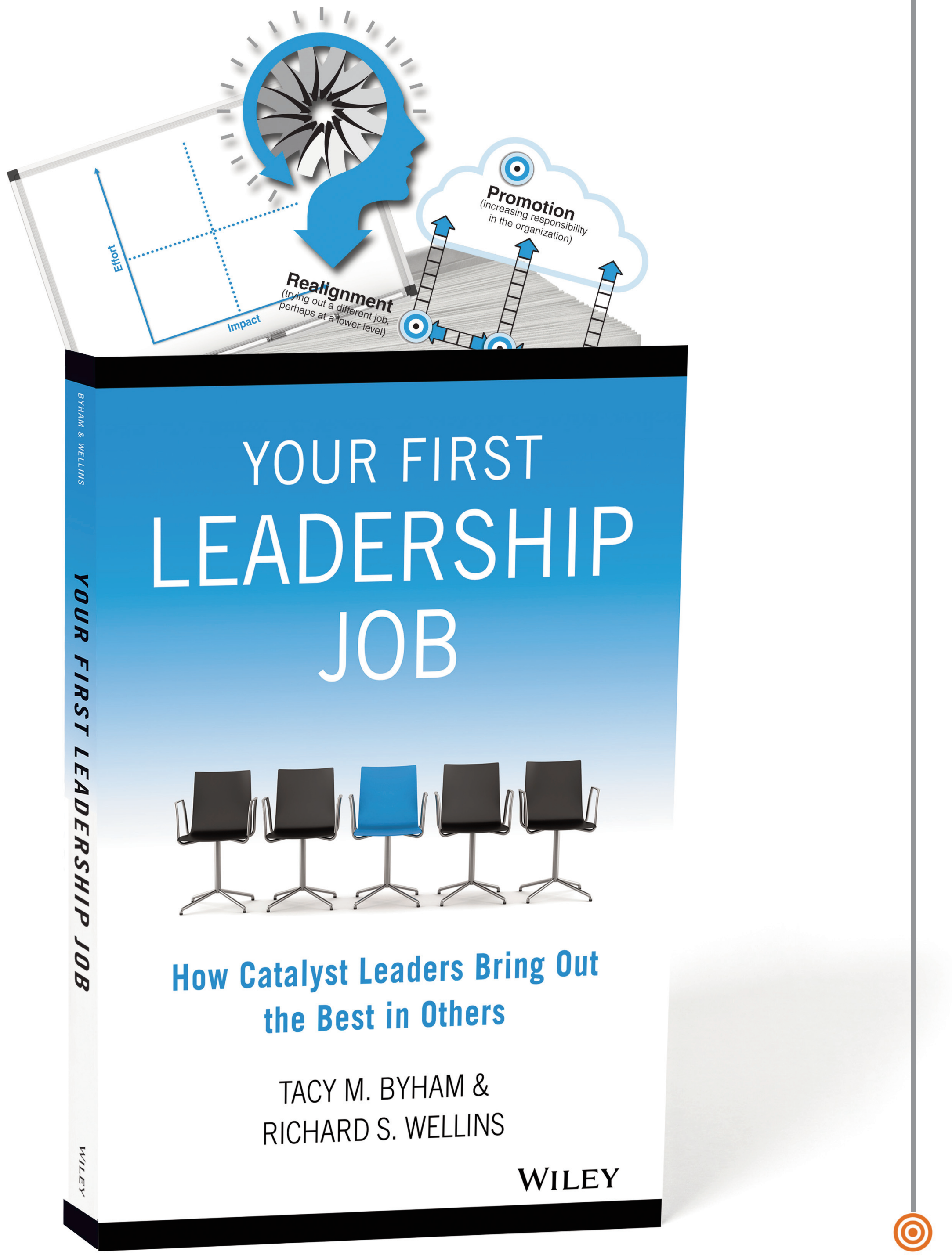
Bonus Tool

Interaction Essentials℠

What They Are and Why They Matter



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INTERACTION ESSENTIALS℠:
What They Are and Why They Matter

by DDI'S Center for Applied Behavioral Research

Human beings are social creatures. In daily lives and our work, we are constantly interacting with others. Whether these interactions happen face-to-face, over the phone, or through e-mail or text, the way we treat others and how we communicate with them makes an impact—for better or worse. So what are the skills required to conduct effective interactions day-to-day? Through our 40+ years of assessing talent, conducting research, and creating development programs, we have found that there exists a core set of skills everyone needs to master in order to effectively build relationships and get work done. We call these skills the Interaction Essentials℠.

We refer to them as the Interaction Essentials because they are the core behaviors that make leaders and associates effective. These skills help individuals meet both personal needs (to be respected and involved) and practical needs (through an effective communication structure). DDI believes so strongly in the use of the Interaction Essentials that we incorporate them as foundational elements of many of our learning and development programs. For example, the Interaction Essentials are incorporated into training and development programs such as Interaction Management® and Business Impact Leadership®, and in Targeted Selection® for training interviewers. They are also incorporated into selection solutions, such as interview guides. These essentials have been woven into DDI's products and solutions, instituting a consistent development method across all levels of the organization.

PRINCIPLES TO HELP A PERSON MEET OTHERS' PERSONAL NEEDS

1. Maintain or enhance self-esteem.
2. Listen and respond with empathy.
3. Ask for help and encourage involvement.
4. Share thoughts, feelings, and rationale (to build trust).
5. Provide support without removing responsibility (to build ownership).

What They Are

The above principles were derived from decades of research demonstrating the positive value of the behaviors they embody. When these five principles are applied, they ensure that employees' personal needs are met and that they feel valued, respected, and understood. They also can have critical implications for the levels of engagement motivation, productivity, and effectiveness with which work is carried out. The following presents the research underlying and supporting the significance of each.

Maintain or Enhance Self-Esteem

Self-esteem refers to one's self-evaluation, or appraisal of one's own worth. It is the second highest need on Maslow's hierarchy. And it can be impacted by all interactions with others. The concept of self-esteem rose to popularity in the late 1960s, pioneered by psychotherapist Nathaniel Branden and psychologist Stanley Coopersmith (who defined self-esteem as an attitude and expression of worthiness). To date, approximately 536 studies, 769 articles, and 80 books have been written on the impact of self-esteem on work performance.

Some of the reported outcomes of high self-esteem include high levels of career and job satisfaction, improved motivation and engagement, high-quality work, better personal and professional relationships, and more innovation at work. Individuals who maintain or enhance others' self-esteem tend to be seen as highly effective and enjoy better team communication and less tension in the workplace. They also are likely to lead employees with higher job satisfaction and performance, greater loyalty, and interpersonal trust.

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Listen and Respond with Empathy

The ability to empathize is an important skill to possess. The modern understanding of empathy—meaning "the identification with or vicarious experiencing of the feelings, thoughts, or attitudes of another"—was first used in the works of sociologist Max Weber and psychologist Wilhelm Dilthey. Empathetic people are more willing to use their time and resources to help people, to enable others to maintain a sense of competence and self-worth, and to avoid behaviors that would betray others' trust.

Within the last 10 years, approximately 550 articles and over 160 books have been written on using empathy in interpersonal interactions.

Leaders who demonstrate empathy with their employees are perceived to be better coaches, while employees who believe their leaders are empathetic tend to be more engaged in their work and less fatigued, depressed, and anxious.

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Ask for Help and Encourage Involvement

Individuals want to feel involved, to feel as though their opinions and thoughts matter. At work this translates into leaders and team members reaching out to one another for support. A high-involvement work environment began as a trend in the 1970s, but has since become the norm in highly effective organizations. In the last 10 years, over 915 articles and 19 books have been written on high-involvement work environments.

Leaders are seen as more effective when they create a participative work environment. Employees in such a high-involvement work environment perceive that they have more variety, autonomy, and impact along with a greater level of influence in their jobs. They also report a higher degree of job satisfaction, more trust in management, and increased self-confidence.

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Share Thoughts, Feelings, and Rationale (to build trust)

In the workplace, sharing thoughts, feelings, and the rationale behind decisions builds a more trusting environment. When leaders and team members open up, they encourage others (direct report, colleagues) to do the same. This open communication also fosters a positive team dynamic, making everyone more productive.

The concept behind this principle was pioneered in the 1970s by sales and marketing expert Neil Rackham in his pivotal research study on sales effectiveness in major multinational companies. Rackham's research focused on the impact of interaction skills training and the importance of motivation and emotions during work interactions. He demonstrated that, to build trust, leaders need to disclose their own thoughts and feelings. According to his research, trust in leadership is a critical requirement for employees to have, and their degree of trust affects overall organizational and work group effectiveness, employee satisfaction with leadership, and the overall level of innovation.

In the last 10 years, more than 100,000 articles and studies and 4,780 books have been written on building trust in the workplace.

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Provide Support without Removing Responsibility (to build ownership)

Providing support is a critical role of a manager or team member. The interconnectedness of today's workplace means it is difficult to do a job without anyone's help. However, when seeking help, it is important for the support to come without removing the ownership of the task. This is how individuals learn, grow and develop in their roles. The ability to provide support without removing responsibility is the driving force behind this sense of empowerment.

In the last 10 years, approximately 7,000 articles and 1,500 books have been written on empowerment in the workforce. This body of research demonstrates multiple individual and organizational benefits of empowering and encouraging employees to psychologically own their jobs.

Managers are seen as more effective when they perform supportive behaviors without taking over, delegate decision making, provide a culture of continuous improvement, and balance trust and feedback. They must also coach their team members to help them be more successful, without telling them what to do or removing their ownership or responsibility. Organizational benefits of increased empowerment include improved productivity, product quality, customer service, employee satisfaction, and team performance; gains in market share and customer satisfaction; and a reduction in production costs.

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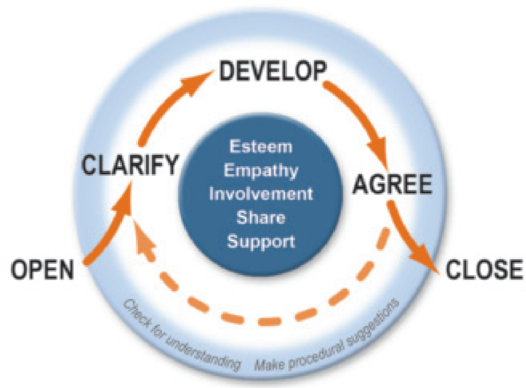
GUIDELINES FOR HOW TO MEET PEOPLE'S PRACTICAL NEEDS *(TASK SKILLS)*

What They Are

In addition to ensuring that personal needs are met, DDI developed guidelines over 40 years ago to provide structure and best practices for effective interactions to meet practical needs. In day-to-day interactions with coworkers, these guidelines help provide structure to maximize the effectiveness of those conversations to influence others, solve a problem or make better decisions. These guidelines (Open, Clarify, Develop, Agree, and Close) focus on the practical side of interactions because relying solely on personal needs without meeting people's practical needs will still result in an ineffective interaction. By using these guidelines, leaders and team members can get work done through others more effectively and efficiently. In addition to the five guidelines, there are additional skills needed to ensure that each person understands what has been discussed and to keep the discussion moving forward. These process skills are: check for understanding and make procedural suggestions.

In today's hectic, performance-oriented workplace, the time spent interacting with others must be productive. Whether interacting with an individual or a group, in a formal or a spontaneous discussion, in person or over the phone, every interaction must accomplish its purpose efficiently. Each guideline represents an important, logical step in the discussion process. Together they provide a road map to guide effective discussions. When these guidelines are applied with the aforementioned skills (empathy, maintaining self-esteem, etc.), they ensure that employees' personal AND practical needs are met, and ultimately better, and more effective interactions.

The content of DDI's model is based on real behaviors exhibited in hundreds of thousands of interactions observed in assessment and training settings. This distinctive model provides a process that can be easily adapted to either personal or professional situations. The process can be used to resolve conflicts, discuss a major change, set expectations, delegate an important responsibility, or conduct any discussion in which you need to clarify the situation, develop ideas, and agree on actions.



OPEN

- At the start of an interaction, let people know what you want to talk about and why it's important.
- If you begin the discussion, explain its purpose and importance.
- If another person begins the discussion, and doesn't explain the purpose and importance, you can:
  – Ask what they want to talk about and why.
  – State your understanding and ask if it's correct.

CLARIFY

- Before you begin discussing ideas or solutions, make sure everyone understands the details.
- Clarify facts, figures, or information that everyone involved in the discussion needs to know to move forward.

DEVELOP

- Cultivate ideas to achieve the main goal.
- Actively seek involvement from all participants.
- Share your own ideas—after listening to everyone else's.
- Where appropriate, use idea generation and evaluation techniques.
- Help people identify any help, support, or resources that might be needed.

AGREE

- Once you have a list of good ideas and alternatives, involve everyone in choosing the ideas to put into action.
- Specify what will be done, who will do it, and by when.
- Return to the CLARIFY step if you have another issue to talk about or proceed to the CLOSE step if there are no more issues. Repeat this process for each issue.

CLOSE

- To make sure everyone understands what's happening, go over the main points of the discussion and what people agreed to.
- Make a final check on everyone's confidence in their ability to follow up on the actions they agreed to.

Process Skill: Check for Understanding

This is a way to confirm that everyone has the same understanding of what has been discussed during the session. The most effective way to check for understanding is to summarize the information in the form of a question and then request confirmation or correction. For example one might say "so what I heard you say is (fill in example), is this correct?"

Process Skill: Make Procedural Suggestions

An effective interaction needs a way to keep the discussion process on track, by identifying problems in the process itself and resolving them quickly. A good example of using this technique is: "We seem to have several alternatives available. Let's narrow our options down to two." This action is about ensuring that goals in the interaction are achieved in a timely manner.

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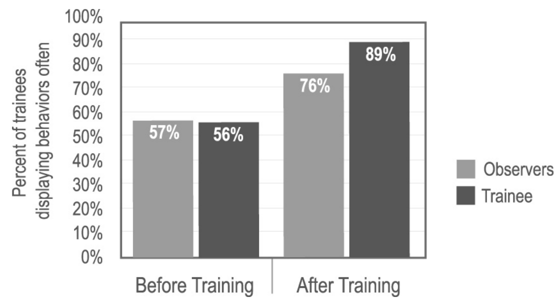
WHY INTERACTION ESSENTIALS MATTER

Why are the Interaction Essentials so critical? Experience and research have shown that the reason most leaders in business fail is not because of a lack of business knowledge or technical skill, but because of interpersonal and communication shortcomings. The most cited reason that people leave their jobs is their relationships with their managers. Even CEOs, in part, fail due to a lack of essential interaction skills (e.g., Paul Ely (HP), Carly Fiorina (HP), John Havens (Citigroup), Stan O'Neal (Merrill Lynch), Bob Nardelli (Home Depot), and Al Dunlap (Scott Paper)). Therefore, there exists a greater need to develop these essential interaction skills.

According to DDI's data, including detailed assessment information on over 4,000 leaders, Interaction Essentials are a clear area for development. This research demonstrates that the Interaction Essentials are more likely to be rated a development need by a leader's managers and peers, compared to any other leadership skill such as coaching, decision-making, and driving change. Specifically, 44 percent of development needs reported by managers and peers are Interaction Essentials in DDI's analysis of a cross-organizational database of 360-degree feedback research (2011).

The good news is that DDI's research also demonstrates that the Interaction Essentials can be trained or improved. And improvements in the Interaction Essentials correlate with improvements in higher-order leadership skills; for example, influence, managing others' performance, and resolving conflict. Data collected from 2,637 leaders and 4,120 of their managers, colleagues, and direct reports demonstrate a 33 to 59 percent improvement in the number of leaders frequently meeting others' personal needs after leadership training (see Figure 1). Specifically, when it comes to the behaviors related to meeting personal needs discussed earlier, only about 57 percent of leaders were doing that effectively before training. After training, that number rose to 76 percent according to leaders' managers, peers, and direct reports, and up to 89 percent according to leaders themselves—a significant improvement.

Figure 1. Improvements in Meeting Personal Needs After Training



Because leaders who master the foundational interaction skills will be more skillful in navigating other leadership behaviors (e.g., coaching, managing performance, influencing others), it is no surprise that this type of training has a significant impact on other leadership behaviors and even organizational outcomes. In addition to improvements in communication, teamwork, efficiency, and quality of work, employees who rated engagement and productivity higher in their work groups were significantly more likely to have leaders who effectively met the personal needs of others. In other words, employee engagement and productivity were affected by the extent to which leaders met the personal needs (see Figure 2 and 3) and the practical needs (see Figure 4 and 5) of others.

Figure 2 shows that when employees reported reduced engagement in their work environment, only 54 percent of them also reported that their leaders were meeting their personal needs. In contrast to employees who reported improved engagement, an overwhelming 89 percent reported their personal needs being met by their leader.

Figure 2. How Meeting Personal Needs is Related to Improved Engagement

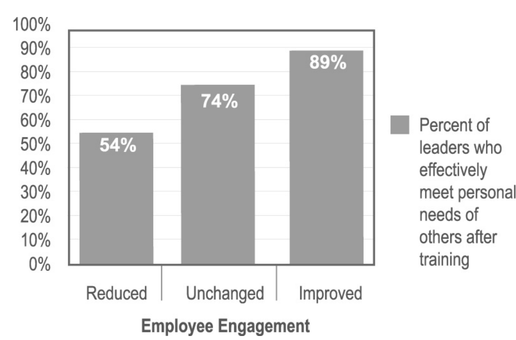


Figure 3 shows a similar finding, such that for employees who reported reduced productivity in their work groups, only 60 percent of them reported that their leaders were meeting their personal needs. In contrast to employees that reported improved productivity, 86 percent of them reported their personal needs being met by their leader.

Figure 3. How Meeting Personal Needs is Related to Improved Productivity

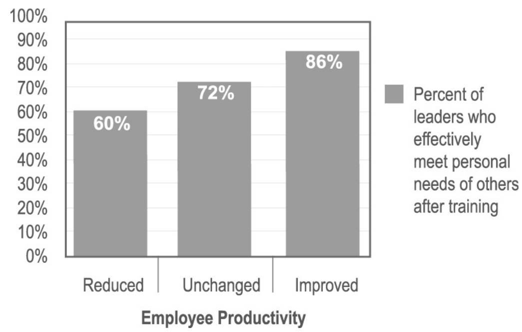


Figure 4 demonstrates the same trend for meeting practical needs. Specifically, when employees reported a leaders' ability to create and maintain a supportive work environment as low, only 2 percent of them reported that their leaders were effectively meeting their practical needs. In contrast to employees who reported their leaders' ability to maintain a supportive work environment as high, 87 percent of them reported their practical needs were being met by their leader.

Figure 4. How Meeting Practical Needs is Related to Improved Engagement

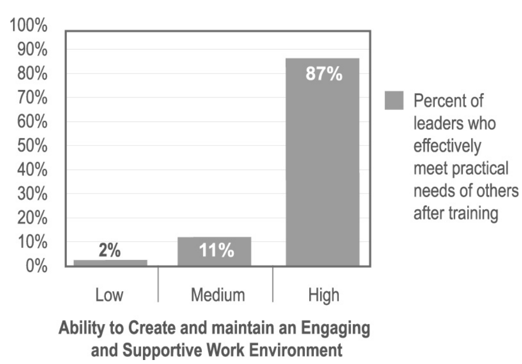
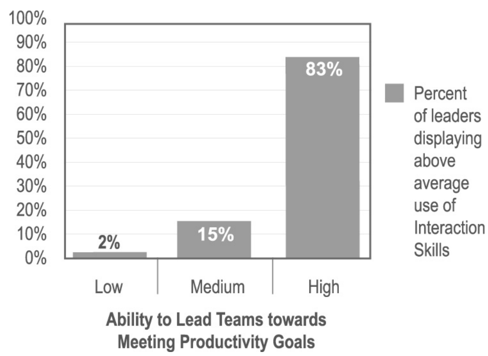


Figure 5 displays the finding that when employees reported a specific leaders' ability to lead teams towards meeting productivity goals as low, only 2 percent of them reported that their leaders were effectively meeting their practical needs. In contrast to employees that reported their leaders' ability to lead teams towards meeting productivity goals as high, 83 percent of them reported their practical needs were being met by their leader.

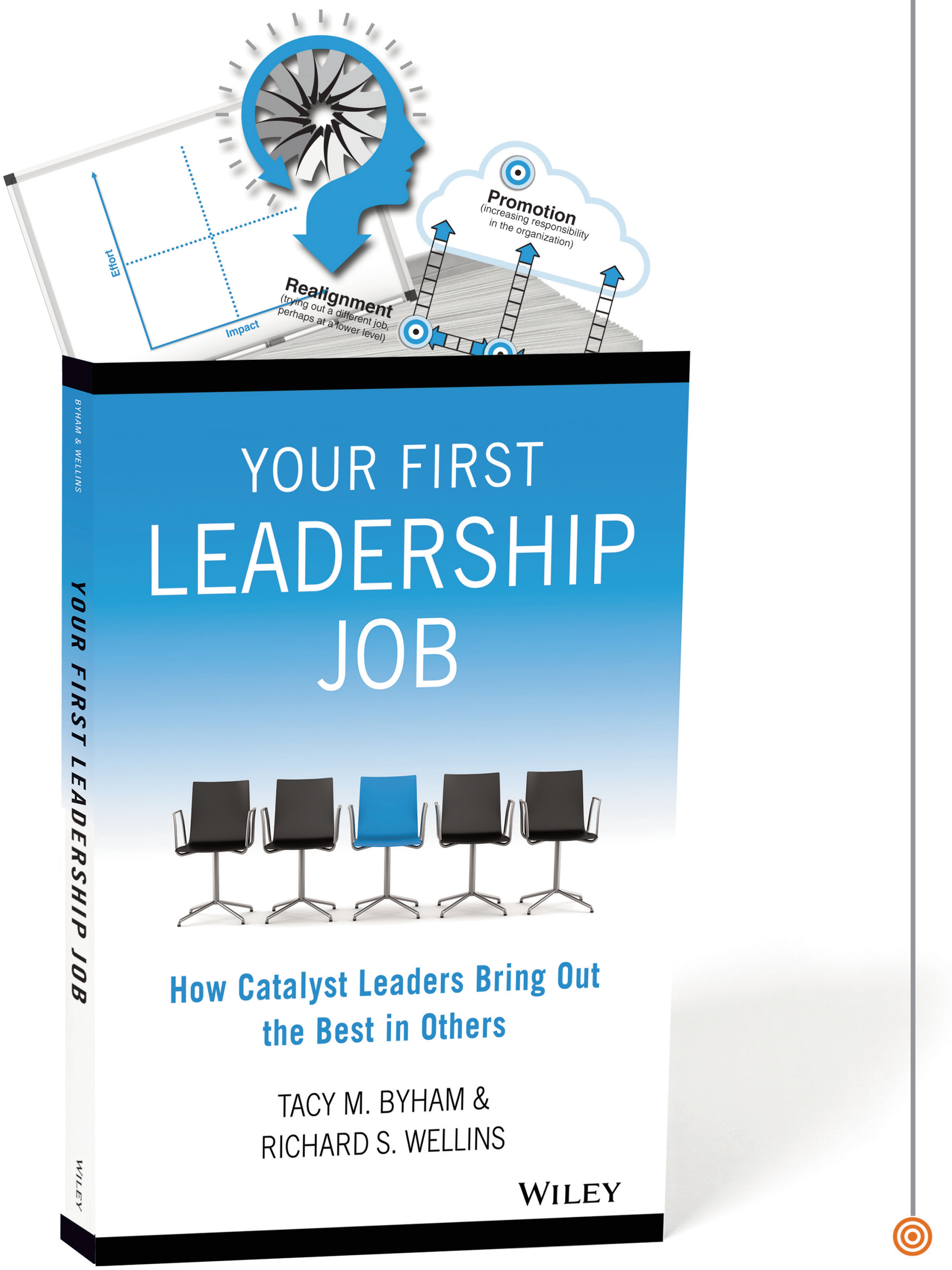
Figure 5. How Meeting Practical Needs is Related to Improved Productivity



In summary, research supporting both the theory behind and the practice of using the Interaction Essentials is abundant and persuasive, and that is the reason that they are at the core of many of DDI's programs and solutions. Because the Interaction Essentials are the foundation upon which all effective interactions are based, they are critical skills for everyone to have in order to foster supportive and productive relationships. They are of particular importance to leaders because research demonstrates that without the fundamental interaction skills, leaders will not be equipped to handle their responsibilities of keeping their employees engaged, satisfied, motivated, and, of course, productive.

Bonus Tool

Discussion Planner



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TOOL 8.1

Discussion Planner

Discussion with ____ Date ______________

Topic/Issue to discuss ____

Key Principles *(to meet personal needs)*

- ❑ **Esteem**
  - Be specific and sincere
- ❑ **Empathy**
  - Describe facts and feelings
- ❑ **Involvement**
  - Unleash ideas with questions
- ❑ **Share**
  - Disclose feelings and insights to build trust
- ❑ **Support**
  - Specify the level of support you'll provide

MY APPROACH

What are my objectives for this discussion?

How will I know I've accomplished these objectives?

What personal needs of the person/team do I need to consider?

Interaction Guidelines *(to meet practical needs)*

Time

❑ **1. OPEN**
- Describe purpose of discussion
- Identify importance

❑ Make procedural suggestions
❑ Check for understanding

❑ **2. CLARIFY**
- Seek and share information about the situation
- Seek issues and concerns

❑ Make procedural suggestions
❑ Check for understanding

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TOOL **8.1** *cont'd*

Discussion Planner *(cont'd)*

Interaction Guidelines *(to meet practical needs)*

Time

- [ ] **3. DEVELOP**
  - Seek and discuss ideas
  - Explore needed resources/support

- [ ] Make procedural suggestions
- [ ] Check for understanding

- [ ] **4. AGREE**
  - Specify actions, including contingency plans
  - Confirm how to track progress and measure results

- [ ] Make procedural suggestions
- [ ] Check for understanding

- [ ] **5. CLOSE**
  - Highlight important features of plans
  - Confirm confidence and commitment

- [ ] Make procedural suggestions
- [ ] Check for understanding

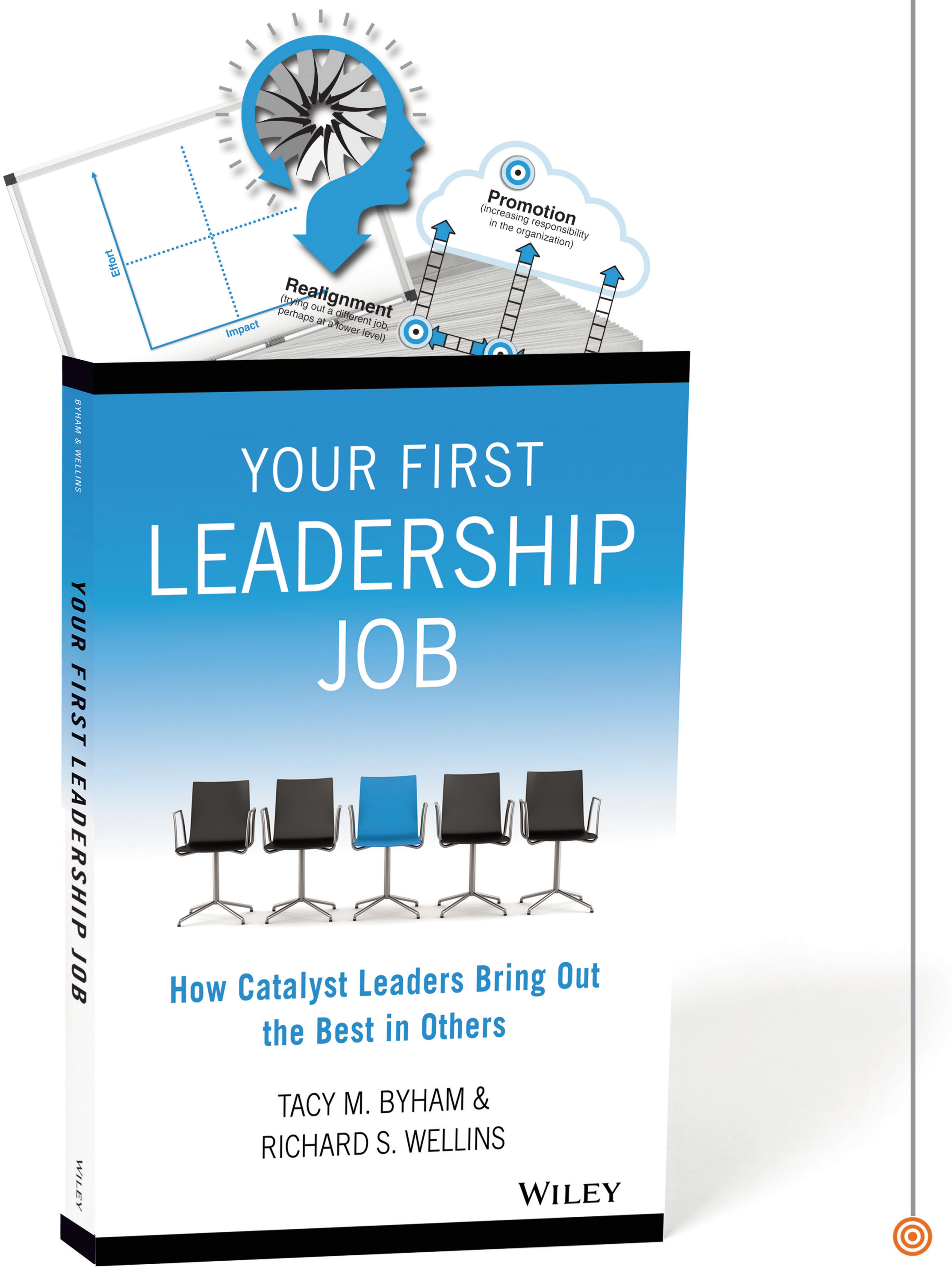
Post-Discussion Notes

- What did I say or do to use the skills effectively?

- What could I say or do to use the skills more effectively next time?

Bonus Tool

Execution Self-Assessment



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TOOL 9.1

How Well Do I Execute?

Read the set of statements for each essential element. For each statement, select the number that best represents the frequency with which you currently take that action. Use the rating scale below. Answer frankly so you can target your strengths and areas for improvement. Add your ratings for each element, writing your total on the line provided.

Rating Scale:
1=Seldom or Never 2=Sometimes 3=Often 4=Always or Almost Always

FOCUS				
1. I invest my time and energy in the few most critical priorities that my team is responsible for achieving.	1	2	3	4
2. I inform my team members of our most critical priorities and how they support the organization's goals.	1	2	3	4
3. When distracted by urgent matters, I quickly refocus myself and my team on what's important.	1	2	3	4
4. I anticipate potential barriers and concerns.	1	2	3	4

TOTAL: ____________

MEASUREMENT				
5. I measure the right things, so I know when my team has achieved our priorities.	1	2	3	4
6. I consistently use milestones to help my team determine what might need to be adjusted.	1	2	3	4
7. I establish deadlines and clear definitions of success for high-priority work.	1	2	3	4
8. I make our priorities and our progress toward them visible for my team members.	1	2	3	4

TOTAL: ____________

TOOL 9.1 *cont'd*

Rating Scale:
1=Seldom or Never 2=Sometimes 3=Often 4=Always or Almost Always

ACCOUNTABILITY				
9. I make sure that each action needed to achieve our priorities is carried out by the appropriate team member.	1	2	3	4
10. I establish monitoring and follow-up procedures with the accountable team members.	1	2	3	4
11. I provide the coaching and feedback that team members need in order to achieve our priorities.	1	2	3	4
12. To each accountable team member, I communicate up front the consequences (both personal and higher level) of accomplishing his or her work successfully and unsuccessfully.	1	2	3	4

TOTAL: ____________

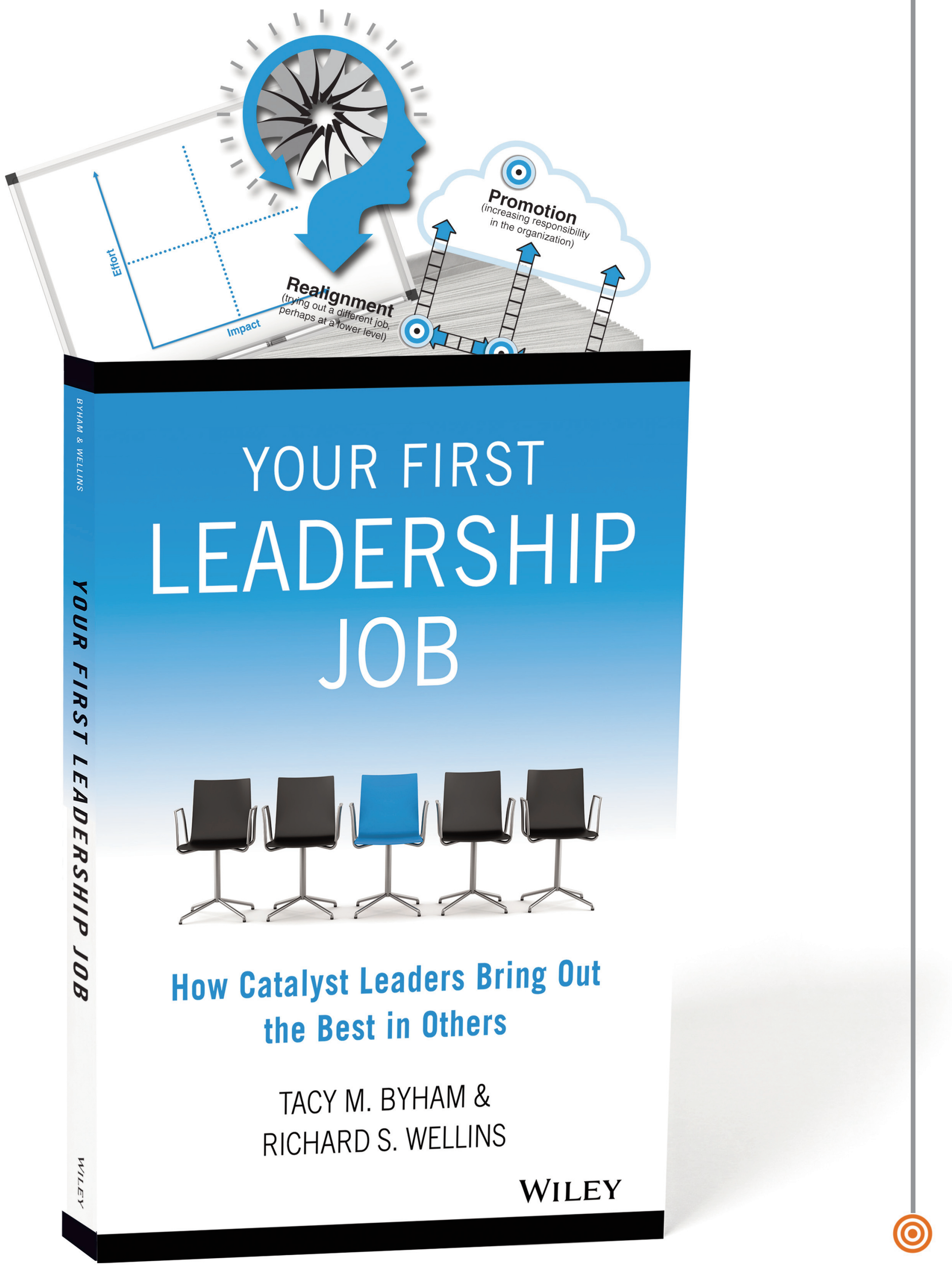
Which element had the *highest* total? ____________

Which element had the *lowest* total? ____________

How did you do? Are you surprised by the results? If you're like most first-time leaders, you'll have scored lower than you hoped on all three elements. Or, if you're a bit more seasoned, you're saying, "Ah, I never knew how much attention I needed to give to measurement." This chapter is rich with content, tools, tips, and exercises that will help you develop the skills and tactics you'll need to execute a strategy consistently and with confidence. You'll find it helpful to use some of them, like the radar chart (Tool 9.4), throughout your career.

Bonus Tool

Identifying Your Top Priorities



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TOOL 9.2

Identifying Your Top Priorities

Instructions:

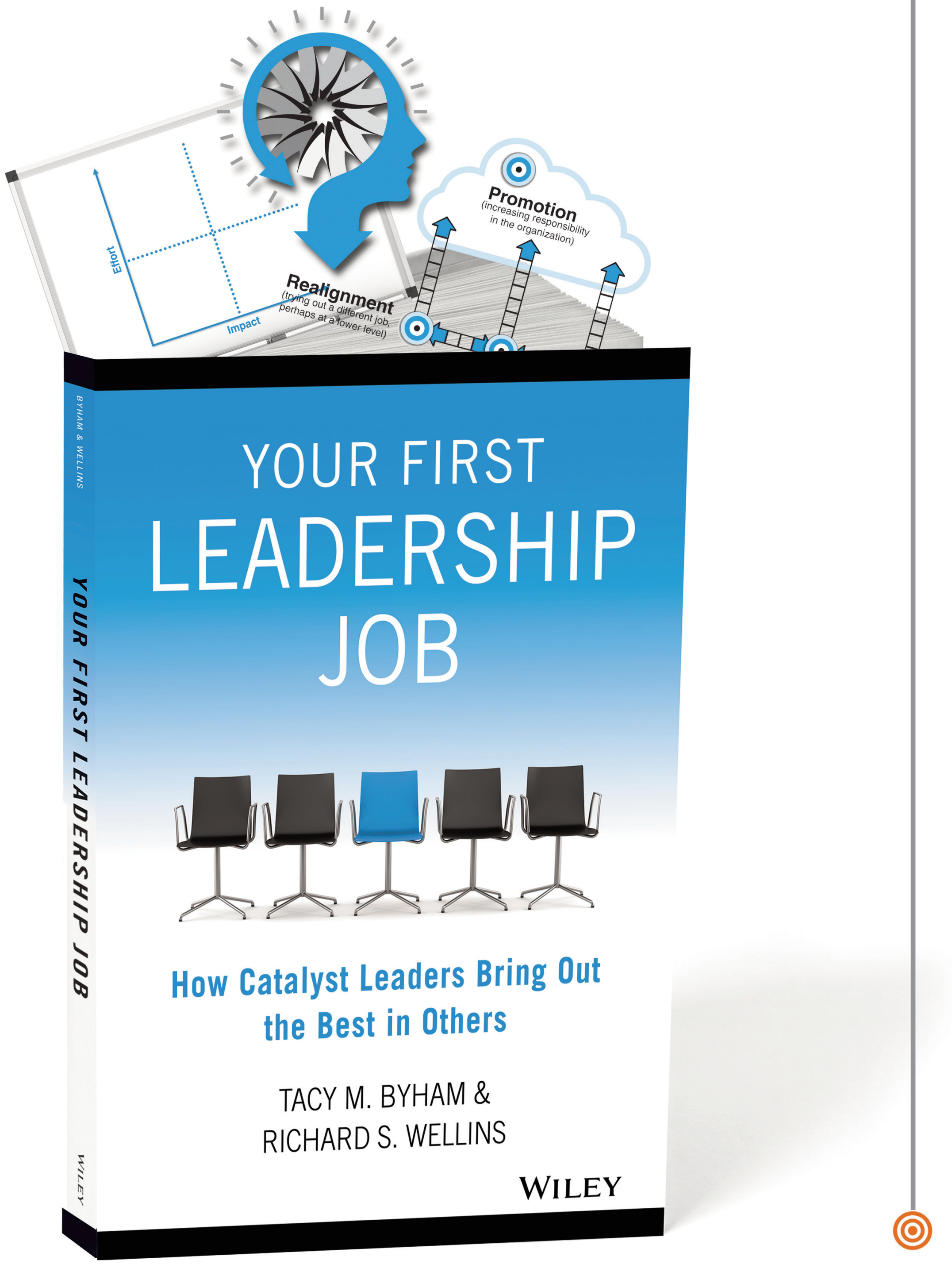
1. List your team's top three priorities on the left.
2. Then, link those priorities with the team's, department's, or organization's broader business goals by writing them in on the right.
3. Refer to the following two examples for guidance.

Important note: This is the most important exercise in this chapter. Don't skip it! This is your opportunity to document your team's top priorities, which is the critical first step in clarifying and driving focus.

My Team's Most Critical Priorities	Organization, Department, or Business Unit Goals
(Example) Integrate our technology databases (financial, client records, order-entry systems) across the enterprise.	Increase operational efficiencies in accounting systems.
(Example) Increase overall customer service rating at front desk to 95 percent Satisfied or Very Satisfied.	Improve customers' first impressions under the Customer-First service initiative.
1.	
2.	
3.	

Bonus Tool

Where Does My Time Go?



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TOOL 9.3

Where Does My Time Go?

1. On the following table check the activities (first column) on which you regularly spend at least 10 percent of your time in a typical week. If needed, add more relevant activities at the end of the list.
   Note: "Attending meetings" and "processing email" were intentionally left off this list. Account for your meeting and email times by considering what work they support.
2. For the items you checked, estimate the percentage of total time you spend (second column) during a typical week. Your percentages do not need to total 100 percent.
3. For each of your most time-consuming activities, mark the continuum (below each activity) to indicate the degree to which your work supports the priorities you noted earlier.

My Typical Week

Activity **% of Time**

❑ Providing my expert opinion to others.
[______________________________] ________
Not Priority Priority

❑ Producing work product using my technical expertise.
[______________________________] ________
Not Priority Priority

❑ Working on a team as an individual contributor.
[______________________________] ________
Not Priority Priority

❑ Solving technical problems.
[______________________________] ________
Not Priority Priority

❑ Intervening to solve customer issues.
[______________________________] ________
Not Priority Priority

❑ Developing project plans.
[______________________________] ________
Not Priority Priority

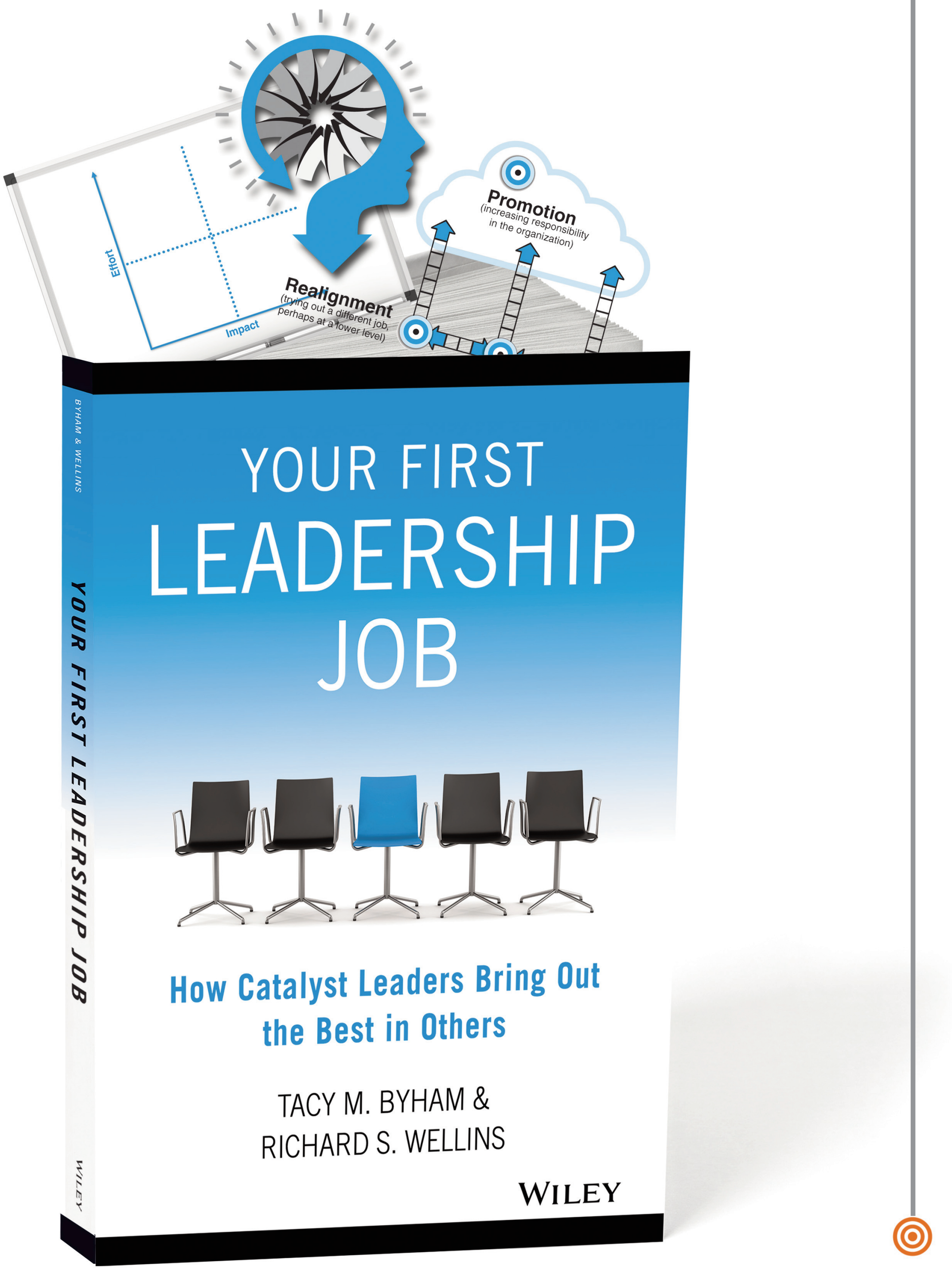
❑ Tracking projects against schedules and deadlines.
[______________________________] ________
Not Priority Priority

TOOL 9.3 *cont'd*

Activity	% of Time
❑ Monitoring my team members' performance and providing timely feedback. [______________] Not Priority … Priority	______
❑ Using appropriate quantitative measures (for example, to monitor production, quality, sales). [______________] Not Priority … Priority	______
❑ Following up on delegated work. [______________] Not Priority … Priority	______
❑ Intervening to resolve interpersonal conflicts. [______________] Not Priority … Priority	______
❑ Communicating progress to my team and key stakeholders. [______________] Not Priority … Priority	______
❑ Removing barriers to facilitate my team's progress. [______________] Not Priority … Priority	______
❑ Keeping my team informed about organizational and departmental issues. [______________] Not Priority … Priority	______
❑ Establishing decision-making and problem-solving processes. [______________] Not Priority … Priority	______
❑ Managing a budget. [______________] Not Priority … Priority	______
❑ Intervening to solve process issues. [______________] Not Priority … Priority	______
❑ ______________ [______________] Not Priority … Priority	______
❑ ______________ [______________] Not Priority … Priority	______

Bonus Tool

Strategy Execution



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TOOL 9.4

Strategy Execution Tool (Sample)

Instructions:

1. In the space below, write in the priorities you identified in Tool 9.2.
2. Note one outcome measure under each priority.
3. List the progress measures for each outcome measure.
4. Check the appropriate circle between On Track and At Risk to show that measure's status.
5. Note who is accountable for each progress measure. If that person is external to your team, circle "Ex."

Priority 1:

		On Track			At Risk		
Outcome Measures:							
Progress Measures:	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex

Priority 2:

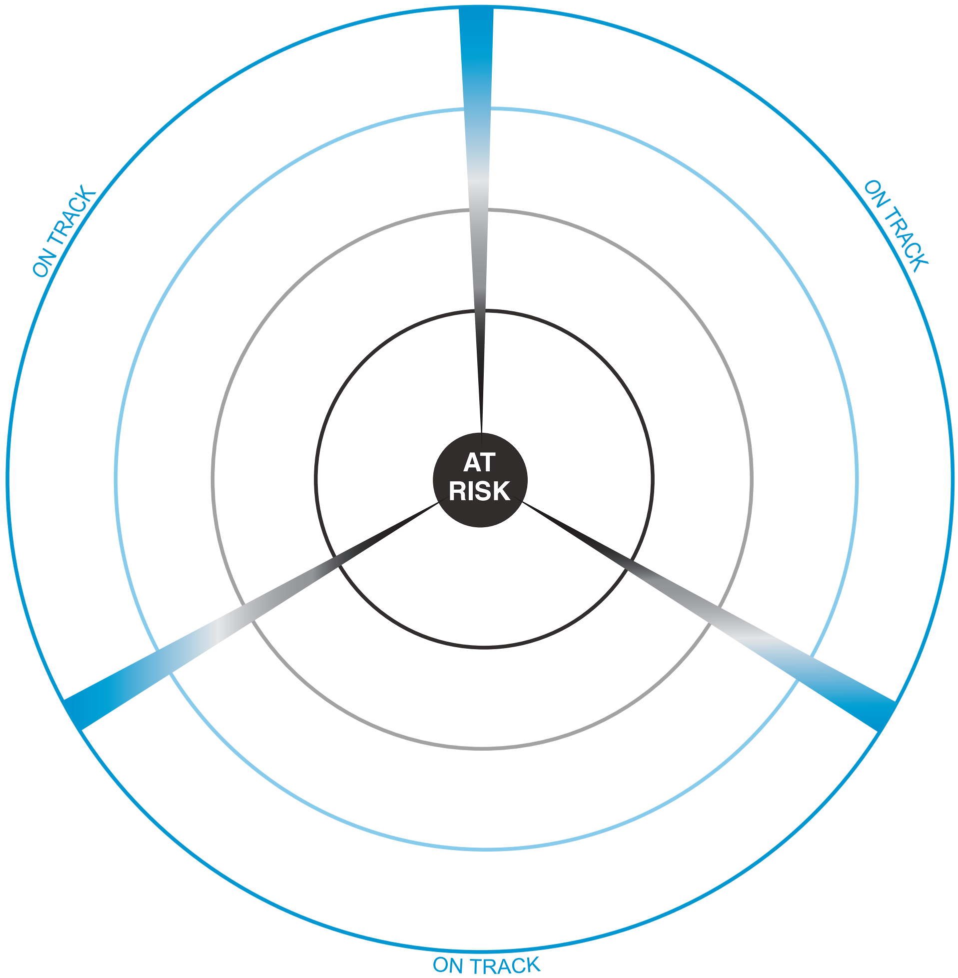
		On Track			At Risk		
Outcome Measures:							
Progress Measures:	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex

Priority 3:

		On Track			At Risk		
Outcome Measures:							
Progress Measures:	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex
	•	○	○	○	○	Who: ______	Ex

Ex = External to team

Transfer abbreviated priorities, measures, and names (with "Ex" if relevant) to the following chart to create a concise visual representation.

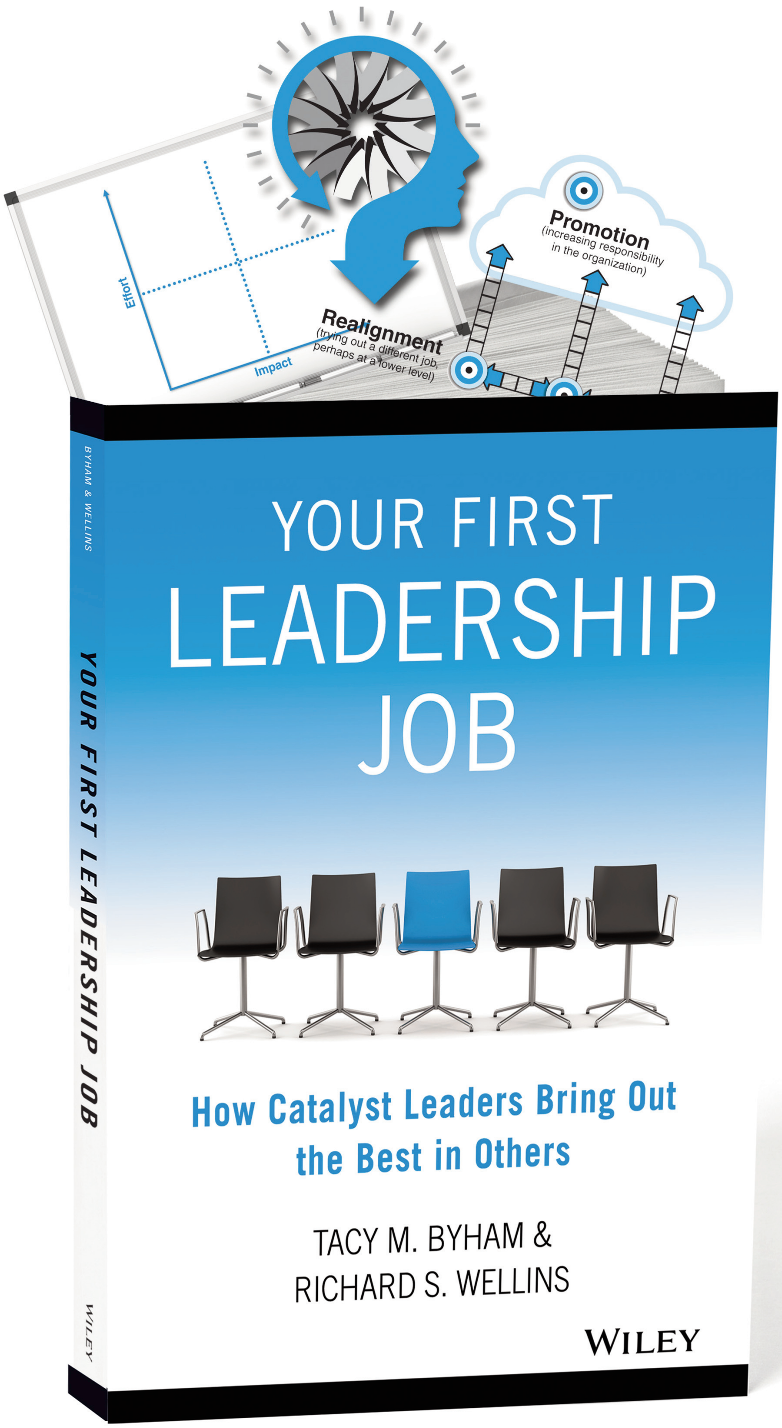


Excellent! You are now well on your way to Focus, Measurement, and Accountability. In other words, if you keep this up you'll be an Execution God/Goddess!

The next step is to keep your radar chart active; it will help you prioritize what's important versus what's not. You should even share this with your manager, who can be your biggest distractor of focus or your greatest ally. The radar chart can help you collaborate and prioritize with your manager. Here are some tips for meeting with your manager.

Bonus Tool

Managing Energy Magnets



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TOOL

MANAGING ENERGY MAGNETS

In his book *CrazyBusy*, Edward M. Hallowell said it best when he wrote:

"Paradoxically enough, it is in part the desire for control that has led people to lose it. . . . By trying to control life as much as possible, you can run yourself ragged, losing control in the process. You can feel like a tin can surrounded by a circle of a hundred powerful magnets. Pulled at once in every direction, you go nowhere but instead spin faster and faster on your axis."

In spite of our best efforts to create a perfect culture of execution, things will always pop up to pull away our focus. At work we call these energy magnets. They're particularly tough to manage when the distraction is something you really love to do—like solving problems or digging deep into details. But anything that takes you away from working on the strategy or keeping the team moving forward needs to be whipped into submission.

Below are tips to consider when you feel you are losing focus.

Tips to Stay Focused: First, put on your own oxygen mask...

- Make a "not-do" list and clear it with your manager as necessary.
- Ask yourself, "Is this the best use of my time right now?"
- When someone needs you, offer to give five minutes immediately or 30 minutes later. (Most will opt for the 30 minutes, but then forget about it.)
- Find your "best thinking time" during the day and book your strategic tasks within that time span. For example, if you're a "morning person," block time before lunch.
- Break down big tasks into subtasks that take less time. For instance, give yourself 15 minutes to accomplish a subtask of a larger project that might take a few hours to complete.
- Give yourself a reward for staying with a challenging issue.
- Go through email and answer the ones related to priorities first. Complete other, non-urgent emails at a later time.

- Limit your task switching, such as checking email or voice mail. *Fast Company* reports that once someone switches attention away from a task, it will take more than 23 minutes to get back to it.
- Realize that it's OK to say no. If saying no is not an option, then offer alternatives such as "Not right now, but I can later" or "I'm sorry I can't right now, but you can try . . ."

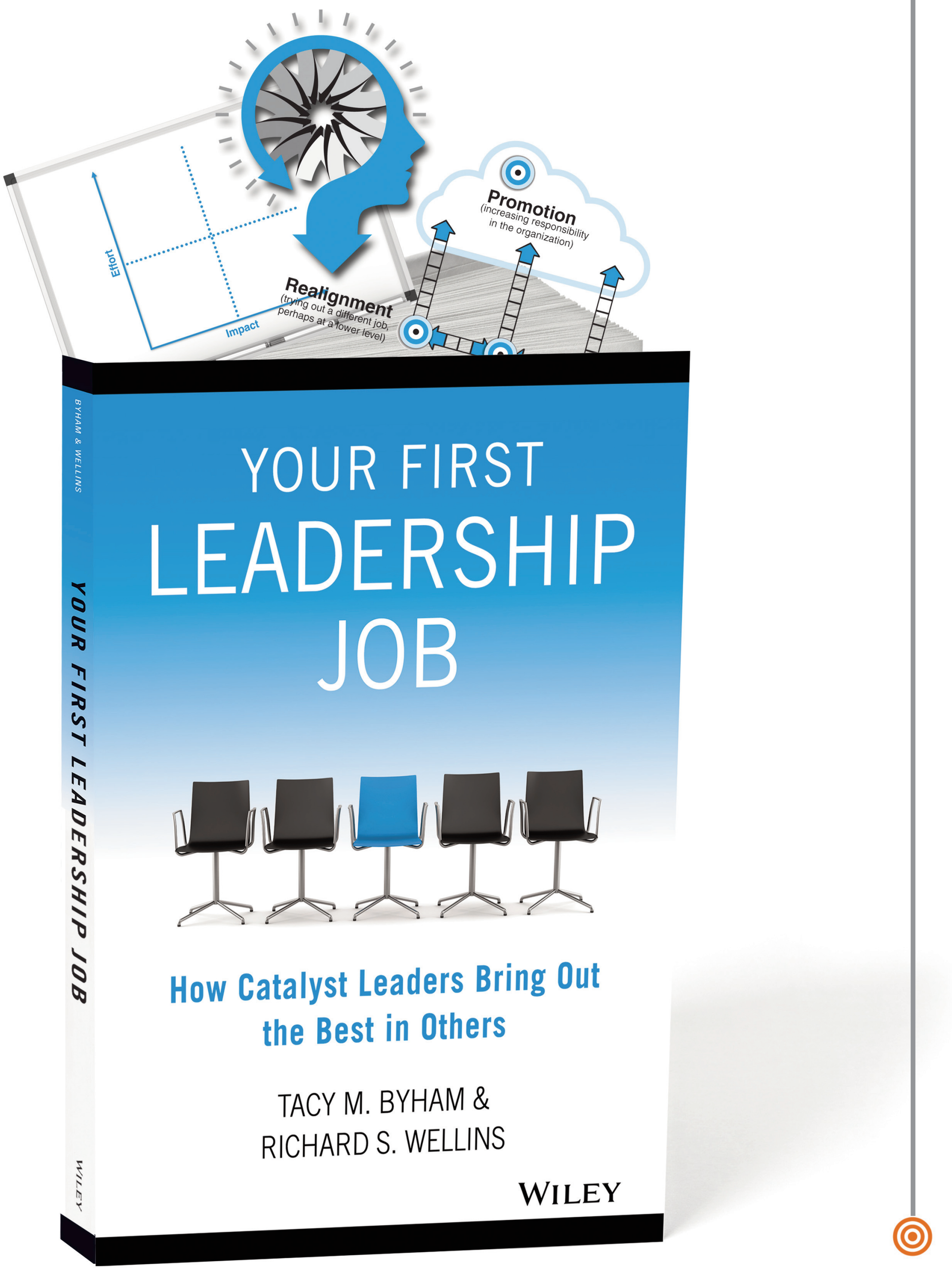
…Then assist others.

- Encourage team members to avoid making hasty commitments to others.
- If you accept tasks and assignments on behalf of team members, be sure to ask yourself the questions above before you agree to due dates or deadlines.
- Ask team members to regularly consider these questions as well.

Kermit Pattison, "Worker, Interrupted: The cost of Task Switching," Fast Company (July 28, 2008): http://www.fastcompany.com/944128/worker-interrupted-cost-task-switching

Bonus Tool

Motivation Matters



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TOOL 10.3

Motivation Matters

DDI's research has identified 30 common sources of employee satisfaction or dissatisfaction. We call these motivational facets. In the following exercise, use the scale to determine which might be most prevalent for the job you are hiring. Some facets are likely to be prevalent for a single role, while others may cross multiple roles. Your job is to then be sure you gather interview or background data from candidates to determine the fit between a candidate's motivations, and those offered in the position you are hiring for.

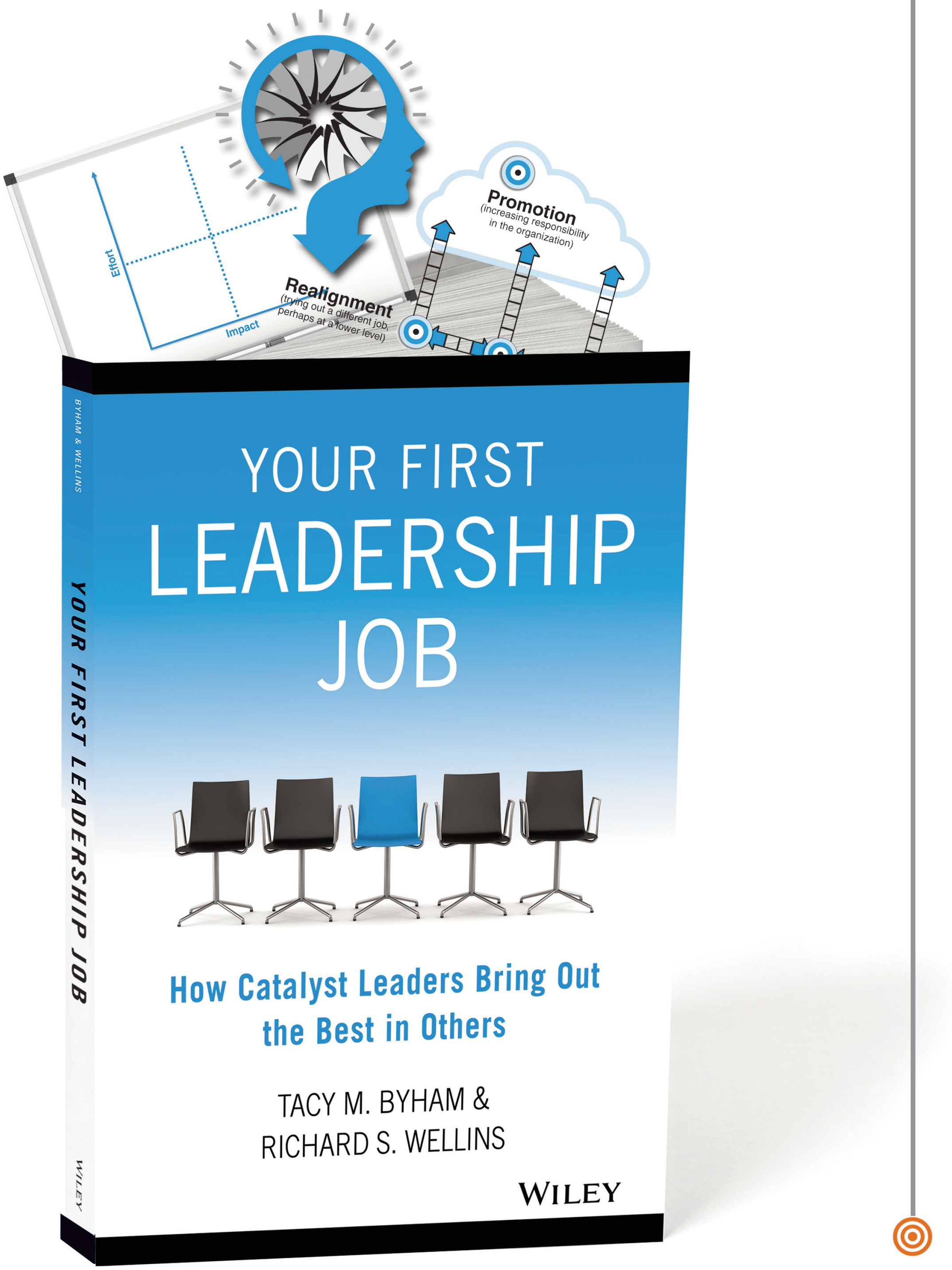
Scale:

LO Few opportunities available in job/organization.
SO Some opportunities available in job/organization.
MO Multiple opportunities available in job/organization.

Rating	Motivational Facets
	Achievement—meeting increasing work challenges.
	Compensation—receiving a high salary or generous monetary compensation for work.
	Complexity—performing complex tasks or working on complex projects.
	Continuous Learning—increasing knowledge and skill when circumstances call for additional learning.
	Detail Orientation—working on tasks requiring great attention to detail.
	Formal Recognition—receiving formal recognition (inside and outside the organization) for accomplishments.
	Bias for Action—orientation toward aggressive, proactive responses to problems and opportunities.
	Challenging the Status Quo—emphasis on asking questions and challenging the norms and standard procedures to achieve breakthrough advances.
	Social Responsibility—support of and involvement in community activities.
	Continuous Improvement—emphasis on constantly improving processes, products, and services and exploring innovative ways to do the job.
	Customer Focus—emphasis on understanding, meeting, and exceeding customer needs and maximizing customer satisfaction.
	Interdepartmental Cooperation—cultivation of an atmosphere of interdependence, collaboration, and reciprocal communication among divisions within the company.

Bonus Tool

Enhance Self-Esteem



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TOOL

ENHANCE SELF-ESTEEM

People need to feel respected and have a sense of self-worth in order to be motivated, confident, innovative, and committed to their work. When someone has done a good job, succeeded at a task, or made a contribution, you want to *enhance* that person's self-esteem. Some ways to do that are to:

- Acknowledge good thinking and ideas.
- Recognize accomplishments.
- Express and show confidence.
- Be specific and sincere.

You can use many different methods to enhance self-esteem: verbally in a meeting, through an email, person-to-person, shout-out on social media, or even a quick, hand-written note. Higher self-esteem has been associated with many performance benefits, including:

Job Satisfaction. Higher self-esteem has been associated with high levels of career and job satisfaction, particularly with working conditions and company policies and administration.

Feelings & Motivations. High self-esteem has been found to be associated with low anxiety, feelings of control, emphasis on producing quality work and having quality relationships, and actively seeking information at work.

Work Outcomes. In-depth structured interviews indicated that men with higher self-esteem experienced several positive work outcomes including:

- More innovation at work.
- More work involvement.
- Better coworker relationships.
- More support from supervisors.
- More comfort working autonomously.

Our success in exceeding our goal is because of all your efforts to pull together and stay focused on our target. Great job, everyone. Thanks!

Because you told me about the problem and worked with me to correct it, we were able to avoid confusing others. Thanks for speaking up.

You did a great job filling in for Ricardo. You got the work out on time, even with that crunch at the end of the week.

DDI Research:

Lessons for Leaders from the People Who Matter

All of us, whether leaders or employees, go to work to do a good job. In a survey of 1,300 workers around the world, nearly 40 percent of employees surveyed felt hurt and demotivated by their boss' actions, and 6 in 10 responded that their boss has damaged their self-esteem. It's little wonder that employees said they'd rather suffer a bad hangover, do housework, or receive their credit card bill than have a performance discussion with their boss!

Among those who said they worked for their "worst boss ever" at the time of the study, just 13 percent said they felt motivated to produce; conversely, 98 percent of those working for their best-ever boss felt motivated to produce. For every two to three people being managed by their best-ever manager, people felt that there would be a productivity gain equal to a whole extra person! Not to mention a decrease in costly turnover.

The top mention of what best leaders do that make them the best? *Recognize employees appropriately.*

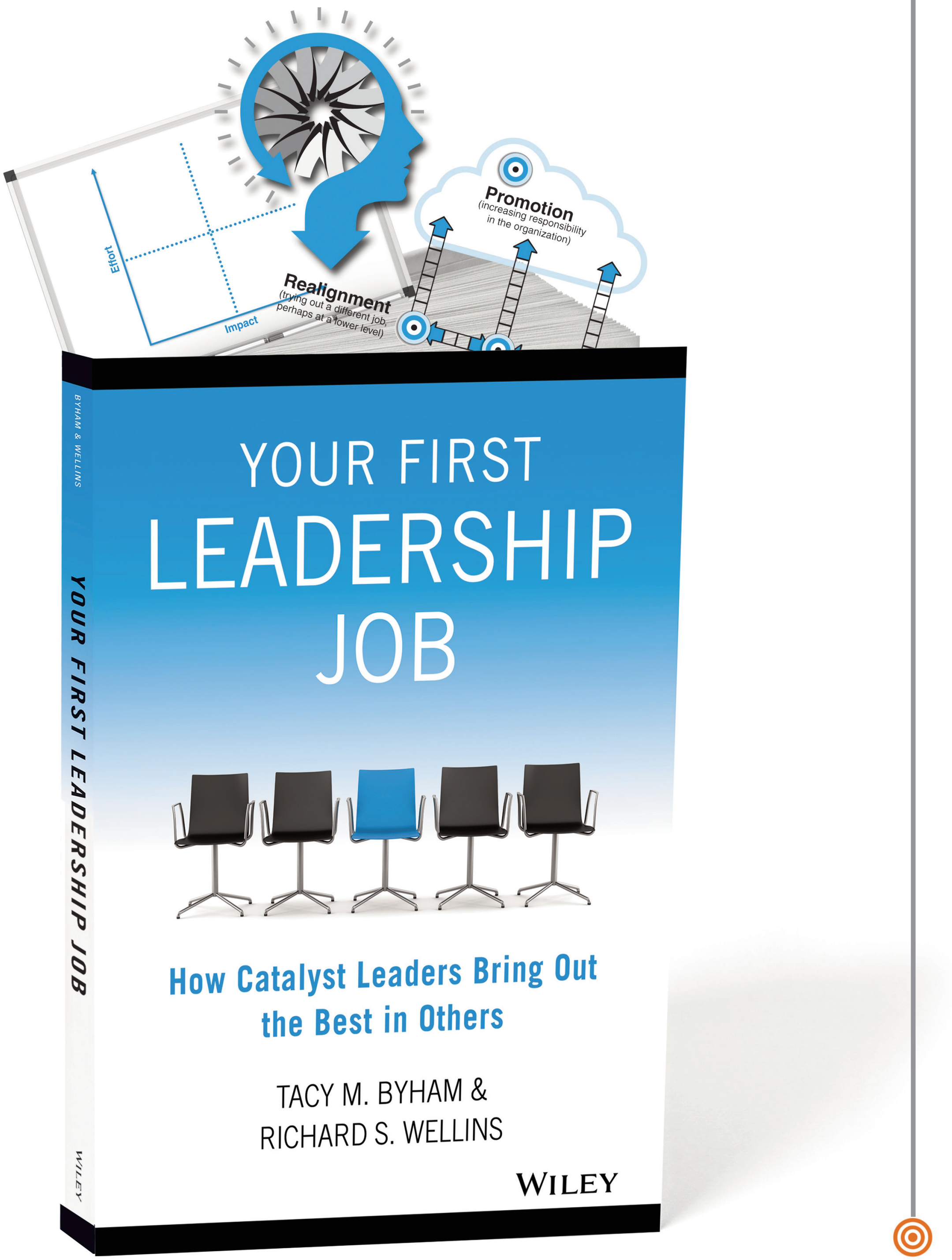
Asking several key people for their input really helped you develop a solid contingency plan. Everyone was impressed.

Taking the initiative to record the group's concerns during our meeting today helped us stay on track. I really appreciate your efforts.

We almost got off track on two unrelated problems during that meeting. When each of you suggested that the issues be covered at a separate meeting, it helped everyone refocus.

Bonus Tool

Networking Self-Assessment



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Networking Self-Assessment

Do you have characteristics that will support you as you broaden your strategic network? By responding to this self-assessment, you'll be able to see to what degree you possess the work styles and dispositions shared by successful strategic networkers.

Instructions: Please indicate how strongly you agree or disagree with each statement using the scale below. Select the number on the right corresponding to your choice for each item. After completing the survey, think about how you might leverage or expand your skills. Consider sharing your results with the best networker in your network.

1	2	3	4	5
Strongly Disagree	**Disagree**	**Neither Disagree nor Agree**	**Agree**	**Strongly Agree**

Statement					
1. In my organization, I know which people in other business units capable of helping me in my job are available within my company.	1	2	3	4	5
2. I often ask colleagues to provide feedback on my approach for dealing with work situations.	1	2	3	4	5
3. I have no hesitation about approaching members of upper management to suggest new ideas.	1	2	3	4	5
4. When working on cross-functional teams, I determine which members I should stay in contact with after the team project ends.	1	2	3	4	5
5. I send colleagues copies of articles, web addresses, or reports I think might interest them.	1	2	3	4	5
6. I frequently ask colleagues for advice regarding work-related problems.	1	2	3	4	5
7. I am comfortable taking the lead in meeting new people.	1	2	3	4	5
8. Before starting new projects, I find out what information is needed to succeed and exactly who in my organization can provide it.	1	2	3	4	5
9. I invest time and effort at work maintaining my network of colleagues.	1	2	3	4	5
10. I am very comfortable displaying a lack of knowledge by asking a colleague for help.	1	2	3	4	5
11. Compared to my coworkers, I know a large number of business contacts outside my organization.	1	2	3	4	5

1	2	3	4	5
Strongly Disagree	**Disagree**	**Neither Disagree nor Agree**	**Agree**	**Strongly Agree**

12. I write thank-you messages to work-related contacts after they have helped me.	1	2	3	4	5
13. I enjoy initiating conversations with work colleagues whom I have never met before.	1	2	3	4	5
14. When I seek help from colleagues, I am certain that they do not see it as a sign that I lack ability.	1	2	3	4	5
15. I periodically organize my contact list to focus on people who have assisted me.	1	2	3	4	5
16. As a rule, I ask work colleagues for ideas on how to address challenging situations.	1	2	3	4	5
17. I am good at taking steps to make myself known to influential people in my organization.	1	2	3	4	5
18. I have established many contacts outside my organization based on their ability to aid me later in my career.	1	2	3	4	5
19. I use social networking tools (e.g., LinkedIn, Facebook, Twitter) to correspond with work-related contacts.	1	2	3	4	5
20. I exchange contact information with many new people I meet at organizational and professional functions.	1	2	3	4	5
21. Immediately after I encounter difficult situations at work, I ask others for guidance about possible courses of action.	1	2	3	4	5
22. I often ask coworkers how satisfied they are with our working relationship.	1	2	3	4	5
23. I am good at identifying people outside my organization who have valuable information or insights.	1	2	3	4	5
24. At meetings or social events, I am not reluctant to introduce myself to someone new.	1	2	3	4	5

Step 2—Scoring the Self-Assessment

From each statement on the previous two pages, copy the number you selected into the appropriate numbered space below.

Add the numbers in each column and write the totals in the spaces provided.

Identifying Information/ Expertise and Who Can Provide It	Reaching Out	Asking for Help	Maintaining Relationships
1. ______	3. ______	2. ______	5. ______
4. ______	7. ______	6. ______	9. ______
8. ______	13. ______	10. ______	12. ______
11. ______	17. ______	14. ______	15. ______
18. ______	20. ______	16. ______	19. ______
23. ______	24. ______	21. ______	22. ______
Totals: ______	**Totals:** ______	**Totals:** ______	**Totals:** ______

Step 3—Interpreting Your Score

The four columns above include networking factors that offer practical ways to handle your network as it grows. All scores reflect your results compared to those of other people. Factors with scores of 19 and lower indicate areas where your behaviors have been less frequently displayed or where you may have had fewer opportunities to obtain relevant experience than have other people.

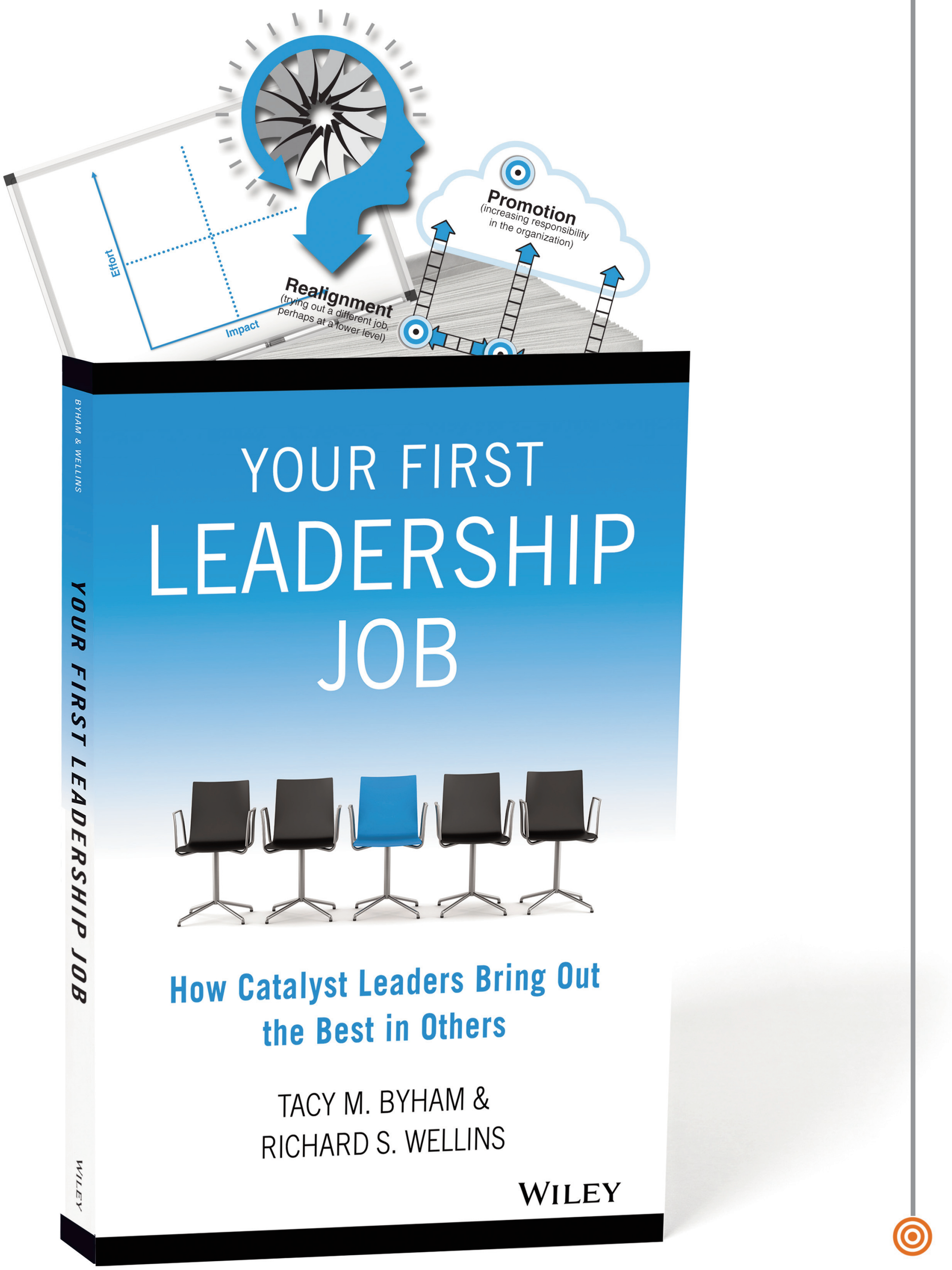
Conversely, factors with scores of 24 and higher indicate aspects of networking where you have demonstrated more consistent behaviors and have accumulated more extensive experience compared to others.

Factors with scores between 20 and 23 are those in which your behaviors, dispositions, and experiences are moderate or average compared to others.

Factor Score Range	Interpretation
19 or lower	Low compared to others; a potential growth area
20 to 23	Moderate/average compared to others
24 or higher	High compared to others; a strength to leverage

Bonus Tool

Conversation Planning: Change



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TOOL

CONVERSATION PLANNING: CHANGE

When organizational change efforts flounder or fail, employee resistance is often cited as one of the primary reasons. People just don't like change! That's a common misconception, but it's easy for leaders to blame resisters rather than to consider that they themselves might have failed to engage their team members.

When leaders assume that people naturally resist change, they overlook the possibility that team members' concerns might be legitimate (Ford, et al, 2008). As a result, leaders miss opportunities to enhance or improve the change and engage the very individuals whose support they need. This planner shares best practices around change to use with your team and provides guidance on how to approach a person or team about their resistance to change.

Best Practices

You can use the following best practices at any time during the change to help ensure a successful implementation, particularly if you have resistant team members. Which will you use?

- ❑ **Keep the benefits of change in sight**—generate a list of every benefit of the change you can think of—for individual team members, the team as a whole, and the organization. Share the list with team members and encourage them to add other benefits. Post it for everyone to see in a team area or on an intranet site.

- ❑ **Recognize that people approach change differently**—People react differently to the same change, so don't try to talk them out of their feelings. Instead, use the Empathy and Involvement Key Principles to help them adapt in their own way.

- ❑ **Lead by example**—If you're asking people to keep a positive attitude, to be open to change, to get involved, etc., then be a role model by doing so yourself. Be the first to volunteer and dig in. People will see you're willing to make the effort.

- ❑ **Maintain a sense of urgency**—help team members stay focused on the objective of the change. Encourage them to identify ways to monitor progress and measure results.

- ❑ **Build commitment to the change**—encourage team members to contribute their own ideas by:
  - ❑ Making idea generation an official objective in their performance plans.
  - ❑ Adding idea generation as a running agenda item at staff meetings to monitor progress.
  - ❑ Encouraging participation in task forces or subcommittees to help make their ideas a reality.
  - ❑ Volunteering to be the first team to put a change into practice.

- ❑ **Recognize and reinforce incremental progress**—identify people using new processes or procedures; seek out even the smallest indications that team members are acting in new ways in order to encourage them, as well as their colleagues, to continue the momentum. Remember to take time to celebrate milestones and indicators of success.
- ❑ **Continue to measure and monitor progress**—ensure the change is accomplishing its objectives by:
  - ❑ Continuing to seek feedback and concerns as well as provide coaching and support.
  - ❑ Removing any obstacles or roadblocks that might prevent people from making progress.
- ❑ **Expect that mistakes will occur**—position the mistake as an opportunity to learn. First, empathize with the person. Then use the Share Key Principle by disclosing mistakes you made in similar situations. Encourage the person to share lessons learned with fellow team members.
- ❑ **Build confidence**—use the Esteem Key Principle to build team members' confidence that they can successfully implement the change. Share examples from previously successful change initiatives.
- ❑ **Additional best practices you plan to use:**
  - ❑ ____.
  - ❑ ____.

Discussing Resistance to Change

Use the following questions, along with a Discussion Planner, to prepare for a conversation about a change. These tools will help you get a better idea of how to approach a person or team so you can help people overcome their resistance to the change.

1. **Briefly describe the change you believe a person or team is resisting.**

2. **With whom do you need to discuss this situation?**

3. **What have you seen, heard, or felt that leads you to believe a person or team is resisting this change?**

4. **Why do you think people are resisting the change?** *(Select all that apply.)*

   - ❑ Not sure they have the right skills to implement the change.
   - ❑ Concerned that their knowledge or skills are now less important.
   - ❑ Worried that the change will make it harder for them to meet other work commitments.
   - ❑ Do not understand why the change is necessary.
   - ❑ Surprised by the change; were not involved in planning or implementing it.
   - ❑ Like the way things were before the change.
   - ❑ Other:

5. **How do you feel about this change?** *(Select all that apply.)*

   - ❑ Anxious
   - ❑ Enthusiastic
   - ❑ Frustrated
   - ❑ Confident
   - ❑ Other:

6. **What are your concerns about this change?**
   - ❑ How to address the team's reactions.
   - ❑ Having the skills to implement the change.
   - ❑ The effect on other projects and priorities.
   - ❑ Other:

7. **What challenges, if any, will you face in conducting this discussion?**
   - ❑ Handling negative reactions.
   - ❑ Reordering assignments and tasks.
   - ❑ Balancing getting the change implemented with listening to and acknowledging concerns.
   - ❑ Disclosing thoughts, feelings, and rationale in a way that doesn't influence the team to react negatively.
   - ❑ Other:

Review the best practices you've selected.
How will applying these encourage people, particularly resisters, to embrace the change?

When will you use these in your conversation?
Make sure to note in your Discussion Planner!

Ford, J.D., Ford, L.W., & D'Amelio, A. (2008). Resistance to change: The rest of the story. *Academy of Management Review,* 33(2), 362–377.