The Blueprint For High-Performing Leaders

Self Study Course

McCAULEY & COMPANY

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HELPING GOOD LEADERS BECOME GREAT

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The Bonus Section - Worksheets

1W. 5 Roles People Play in Innovation

- **Creators**; Generate New Ideas
- **Advancers**; Communicate new ideas & carry them forward
- **Refiners;** Analyze Ideas for Flaws or revise projects systematically
- **Executors;** Deliver concrete results and seek successful implementations
- **Flexors;** Have an equal preference for most roles and can adapt to fit the teams needs

Right Action Model

*The right people, doing the right things, in the right way, at the right time,
for the right reasons – this is the essence of right action.*

People

- What qualities do we need in a colleague, client or recruit?
- Who is ideal that is already on my team?
- Do I have the right people with the right talent?
- Who needs a little more attention to help tip them into star performance?

Things

- What should we be putting our energy and efforts on?
- Are we focused on what matters?
- What is our plan to achieve our goals and what actions are required to accomplish them?
- How should we regularly assess and upgrade what we are spending our time on to make sure it is delivering the outcome we are looking for?

Ways

- How does my team and organization rate on doing things the right way?
- Are they acting in ways that are in alignment with mine and my company's objectives, vision and values?
- Am I/we applying processes and systems in the most efficient and smartest way possible?
- How can we work with each other to bring out each person's best?

Time

- What's the ideal way to prioritize our days/weeks/months?
- How can we plan our schedule to make sure we are doing the most difficult/important things first?
- When is the most appropriate timing to deliver difficult news?
- Where can we get better at our timing in all areas of our organization (product launches, sales presentations, client recognition, employee recognition, etc.)?

Reasons

- Why does our company exist?
- Who benefits from the good work we do?
- What makes us a great company?
- Why do people want to work here?

3W. Chris Argyris' Ladder of Inference

Created by Chris Argyris
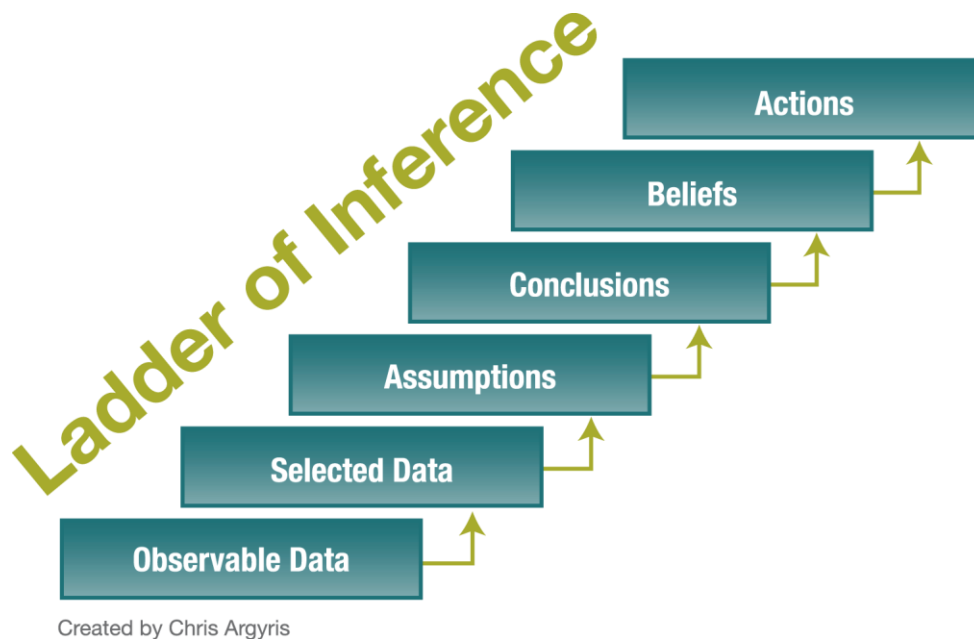
Argyris (1990) describes the progressive process of making observations, gathering information, making assumptions, and deciding action as being similar to climbing up on a **"ladder of inference."**

Through his research, Argyris has discovered that every person has tendencies to climb up the ladder of inference too fast. Almost instantaneously after seeing or hearing someone else speak or act, individuals integrate the new observation/ information with their existing set of assumptions, sometimes prompting action that has only minimal relationship to what was originally spoken or observed.

When this same ladder-climbing dynamic happens within a social or organizational setting, an environment for conflict is created that easily escalates. (Argyris, 1990)

The theories we create are used to create meanings, and meanings are imposed upon our culturally understood messages. Culturally understood messages are used to filter directly observable data, such as conversations.

As seen as a sequence of events (instead of an ascending ladder), it would go like this:

- ☐ All the INCOMING information in the world – observable data and experiences.
- ☐ I select DATA from what I observe.
- ☐ I add MEANINGS and make assumptions (cultural and personal).
- ☐ I take ACTIONS based on my beliefs.

An update from neuroscience: In the last 10-15 years, scientists have revealed more about what goes on in the brain during judgment and decision-making. This doesn't change the Ladder of Inference; it's still a good model for what goes on in the minds of people.

However, it's worth noting that these steps happen in milliseconds. In fact, it all happens so quickly we're not even aware of these steps, most of which occur on a subconscious level. Many of our assumptions and conclusions take place in the subconscious parts of the brain before we become cognitively aware.

When there is sensory input through one of our five sensory organs, information is received and processed subconsciously first, using the parts of the brain that filter for danger and pleasure. We may experience a physiological reaction because of this.
The observations are felt first and we become conscious of them after the fact. The cognitive regions of the brain go to work to explain our reactions, but also to moderate them to fit our beliefs and cultural norms.

We may have an immediate reaction that is based on a primitive "fight or flight" survival instinct. This happens more frequently than we'd like to admit.

The point is that our initial reactions can be subconscious, over-reactive AND informative at the same time. We can miss the boat if we do not pay enough attention to gut reactions, or if we lend too much importance to them. Awareness is key.

C.O.R.E. Performance Coaching Model

- Initiate Discovery
- Explore Assumptions & Possibilities
- Develop Plans & Action Steps
- Preview Best & Worst Case Scenarios
- Take Right Action

5W. C.O.R.E Performance Coaching - SUGGESTED QUESTIONS

Initiate Discovery:
- What would you like to focus on during this meeting?
- What is the best use of time during this meeting?
- What's the biggest challenge facing you now?
- What's most pressing?

Explore Assumptions & Possibilities:
- What's important about this?
- What matters?
- What have you thought of so far?
- What are your options?
- What would be a win from your angle? From another angle?
- What could be another perspective?
- What do you need most right now?

Develop Plans & Action Steps:
- How would you make that happen?
- What are next steps?
- Who might push back and how would you redesign?
- What does this plan accomplish? Why does it matter?
- Who should be involved?
- How will people be held accountable? When are the deadlines?
- How will you measure success? How will others measure success?
- What could stop you?

Preview Best- & Worst-Case Scenarios:
- What is your ideal outcome?
- If you were wildly successful, what would that look like?
- What needs to happen at this meeting (or this project) for this to be a home run?
- What could go wrong?
- What haven't you thought of that could be a disaster?
- How will you gracefully manage or exit the situation?

Take Right Action:
- What are you going to do once you leave this meeting?
- What are your next steps? With who? By when?
- What's most important to do now?

This model in its entirety is the most efficient and effective way to evoke self-correcting/self-generating behavior from the people you work with, so you can focus on being a leader!

Questions for Self-Coaching Using the C.O.R.E. Performance Coaching Model

- What's distracting you?
- What are some ways you manage, remove or contain this distraction?
- What are your assumptions about it?
- What are some alternative possibilities for handling it?
- What have you tried so far?
- What action steps might help?
- Mentally walk yourself through a best-case scenario.
- Now take the opposite stance and walk yourself mentally through a worst- case scenario.
- How will you exit the situation gracefully if it should fail, so you can resiliently carry on?
- Take a look at elements of right action; are you in alignment?
- What action will you start to take? Then what?
- How will you measure results, what evidence will indicate success?

6W. Coaching for Progress

When you focus on small wins and facilitate progress, your team will find the energy and drive required to perform optimally. People will be more cohesive and collaborative. You'll get high performance.

In the work I do coaching people who are responsible for teams, I find that some naturally know how to spark best performance, and some don't.

According to the research done by Amabile and Kramer for the book *The Progress Principle* (Harvard Business School Press, 2011), two things encourage progress, *catalysts* and *nourishers*.

1. **Catalysts** - Events that directly advance project work, such as:
   a. Clear goals
   b. Autonomy
   c. Resources, including time
   d. Reviewing lessons from errors and success
   e. Free flow of ideas
2. **Nourishers** - Interpersonal events that uplift workers, including:
   a. Encouragement and support
   b. Demonstrations of respect
   c. Collegiality

Dealing with Setbacks

No work is without setbacks and negative events. The secret to making progress is how you deal with them. Three events undermine people's inner work lives:

1. **Setbacks -** The biggest downer, yet inevitable in any sort of meaningful work
2. **Inhibitors -** Events that directly hinder project work
3. **Toxins -** Interpersonal events that undermine the people doing the work

Negative events carry a greater impact than positive ones. We pay more attention to them, remember them, and spend more time thinking and talking about them.

That's why it's so important for managers and team leaders to counteract negative events with positive perceptions and comments. Research shows it takes three positive messages to balance a negative one. How does your ratio of positive to negative messages stack up?

7W. Coach Meeting Prep Form

Name_____Date_____

CLIENT INSTRUCTIONS: Please respond to each question below to prepare for our meeting.

WHAT HAVE I ACCOMPLISHED SINCE OUR LAST MEETING:

WHAT I DIDN'T GET DONE BUT INTENDED TO:

WHAT I WANT TO FOCUS ON DURING THIS MEETING:

MY TOP 3-5 GOALS FOR THE NEXT 90 DAYS:

THE OPPORTUNITIES AVAILABLE TO ME RIGHT NOW:

MY TOP 3-5 THINGS TO DO IN THE NEXT 7-14 DAYS TO ACHIEVE MY 90-DAY GOALS:

WHAT I PROMISE TO DO BY OUR NEXT MEETING:

8W. The Daily Progress Checklist

To better coach your people, use a Daily Progress Checklist to review today's, and plan tomorrow's, actions. After a few days of checklist use, you'll be able to save time by scanning for the *italicized words*:

1. Focus first on the day's *progress* and *setbacks.*
2. Next, think about specific events: the *catalysts* and *nourishers* that affected progress.
3. Finally, prepare for *action:* What's the one step you can take to best facilitate progress?

For the research conducted for the book *The Progress Principle,* authors Teresa Amabile and Steven Kramer used daily diaries to collect the thoughts about work from teams of knowledge workers in several diverse companies.

What they found makes so much sense, yet it's not being applied by most managers. They showed that above all else, people were motivated when they got *support for progress*.

That's not the same as recognition for good work accomplished. People want to engage in meaningful work, and even small wins, for themselves or their team- mates, boosts their energy and motivation to carry on.

The next page has some questions that can walk you through using small wins and progress to motivate your team.

Progress	Setbacks
Which 1 or 2 events today indicated either a small win or a possible breakthrough? (Describe briefly.)	Which 1 or 2 events today indicated either a small setback or a possible crisis? (Describe briefly.)
Catalysts	**Inhibitors**
Did the team have clear short- and long-term *goals* for meaningful work?	Was there any confusion regarding long- or short-term *goals* for meaningful work?
Did team members have sufficient *autonomy* to solve problems and take ownership of the project?	Were team members overly *constrained* in their ability to solve problems and feel ownership of the project?
Did they have all the *resources* they needed to move forward efficiently?	Did they lack any of the *resources* they needed to move forward effectively?
Did they have sufficient *time* to focus on meaningful work?	Did they lack sufficient *time* to focus on meaningful work?
Did I give or get them *help* when they needed or requested it? Did I encourage team members to help one another?	Did I or others fail to provide needed or requested *help*?
Did I discuss *lessons* from today's successes and problems with my team?	Did I "punish" failure, or neglect to find *lessons* and/or opportunities in problems and successes?
Did I help *ideas flow* freely within the group?	Did I, or others, *cut off* the presentation or debate of ideas prematurely?

Nourishers	Toxins
Did I show *respect* to team members by recognizing their contributions to progress, attending to their ideas and treating them as trusted professionals?	Did I *disrespect* any team members by failing to recognize their contributions to progress, not attending to their ideas or not treating them as trusted professionals?
Did I *encourage* team members who faced difficult challenges?	Did I *discourage* a member of the team in any way?
Did I *support* team members who had a personal or professional problem?	Did I *neglect* a team member who had a personal or professional problem?
Is there a sense of personal and professional *affiliation* and camaraderie within the team?	Is there tension or *antagonism* among members of the team or between team members and me?

Source: T. Amabile & S. Kramer, *The Progress Principle: Using Small Wins to Ignite Joy, Engagement, and Creativity at Work* (Harvard Business School Press, 2011

9W. Identifying Competing Commitments

Identifying Competing Commitments

What would you like to see changed at work, so that you could be more effective or so that work would be more satisfying? What's one big thing you'd like to change?

Source: _Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization_ by Robert Kegan **and** Lisa Laskow Lahey, Harvard Business School Press, 2009.

Examples: Changing health habits and recruiting new sales people

My Goal _I am committed to the value or the importance of…_	How I Sabotage _What am I doing or not doing, that prevents my achieving this goal?_	Competing Commitments _I may also be committed to…_	Assumptions that may not be true… _I assume that if…_
1. Be fit	I don't work out regularly, I don't schedule time to work out, I just fit it in.	My other priorities are more important to me so I don't have time. I want to have fun and working out isn't fun!	I can't have fun and get fit. Carving out workout time will rob me of time doing the things I really care about. It's one more thing on my too long to-do list.
2. Recruit 5 quality salespeople	I wait to recruit until the end of the year; I don't put recruiting activities in my calendar as a regular "must do."	I have my current sales people that need my time and attention. I have to personally sell in order to increase my income.	I can't do all of the things that are required of me and not suffer a financial loss, plus it would reduce my effectiveness in the areas in which I excel.

Identifying Competing Commitments

Visible Commitment: Improvement goals - *What's the One Big Things that if you could change it, would make your work more satisfying?*	Doing / not doing instead *What are my behaviors that work against the attainment of this goal?*	Hidden competing commitments *If you imagine doing the opposite of the undermining behavior, do you detect in yourself any discomfort, worry or vague fear? What worrisome outcome are you committed to preventing?*	Big Assumptions *What big assumptions do you have that contribute to a need to self-protect? (What fear or worry leads you to Column 2 behaviors?)*
I am committed to the value or the importance of….	*What am I doing or not doing that prevents my commitment for being fully realized?*	*I may also be committed to….*	*I assume that if…..*
		Worry Box: I worry that….	

10W. Best Boss/Worst Boss Worksheet

Best Boss

Notes…

Worst Boss

Notes…

11W. Questions for Creating Clarity

The key to clarity is to get as specific as possible. Keep asking questions until there are no more layers to uncover:

- What is important?
- What is one thing you could shift that would change "everything?"
- What really matters?
- What's required for success?
- What do you want to accomplish?
- What needs to happen over the next 3-6 months in order for you to consider this a success?
- How will you know you are successful?
- How will you know your team is on the right track?
- What evidence will show you are successful?

Be sure you uncover what is really important or you run the risk of working on something that doesn't matter.

12W. SWOT Analysis Worksheet

Current Strengths	Current Weaknesses
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
11.	11.
12.	12.

Current and Future Opportunities	Current and Future Threats
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
11.	11.
12.	12.

13W. Growth Targets

Growth Targets – by Jason Stevens, Ican Development Ltd

G = Goal – What needs to be achieved, be very specific and detailed. Write the Goal as a positive statement of intent

R = Results – What will the results look like, be like and feel like when they have been achieved. How will the results be evaluated and measured?

O = Ownership – Who owns the goal? Who else is involved, identify stakeholders and other interested people?

W = Will – What is their level of Will & Skill to succeed and achieve this target? What is their motivation and engagement to make this happen? What knowledge and skills need to be delivered or developed?

T = Timed – How long will it take? What are the short, medium and long term timescales and milestones? When and how will progress be measured?

H = How – How will they do this? How will plan B's be developed? How will challenges and problems be overcome? What support do they need in the initial stages?

GROWTH Targets are Copyright of Ican Development Ltd – this model can be used in conjunction with a clear reference to "Jason Stevens – Ican Development Ltd – www.icangrowpeople.com"