Leadership
Basics

The basic information you need to know about Leadership & Management concepts!

Foreword

This study guide is a collection of leadership concepts in one simple, concise and easy to read document. It is intended to provide a quick overview of concepts with pointers to additional information for more in-depth review. The document also serves as ready reference and study guide; it can be used as a tool to commit concepts to memory by looking a term on the left and trying to recall details from the right.

The content of this study guide is consolidated from publicly available information from multiple sources. Although significant effort has been made to remain true to the source content while summarizing, some information may be modified, merged across multiple sources, or edited for style or fit into the document format.

When a term is initially defined in this reference, it is identified in **bold font**. Many terms have hyperlinks to additional information that is available on the Internet (identified by blue font). Other font colors (e.g., purple, deep blue, etc.) and formats (e.g., ***bold italics***, underlines, etc.) are used simply to distinguish text for clarity.

This document may be periodically reviewed and updated. Provide comments or corrections at:

BasicStudyGuides.com

UNDERSTANDING THE CONCEPTS IN THIS STUDY GUIDE WILL HELP YOU BECOME A BETTER LEADER!

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OVERVIEW

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<tr><td colspan="2" align="center">Leadership vs. Management</td></tr>
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<td>Leadership</td>
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- **Leadership** – The _stylistic_ approach to guiding people in the pursuit of a goal (i.e., the 'how').
- Good leadership:
  - Inspires others to achieve more than they think they could.
  - Encompasses skills that often occur intuitively, but can also be learned and developed over time.
  - Can be described in many ways, with more than one correct approach for any situation.

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<td>Management</td>
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- **Management** – The _substantive_ process of organizing & controlling people or things (i.e., the 'what').
- Good management:
  - Ensures optimal efficiency by establishing structure, defining process and coordinating activities.
  - Organizes work, sets goals, coordinates execution, and evaluates performance.
  - Relates closely to good leadership, but is less inspirational and more methodical.

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Leadership vs. Management

Arruda (2016)

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- **Leadership vs. Management** – "Leadership is the art of accomplishing more than the science of management says is possible." – Colin Powel
- Leadership and management are intertwined and closely aligned – both are needed.
  - The following differences serve as a start for further discussion.

Leaders	Managers
o Leaders create a vision	o Managers create goals
o Leaders are change agents	o Managers maintain the status quo
o Leaders are unique	o Managers copy _(but copying cab be good!)_
o Leaders take risks	o Managers control risks
o Leaders are in it for the long haul	o Managers also think about the short-term
o Leaders grow personally	o Managers rely on existing, proven skills
o Leaders build relationships	o Managers build systems and processes
o Leaders coach	o Managers direct
o Leaders create fans	o Managers have followers

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Ten Successful Leadership & Management Practices

Fischer (2022)
Various Sources

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- **Ten Successful Leadership Practices**   (Note: Evaluate yourself on each item every quarter!)
  1. Lead by example
     - Don't ask others to do what you wouldn't do; model the behaviors you expect in others
  2. Be optimistic - Optimism magnifies leadership
     - Maintain a positive outlook. ("Whether you think you can or can't, you'll always be right")
  3. Go and see what is going on for yourself
     - Don't rely solely on information from reports or other people (also see #4)
  4. Ask questions
     - Ask to learn from others or to help them figure out the answers themselves (i.e., socratically)
  5. Make complex things simple
     - Great leaders are great simplifiers
  6. Communicate regularly
     - Supervisors should strive to check-in (or chat) with every follower, every day (also see 4 & 5)
  7. Share information whenever possible
     - Information is power; it can help others, but safeguard info that can be used it for evil
  8. Maintain an appropriate leadership presence
     - Look and act like a person who should be in charge at all times (even when informal/casual)
  9. Praise in public and criticize in private
     - Emphasize the positive with your team every week (especially on Friday/prior to time off)
     - Don't surprise someone with negative feedback or criticism in a performance review
  10. Build long term relationships
     - Develop a network of colleagues – they can often help you as a resource

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Leadership & Management Concepts

Note: Each concept is addressed later in this document.

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- **Leadership Concepts:**
  - Trait Leadership
  - Behavioral Leadership
  - Contingency Leadership
  - Functional Leadership
  - Servant Leadership
  - Transactional Leadership
  - Transformational Leadership
  - Authentic Leadership

- **Management Concepts:**
  - People Management
  - Team Management
  - Organizational Strategy & Goal Setting
  - Negotiations
  - Quality Management
  - Performance Management
  - Conflict Management
  - Administration

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Leadership Basics

LEADERSHIP CONCEPTS

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<td>Basic Leadership Styles

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Basic Leadership Styles are easy to comprehend and serve as a starting point to think about and discuss leadership ("Can a good leader simply order a follower to do something? Why or why not?")

Directive Leadership Style – The leader comes up with ideas and tells the follower what to do.

Often used for quick decisions, also on either very simple tasks or very contentious issues.

Democratic Leadership Style – The followers come up with ideas and decide what to do.

Often used to build engagement and buy-in.

BASIC LEADERSHIP STYLES

Leader / Follower — *Who decides on the idea?*

| (Democratic) Directive | Directive |
| Democratic | (Directive) Democratic |

Follower / Leader — *Who comes up with the idea?*

These basic leadership styles can be further analyzed by considering ideas and decisions.

Directive – The leader tells the follower what to do. Often used if time is short or task is simple.
(Democratic) Directive – Followers can suggest an approach, but the leader decides what to do.
(Directive) Democratic – The leader suggests an approach, but the followers decide what to do.
Democratic – The leader facilities the followers in developing options, and the team decides what to do. This approach builds buy-in.

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Trait Leadership

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<td>Trait Leadership</td>
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Trait Leadership – Focuses on a leader's personality traits. Personality traits are considered more innate in a person, and are difficult to learn or modify.

<u>Pros</u> – Trait leadership serves as a starting point for the understanding what makes a great leader.
<u>Cons</u> – Researchers have had difficulty agreeing on the traits, or combination of traits, that predict leadership success. Trait leadership may also be seen as a tool to select vs. develop leaders.

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<td>Charisma</td>
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Charisma – An extraordinary leadership trait that attracts followers and inspires devotion.

Charisma has an elusive quality (an "X-factor") that makes it hard to quantify and replicate.
The enigmatic character of charisma suggests a connection to early definition as a spiritual gift.

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<td>Leadership Presence</td>
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Leadership Presence – A key leadership behavior that describes how a leader acts in front of a group.

Leadership presence is a behavior that commands attention, wins trust and enables success.
Leadership presence is similar to charisma, but presence is both a trait and a behavior.

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<td>Great Man Theory

Carlyle (1840)
Galton (1869)</td>
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Great Man Theory – A leadership theory focusing on historical figures considered great leaders.

Early analysis by Thomas Carlyle explained history through the impact of great men.

Carlyle helped establish the concept that great leaders are born, not made.

The theory was supported by Francis Galton, who applied statistical methods to study of human differences and concluded that some human subgroups were superior to others (i.e., eugenics).

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<td>Trait Leadership Theory

Stogdill (1948)
Goldberg (1992)</td>
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Trait Leadership Theory – Built on the Great Man Theory and analyzed traits demonstrated by leaders.

Some personality traits appear to be predictive of leader effectiveness.

Roger Stogdill was a pioneer in studying and analyzing leadership traits.

He analyzed over 100 leadership-related studies, across 27 groups of factors.
Although he identified key leadership traits, the list was long and less useful as a guide.
He also concluded that successful leadership depended on both the situation and the followers.

Later research by Lewis Goldberg identified the Big Five Personality Traits, which are widely considered to be a basic structure behind all traits.

The theory identified five factors, and each factor may be further divided into two distinct values:

Openness – inventive/curious vs. consistent/cautious.
Conscientiousness – efficient/organized vs. extravagant/careless.
Extraversion – outgoing/energetic vs. solitary/reserved.
Agreeableness – friendly/compassionate vs. critical/judgmental.
Neuroticism – sensitive/nervous vs. resilient/confident.

Multiple follow-on studies have demonstrated that all of the "Big Five" traits are either positively or negatively correlated with leader effectiveness (neuroticism is negatively correlated).
Use the acronym OCEAN to remember the five traits.
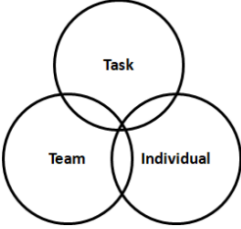

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Leadership Basics

Behavioral Leadership	
Behavioral Leadership	• **Behavioral Leadership** – Focuses on the leader's behaviors, or the way in which they act toward others. Behaviors can be learned and improved in order to become a more effective leader. 　○ _Pros_ – Behavioral theories can be learned over time and have quantifiable outputs. 　○ _Cons_ – Behavioral theories focus on consistent behavioral styles with less emphasis on adjusting behaviors according to the situation.
Behaviors vs. Traits	• Behaviors are what a person does, whereas traits describe how a person instinctually prefers to do it. 　○ 'Dependability' is a _trait_, whereas 'A dependable person arriving late' describes a _behavior_. 　○ 'Extroversion' is a _trait_, whereas 'An extrovert remaining quiet in a group' describes a _behavior_.
Basic Leadership Styles Lewin (1939)	• **Basic Leadership Styles** were analyzed in experiments that assessed their effect on small groups of 10-year-old school boys working on a task. The experiments assessed the following styles. 　○ **Authoritarian (Directive) Style –** A style where the leader organized and directed the work. 　○ **Democratic Style –** A style where the followers had input and made decisions about the work. 　○ **Laissez-Faire Style –** A hands-off leadership style where the followers acted largely on their own. • This work was foundational in assessing the impact of different leadership behaviors on followers. 　○ Different leadership styles impacted the aggressive behavior demonstrated by the followers.
Task vs. Relationship Oriented Leadership Tannenbaum & Schmidt (1958/1973)	• **Task vs. Relationship Oriented Leadership** is a descriptive model which maintains that most leadership behaviors can be classified as focusing on either work tasks or relationships. 　○ **Task-Oriented Leaders** – Focus on getting the necessary task completed to achieve a goal. 　○ **Relationship-Oriented Leaders** – Focus on supporting, motivating and developing people.
Managerial Grid Model Blake & Mouton (1964/1999)	• **Managerial Grid Model / Leadership Grid** – Highlights five primary behavioral styles that vary by a manager's concern for people or production. 　○ The leadership styles are assessed on two scales from 1 to 9, which creates 81 possibilities. 　○ Two additional variable leadership styles were added in 1999. 　▪ **Impoverished Style** (1, 1) – Leaders that focus on themselves. Little concern for people or production. 　▪ **Country Club Style** (1, 9) – Leaders that focus on employee needs. People will get results if motivated. 　▪ **Produce or Perish Style** (9, 1) – Leaders that focus on production. People are expendable. 　▪ **Team Style** (9, 9) – Leaders that motivate others and achieve results. Get satisfaction & productivity. 　▪ **Opportunistic Style** (Any) – Leaders that exploit others by using any style (the ends justify the means). 　▪ **Paternalistic Style** (1, 9 to 9, 1) – Leaders that alternate between (1, 9) and (9, 1) and focus on praise and support, but discourage challenges to their thinking.
Three Levels of Leadership Model Scouller (2011)	• **Three Levels of Leadership Model** – A model that categorizes the behaviors needed to both lead and develop as a leader. 　○ **Public Leadership** – Influencing two or more people. Consists of 34 distinct behaviors. 　○ **Private Leadership** – Influencing individuals one-on-one. Consists of 14 behaviors. 　○ **Personal Leadership** – Self-awareness, self-mastery, technical competence, and connection with followers. • **Leadership Presence** – The best leaders usually have something beyond their behavior that commands attention, wins people's trust and enables them to lead successfully, which is often called "leadership presence".

Leadership Basics

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<tr><td colspan="2" align="center">**Contingency Leadership**</td></tr>
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- **Contingency Leadership** – Defines how behaviors can be adjusted based on the situation.
  - *Pros* – Contingency leadership adjusts the leadership style to the context, albeit in a general way.
  - *Cons* – May be too subjective to validate or apply. Assumes a leader can change behaviors at will.

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Contingency Model

Fielder (1967)

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- **Contingency Model** – Builds on the concept of Task and Relationship oriented leadership (see above), but highlights that one style may not be best for all situations
  - *Task-Oriented Leadership Style* – Focuses on completing the task to achieve a goal.
  - *Relationship-Oriented Style* – Focuses on supporting, motivating and developing people

Leader-Member Relations	Task Structure	Leader Position Power	Most Effective Style
Good	Structured	Strong	Task-Oriented
Good	Structured	Weak	Task-Oriented
Good	Unstructured	Strong	Task-Oriented
Good	Unstructured	Weak	Relationship-Oriented
Poor	Structured	Strong	Relationship-Oriented
Poor	Structured	Weak	Relationship-Oriented
Poor	Unstructured	Strong	Relationship-Oriented
Poor	Unstructured	Weak	Task-Oriented

- The model suggests the most appropriate leadership style depends on:
  - *Leader-Member Relations* – The degree of trust, respect and confidence present.
  - *Task Structure* – The extent to which group tasks are clear and structured.
  - *Leader Position Power* – The power inherent in the leader's position itself.

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Situational Leadership

Hersey & Blanchard (1969)

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- **Situational Leadership** – A framework for tailoring leadership behaviors based on the situation.
  - Leaders adjust their *Style of Leadership* based on the *Development Level of Follower.*

- *S = Style of Leadership*: Modify the leadership style between directive & supportive
  - *S1*: Directing (leader directs & decides)
  - *S2*: Coaching (let's talk, and leader decides)
  - *S3*: Supporting (let's talk, follower decides)
  - *S4*: Delegating (follower directs & decides)

- *D = Development Level of Follower*: Modify the leadership style based on follower readiness for independent work
  - *D1*: Low competence, low readiness / commitment
  - *D2*: Some competence, variable readiness / commitment
  - *D3*: Good competence, variable readiness / commitment
  - *D4*: High competence, high readiness / commitment

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Path – Goal Theory

House (1971/1997)

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- **Path–Goal Theory** – Asserts that effective leaders clarify a path to help their followers achieve goals.
  - Performance and satisfaction are improved when a leader compensates for shortcomings.
  - Reminds leaders that their central purpose is to help followers define and reach goals.

- The path-goal theory identifies four leadership behaviors:
  1. *Directive*: Tells followers what is expected of them and how to perform their tasks.
     - This behavior works when the role and task are ambiguous and intrinsically satisfying.
  2. *Achievement-Oriented*: Sets challenging goals, expects performance, and supports followers.
     - This behavior is works with technicians, sales and entrepreneurs.
  3. *Participative*: Leaders consult ask for follower's suggestions before making a decision.
     - This behavior works when followers are highly involved in their work.
  4. *Supportive*: Is directed towards the satisfaction of followers.
     - This behavior is critical when tasks or relationships are mental or physically distressing.

- The theory also identifies two variables that moderate the leader behavior-outcome.
  - *Environmental Factors* – Situational factors.
  - *Follower Characteristics* – Follower experience and other factors.

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Leadership Basics

Functional Leadership	

Functional Leadership	• **Functional leadership** – Focuses on the roles that a leader has in the organization rather than the specific leadership behaviors that contribute to organizational or unit effectiveness.
	    o _Pros_ – Functional leadership goes beyond behaviors and gets into the meat of what a leader does.
	    o _Cons_ – Assumes that the leader will be able to effectively fill the roles once they are understood.

Action Centered Leadership
 	
Adair (1973)
	• **Action-Centered Leadership Model** – Highlights the core areas of a leader's functional responsibility.
	
	  o _Three Circles Diagram_ – A graphic of the 3 core leadership areas.
	    ▪ **Task** – Achieving the task.
	    ▪ **Team** – Managing the team or group.
	    ▪ **Individual** – Managing individuals.
	  o As shown, the circles are interdependent but overlap.
	  o Within each core area of responsibility, Adair outlined specific items of focus (not shown here).
	
	  o _Leader Functions_ – Adair also identified functions of a leader.
	    1. **Defining the Task** – Distill the task into a clear objective that is SMART.
	    2. **Planning** – Seeking info, defining tasks, setting a vision.
	    3. **Briefing** – Briefing, allocating tasks, setting standards.
	    4. **Controlling** – Ensuring progress, maintain standards.
	    5. **Evaluating** – Assess consequences, appraise team & individual progress, enable self-evals.
	    6. **Motivating** – Be driven; select driven people; set solid targets; progress; rewards; recognition.
	    7. **Organizing** – Clarify plans and tasks, receiving feedback.
	    8. **Setting an Example** – Set an example both to individuals and to the team as a whole.
	
	  o **50:50 Rule** – A general rule applied by Adair to various situations with binary inputs.
	    ▪ 50% of motivation comes from an individual; 50% comes from the leader.
	    ▪ 50% of team success comes from team members; 50% comes from the leader.

Five Practices of Exemplary Leadership Kouzes & Posner (1987)	• **Five Practices of Exemplary Leadership** – The five practices below were developed by surveying people and asking "What do you do as a leader when you're performing at your personal best? 1. **Modeling** – Modeling how to act and how tasks should be performed. 2. **Inspiring** – Helping others see the endpoint & stand firm in adversity. 3. **Challenging** – Pushing others limits. Being creative. 4. **Enabling** – Conveying a sense of empowerment to get others to act. 5. **Encouraging** – Motivating others to act with passion.
Servant Leadership	

Servant Leadership
 	
Greenleaf (1970)
	• **Servant Leadership** – A leadership philosophy in which the goal of the leader is to serve. A servant leader shares power, puts the needs of the follower first, and supports the success of the team.
	  o _Pros_ – Puts a new twist on relationship focus by making the followers the first priority.
	  o _Cons_ – Can cause a disconnect if focusing on the follower's needs does not accomplish the task.
	
	• **Servant Leadership** –
	  o A servant leader is someone who, regardless of level, leads by focusing on the needs of followers.
	    ▪ Instead of the people working to serve the leader, the leader exists to serve the people.
	  o A servant Leader shares power, puts employee needs first and helps people develop / perform.
	  o A servant leader inverts the norm, which puts the customer service associates as a main priority.
	  o The term also describes someone who has no formal title as a leader.
	
	Traditional Leadership Servant Leadership

Leadership Basics

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<tr><td colspan="2" align="center">**Transactional Leadership**</td></tr>
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- **Transactional Leadership** – A style of leadership in which leaders use reward and punishments to gain compliance from their followers.
  - *Pros* – Establishes standard practices and goals and improves existing structure of the organization.
  - *Cons* – Transactional leaders operate most effectively in mature or highly structured organizations.

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<td>**Management by Objective (MBO)**

Drucker (1954)</td>
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- *Management-by-Objective* – Establishing objectives and managing to them.
  - The manager and follower jointly identify common objectives to use as a guide.
  - A key element is being able to measure actual performance in order to compare to the objectives.

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<td>**Management by Exception (MBE)**</td>
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- *Management-by-Exception* – Identifying items that deviate from the norm to drive improvement.
  - Managers are able to focus on important few issues rather than trivial many.
  - Managers make less decisions and followers have more responsibility.

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<td>**Leader Member Exchange (LMX)**

Dulebohn, Bommer, Liden, Brouer, & Ferris (2012)</td>
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- **Leader Member Exchange (LMX)** – Focused on the two-way exchange between leaders & followers.
  - The quality of the exchange influences the follower's responsibility, decisions, and performance.
  - Suggests that relationships based on trust and respect will improve organizational effectiveness.

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<tr><td colspan="2" align="center">**Transformational Leadership**</td></tr>
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<td>**Transformational Leadership**

Downton (1974)
Burns (1978)
Bass (1985)</td>
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- **Transformational Leadership** – Leadership that drives transformational change (e.g., Martin Luther).
  - *Pros* – Raises awareness and inspires followers to achieve challenging outcomes.
  - *Cons* – Less suited to everyday leadership needs.

- Principles typically associated with transformational leadership (The 4 I's).
  - *Idealized Influence* (II) – The leader sets an example for followers; the leader "walks the talk".
  - *Inspirational Motivation* (IM) – The leader inspires followers with a vision.
  - *Individualized Consideration* (IC) – The leader demonstrates genuine concern for individual needs.
  - *Intellectual Stimulation* (IS) – The leader challenges followers to innovate & change the status quo.

  Note: A transformational leader's charisma is created from the first two I's above (i.e., II and IM).

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<tr><td colspan="2" align="center">**Authentic Leadership**</td></tr>
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<td>**Authentic Leadership**

George (2003)</td>
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- *Authentic Leadership* – Authentic leaders recognize their intrinsic motivations (like making a difference in the world) and balance them with extrinsic motivations (like running a company to make money).
  - *Pros* – Is a growing field in academic research.
  - *Cons* – The concept is still in its infancy; most articles on the topic are theoretical vs. data driven.

- The concept of authentic leadership was promoted by of former Medtronic CEO Bill George.
  - Asserts that authentic leadership is founded in personal history and life's "trigger events".
  - Interpreting trigger events creates self-identity and influence a leader's *morals* and *values.*
  - Authenticity in leadership is rooted in one's ideals and values, so it is resistant to traditional. training programs; development involves guided self-reflection based on a life-story approach.

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Leadership Basics

MANAGEMENT CONCEPTS

People Management	
Note: The techniques below are drawn from the 1936 book, How to Win Friends and Influence People by Dale Carnegie. The book is considered a classic that highlights how to succeed with other people. Some text has been edited for formatting/style.	
Fundamental Techniques in Handling People Carnegie (1936)	• _Don't Criticize, Condemn, or Complain_ – Human nature does not like to admit fault. When people are criticized or humiliated, they rarely respond well and will often become defensive and resentful. • _Give Honest and Sincere Appreciation_ – Appreciation is one of the most powerful tools in the world. People will rarely work well under criticism, but honest appreciation brings out their best. o True appreciation is more than simple flattery; it must be sincere and meaningful. • _Arouse an Eager Want in Others_ – To get what you want from others, forget your own perspective and see things from the other person's point of view. Frame your goals from their perspective.
Getting Others to Like You Carnegie (1936)	• _Be Genuinely Interested in Others_ –The only way to make quality, lasting friendships is to learn to be genuinely interested in them and their interests. • _Smile_ – Happiness does not depend on outside circumstances, but rather on inward attitudes. Smiles are free, and have an amazing impact on others. Smile in everything that you do. • _Remember a Person's Name_ – A person's name is the sweetest and most important sound in any language." People donate large amounts of money just to have something named after them. • _Encourage Others to Talk; Be a Good Listener_ – An easy way to become a good conversationalist is to encourage others to talk and to be a good listener. A good listener shows genuine interest in what other person has to say (asks questions). People often just want someone to hear them. • _Talk in Terms of the Other Person's Interest_ – A road to people's hearts is talking about the things that they treasure most. They will feel valued, and will often respond in kind. • _Sincerely Make People Feel Important_ – Treat other people the way you would like to be treated. Make them feel important in a sincere and appreciative way.
Winning People to Your Way of Thinking Carnegie (1936)	• _Avoid Arguments_ – When you argue with someone, you will ultimately lose (regardless of whether you win or lose the argument). The person who loses the argument will often harbor resentment. • _Show Respect_ **–** Never tell people flat out that they are wrong, as it insults their pride and will only offend them. No one likes to be humiliated. Be honest without being blunt (also see below). • _Admit Mistakes_ – If you are wrong, you should admit it immediately. Admitting a mistake will often help you succeed, because it builds trust and encourages people to sympathize with us. • _Begin in a Friendly Way_ – "A drop of honey can catch more flies than a gallon of gall." Even if you are greatly upset, begin an interaction in a friendly way and people will be more receptive. • _Start with Questions Answered with a "Yes"_ – Begin by emphasizing what you agree on, as starting in the affirmative will often continue. Do not focus on differences or tell someone they are wrong. • _Let the Other Person Talk_ – People do not like listening to someone boast; they enjoy talking. Let them talk about an idea and rationalize it themselves; it will taste sweeter in their own mouth. • _Let the Other Person Own the Idea_ – People inherently like ideas they arrive at on their own better than those that are handed to them. Let people think they arrived at an idea themselves. • _See Things from Their Perspective_ – People may be wrong, but you must seek to understand them. Success in dealing with people requires a grasp of the other person's viewpoint. • _Be Sympathetic to Others_ – People hunger for sympathy and first want us to understand what they desire and feel. If we can sympathize with their perspective, it frees them to see our side as well. • _Appeal to Nobler Motives_ – Everyone likes to be noble, and will do things for noble and morally upright reasons. Appeal to noble motives to convince them to follow our ideas. • _Dramatize Your Ideas_ – In this fast-paced world, simply stating a truth isn't enough. The truth must be made vivid, interesting, and dramatic. Advertising has been doing this for years. • _Throw Down a Challenge_ – Everyone desires to excel and prove their worth. If we want someone to do something, give them a challenge and they will often rise to meet it.

Leadership Basics

Changing People Without Giving Offense Carnegie (1936)	• *Begin with Honest Appreciation* – People will do things begrudgingly for criticism and an iron-fisted leader, but they will work wonders when they are praised and appreciated. • *Call Attention to Mistakes Indirectly* – No one likes to make mistakes, especially in front of others. Scolding and blaming only serve to humiliate. Subtly and indirectly explain mistakes. • *Talk About Your Mistakes* – When something goes wrong, taking responsibility can help win others to your side. People do not like to shoulder all the blame, acknowledging your mistakes helps. • *Ask Questions Instead of Giving Orders* – No one likes to take orders. If we offer suggestions, rather than orders, it will boost others confidence and allow them to learn quickly from their mistakes. • *Let Others Save Face* – Nothing diminishes a person's dignity like an insult to pride. Don't condemn employees in front of others and allow them to save face when recovering from a mistake. • *Praise Every Improvement* – Abilities wither under criticism, but blossom with encouragement. People love to receive praise, and genuine praise for even small advancements to drives motivation. • *Give Others a Reputation to Live Up To* – If we give people a great reputation to live up to, they will desire to embody role. People will work with vigor and confidence if they believe they can be better. • *Make the Fault Seem Easy to Correct* – If a fault seems hard to fix, people will often lose heart. If the fault seems easy to correct, they will more readily jump at the opportunity to improve. • *Make Others Happy About Your Suggestion* – If we want to influence people and become effective leaders, we must learn to frame our desires in terms of others' desires.

Dealing with Difficult People (General)
 	
Various Sources
Brinkman & Kirschner (2013)
	• General strategies for dealing with difficult people:
	  ○ Be calm
	  ○ Understand the person's intent (see right →)
	  ○ Get perspective from others
	  ○ Actively listen (clarify, summarize, confirm)
	  ○ Reduce differences (build rapport)
	  ○ Speak to be understood (monitor your tone, state your intent, be honest & stay flexible)
	  ○ Focus on what can be changed (see below ↓)
	  ○ If needed, either avoid or escalate for help
	
	• Four (4) general approaches for difficult people:
	  1. *Ignore* (never a good long-term solution)
	  2. *Avoid* (ok to allow space or escalate for help)
	  3. *Change Your Attitude* (adjust your opinion)
	  4. *Change Your Behavior* (adjust actions below)
	
	THE FOUR INTENTS
	
	Problem
	
	Controlling — Intent: Get it Done — *Know-it-All, Tank, Sniper*
	Perfectionist — Intent: Get it Right — *No Person, Whiner, Nothing Person*
	
	Focus
	
	Attention Getting — Intent: Get Appreciated — *Friendly Sniper, Grenade, Think-They-Know-it-All*
	Approval Seeking — Intent: Get Along — *Nothing Person, Maybe Person. Yes Person*
	
	People
	
	Aggressive **Assertiveness** Passive

Dealing with Difficult People (Specific)
 	
Brinkman & Kirschner (2013)
	• Specific strategies for taking action to change behaviors and deal with difficult personality types:
	
	1. **Know-it-All**: knowledgeable, assertive, outspoken
	  ○ Your Goal – Open them to new ideas; convert to an ally
	  • Know your stuff & make sure you understand their ideas
	  • Show respect and acknowledge their competence
	  • Blend your ideas with theirs; suggest changes indirectly
	
	2. **Tank**: aggressive; sees you as part of the problem
	  ○ Your Goal – Command respect; be calm & assertive
	  • Let them vent but hold your ground (no counterattack)
	  • Summarize their position (if needed, Interrupt attack)
	  • Re-focus on the solution
	
	3. **Sniper**: mocks or jokes to undermine your point
	  ○ Your Goal – Bring the sniper out of hiding
	  • Stop and look at them – don't let them hide in the group
	  • Use searchlight questions – ask them to clarify
	  • Suggest a civil future and don't overreact (use humor)
	
	4. **Grenade**: explodes in order to get attention
	  ○ Your Goal – give them attention (avoid setting them off)
	  • If they explode, take control but work to reduce tension
	  • (If needed) Take a time-out to reduce the adrenaline
	  • Aim for the heart and show genuine concern/attention
	
	5. **Think They Know-it-All**: driven by need for attention
	  ○ Your Goal – Deflate their ideas w/o putting on defensive
	  • Question firmly but politely (can you explain?)
	  • Ask for specifics; fix exaggerations (always? everyone?)
	  • Provide a way out (discuss in private?); don't argue
	
	6. **"No" Person**: task focused but strives for perfection
	  ○ You Goal – Move from fault finding to problem solving
	  • Allow them to be negative (don't try to feign positive)
	  • Acknowledge positive intent, use them as early warning
	  • Give them time to think things thru for themselves
	
	7. **Whiner**: complains but doesn't have any solutions
	  ○ Your Goal – Form a problem-solving alliance
	  • Listen and acknowledge to complaints w/o comment
	  • Don't agree or disagree, ask why, or solve problem
	  • Move to problem solving and help them with solution
	
	8. **Nothing Person**: passive, but task/people focused
	  ○ You Goal – break their silence and get them to talk
	  • Plan enough time for a discussion – avoid pressure
	  • Ask open ended questions (or use humor or guess?)
	  • Take them aside to get them to open-up
	
	9. **"Maybe" Person**: delays since no answer is perfect
	  ○ Your Goal – Help them think thru issue and take action
	  • Establish a comfort zone; don't push, but patient/calm
	  • Help them voice concerns (focus on what is <u>not</u> said)
	  • Outline options (reduce?) and reassure them
	
	10. **"Yes" Person**: wants to please others; never says no
	  ○ You Goal – Get task commitments you can count on
	  • Make it safe to be honest & talk honestly about issue
	  • Help them plan realistically (don't blame – be patient)
	  • Help them manage task completion to meet deadlines

Leadership Basics

Team Management	
Team Management	• **Team Management** – The ability to administer and coordinate a group of individuals to perform a task. o Effective team management assembles the team members, establishes goals, manages work, and effectively coordinates the interactions of the team members to accomplish the goals.
Phases of Team Development Tuckman (1965) Various Sources	• **Phases of Team Development** – The phases that most teams will experience. o Originally there were four phases, but the last was added in 1977 (others are suggested elsewhere).

Phase	Phase Details	Keys to Leader Success
Forming (Establishing the team)	▪ The group meets each other ▪ The group learns about the project & helps clarify scope ▪ Group members may be motivated, but are largely uninformed and generally on their best behavior	▪ Picking the right team ▪ Communicating a clear vision ▪ Developing a shared mental model
Storming (Resolving group conflict & tension)	▪ Members voice their opinions ▪ Conflict may arise over actions, power & status ▪ This phase may be long, short or even skipped if there are highly developed group members	▪ Calming the work environment ▪ Serving as a resource for members ▪ Promoting mutual trust
Norming (Developing a spirit of co-operation)	▪ The team learns to tolerate each other's quirks ▪ Team members develop greater intimacy ▪ A spirit of co-operation emerges ▪ The team takes responsibility for team goals	▪ Planning ▪ Engaging the team ▪ Obtaining feedback
Performing (Achieving & sustaining goals)	▪ The team members are competent and autonomous ▪ The team addresses issues with little supervision ▪ Dissent is expected and allowed per the team norms ▪ Teams may regress to earlier stages (e.g. changes, etc.)	▪ Ensuring the team has resources ▪ Clearing the team's obstacles ▪ Addressing any team regression
Adjourning (Closing the team project)	▪ The team completes all tasks ▪ The team breaks-up ▪ The team moves on (a.k.a. the Mourning phase)	▪ Ensuring progress is sustained ▪ Celebrating team success ▪ Identifying future opportunities

| **Characteristics of a High Performing Team**

Lencioni (2002) | • Here are the characteristics of a high performing team:
 o _Trust_ – Comfortable asking for help, admitting mistakes, and offering feedback.
 o _Conflict_ – Engage in unfiltered conflict around ideas.
 o _Commitment_ – Commit to decisions and plans of action.
 o _Accountability_ – Hold each other accountable for delivering on commitments.
 o _Results_ – Focus on the achievement of collective results. |
| **Five Dysfunctions of a Team**

Lencioni (2002) | • **Five Dysfunctions of a Team** – The barriers that lead to dysfunctional teams. The problem begins with an Absence of Trust, which leads to a Fear of Conflict, leading to a Lack of Commitment, etc.

1. _Absence of Trust_ – Team members doubt the good intentions of others are unwilling to be vulnerable with the group. Teams conceal mistakes, jump to conclusions, and hold grudges.

2. _Fear of Conflict_ – The desire for harmony stifles productive ideological conflict. Employees worry more about politics than problems solving. Controversial topics are avoided.

3. _Lack of Commitment_ – The lack of conflict and debate prevents team members from making decisions they will stick to. Teams have difficulty making decisions and second guess themselves.

4. _Avoidance of Accountability_ – Avoiding interpersonal conflict prevents team members from holding one another accountable. Team members miss deadlines and deliver mediocre work.

5. _Inattention to Results_ – Team members focus on individual goals and personal status instead of the collective team goals. Team members stagnate, become distracted, and focus on themselves. |

Dysfunction of Team	Role of the Leader	Tools & Practices
Absence of Trust	Set the example as one who is open & vulnerable. Develop team member trust over time.	• Personal History Exercise • Personality Profiles • Team Effectiveness Exercise • Behavioral Profiles • Experiential Team Exercise • 360 Feedback
Fear of Conflict	Mine for conflict. Resist the urge to intervene during team conflict.	• Conflict Mining • Personality Profiles • Real Time Permission • Behavioral Profiles • Thomas-Kilmann Instrument
Lack of Commitment	Force clarity and closure in decision making. Be OK if a decision later turns out to be wrong. • Lack of **consensus** is OK if everyone is heard first. • Lack of **certainty** is OK ('a' decision >' no' decision).	• Cascading Messaging (recap decisions at end of mtg) • Clear deadlines • Contingency Plans & Worst-Case Scenario Analysis • Low-Risk Exposure (make low risk decision quickly)
Avoidance of Accountability	Ensure the team confronts difficult issues. Allow team to enforce accountability themselves.	• Publication of Goals & Standards • Simple and Regular Progress Reviews • Focus on Team vs. Individual Rewards
Inattention to Results	Evaluate the need for team vs. individual status. Ensure the team focuses on collective outcomes.	• Public Declarations of Expected Outcomes/Success • Results-Based Rewards

Leadership Basics

Organizational Strategy & Goal Setting

Organizational Strategy
 	
Lencioni (2012)
	• **Organizational Strategy** – An organizational strategy is the sum of the actions a company intends to take to achieve long-term goals.
	
	• Patrick Lencioni suggests a process for documenting the organizational strategy by creating a 1-2 page "**Playbook**" that answers the following questions:
	
	  ○ *Why do we exist?* A completely idealistic statement of the reason the organization exists.
	    ▪ Start by asking "How do we contribute to a better world", and then ask "why" multiple times.
	    ▪ Possible answers: Customers, Industry Focus, Great Cause, Community, Employees, Wealth.
	
	  ○ *How do we behave?* Documents the values of the organization.
	    ▪ **Core Values** – Traits that are inherent in the organization and do not change over time.
	    ▪ **Aspirational Values** – Traits the organization aspires to.
	    ▪ **Permission to Play Values** – The minimum behavioral standards required in the organization.
	    ▪ **Accidental Values** – Unintentional traits that aren't necessarily good.
	
	  ○ *What do we do?* A non-idealistic statement of what the organization actually does.
	    ▪ Try to keep it to one sentence without jargon.
	    ▪ The answer may change over time, but only when the competitive landscape shifts.
	
	  ○ *How will we succeed?* Documents the organizational strategy to differentiate from competitors.
	    ▪ **Strategic Anchors** – Identify 3 strategic anchors that inform decision about achieving success.
	
	  ○ *What is most important right now?*
	    ▪ **Thematic Goal** – A single, top priority that creates clarity for the organization.
	    ▪ The Thematic Goal must be singular, qualitative, temporary & shared across the organization.

Organizational Goals	• **Goals** – *What* you want to achieve over a specific time period (e.g., annually). A future or desired result.
	  ○ Goals are typically big picture, longer-term, and may outline a vision.
	  ○ Goals may be either qualitative or quantitative, but quantitative goals are ideal.

Organizational Objectives	• **Objectives** – *How* you will achieve a goal. A specific outcome that supports achievement of a goal.
	  ○ Objectives are specific, shorter-term, and typically represent a deliverable from a larger goal.
	  ○ Objectives are typically quantitative, even if only binary (i.e., either it was done or not).

SMART Goals & Objectives
 	
Doran (1981)
	• **SMART Goals & Objectives** – An acronym that outlines criteria for documenting goals & objectives. (Note: as shown below, alternative words are frequently used for some of the letters in the acronym).
	  ○ **S**pecific – target a specific area for improvement.
	  ○ **M**easurable – quantify an indicator of progress.
	  ○ **A**ssignable (**A**chievable) – specify who will do it (and ensure they can get it done).
	  ○ **R**ealistic (**R**elevant) – ensure the results can be achieved (and are important to the organization).
	  ○ **T**ime-Bound – specify when the results will be achieved.

Negotiations

Getting to Yes
 	
Fisher & Ury (1981)
	• **Getting to Yes** – A book that outlines the elements for principled negotiations. These negotiations will result in agreements that are: wise, efficient, and sustain or improve relationships between the parties.
	
	• **Principled Negotiations** are negotiations "on the merits", and consist of the following 4 elements:
	  ○ *People*: Separate the people for the problem.
	    ▪ Understand perceptions, emotions, and communication issues; then work on prevention.
	  ○ *Interests*: Focus on interests, not positions.
	    ▪ Identify interests and talk about them; be hard on the problem and soft on the people.
	  ○ *Options*: Generate a variety of possibilities before deciding what to do.
	    ▪ Separate brainstorming from deciding, work to broaden options, and look for mutual gain.
	  ○ *Criteria*: Insist that the result be based on some objective standard.
	    ▪ If both sides are firm and cannot agree, use independent criteria to shape the solution.
	
	• What if they are more powerful? Develop your **BATNA** (Best Alternative to a Negotiated Agreement).
	  ○ **BATNA** – Protects from a bad decision (like a bottom line) but also maximizes your interests.
	
	• What if they won't play? Use Negotiation Jujitsu.
	  ○ **Negotiation Jujitsu** – Do not reject their proposals, do not defend against their attacks. Instead ask questions to clarify and summarize their position. Deflect their position by focusing on the problem.
	
	• What if they use dirty tricks? Tame the Hard Bargainer.
	  ○ Be principled to deal with Deliberate Deception, Psychological Warfare & Positional Pressure Tactics.
	  ○ 1) Recognize the tactic, 2) Raise the issue explicitly, 3) Question the tactic's legitimacy & desirability.

Leadership Basics

Quality Management

Deming's 14 Points Deming (1982)	• **Deming's 14 Points** – Quality pioneer Edward Deming outlined management guideposts for quality. 1. Create constancy of purpose towards the improvement of products and services. 2. Adopt a quality way of thinking. Western management must awaken to a new economic age. 3. Cease dependence on inspection to achieve quality. Build quality into a product from the start. 4. End the practice of awarding business to suppliers based on price alone. Minimize total cost. 5. Constantly improve every process involved in planning, production, and service. 6. Institute training on the job. 7. Institute leadership. The aim of supervision should be to help people and machines do better. 8. Drive-out fear from the work environment, so everyone may work effectively for the company. 9. Break down barriers between departments. 10. Eliminate slogans and targets for productivity (e.g., quotas/goals). Substitute with leadership. 11. Remove barriers that rob the hourly worker of his right to pride of workmanship. 12. Remove barriers that rob management and engineering of their right to pride of workmanship. 13. Institute a vigorous program of education and self-improvement. 14. Put everybody in the company to work to accomplish the transformation.

Performance Management

The Performance Equation
 	
Krembs (2007)
	• **The Performance Equation** – A framework for assessing the performance of others.
	
	$$P = f(c, m, e)$$
	
	• Performance is a function of Competence, Motivation, and Environment.
	  ○ *Performance* — Results (not activities).
	  ○ *Competence* — Skills, knowledge, experience (can vs. can't).
	  ○ *Motivation* — Drive or energy (will vs. won't).
	  ○ *Environment* — Anything that supports or detracts from the effort (physical, psychological, etc.).

The Reality Based Rules of the Workplace
 	
Wakeman (2013)
	• **The Reality Based Rules of the Workplace** – A framework for assessing your own performance.
	
	### Your Value = Performance + Potential – (3 x Emotional Expensiveness)
	
	• Stress is your wake-up call to adjust your thinking about the 5 reality-based rules of the workplace.
	  ○ Rule 1 – Your level of accountability determines your level of happiness.
	  ○ Rule 2 – Suffering is optional.
	  ○ Rule 3 – Buy-in is not optional.
	  ○ Rule 4 – Say "Yes" to what's next.
	  ○ Rule 5 – You will always have extenuating circumstances.

Mistake Types
 	
Various Sources
	• **Mistake** – An action or judgment that is misguided or wrong.
	  ○ Mistakes are normal and they are often how we learn.
	  ○ Consider a true mistake as a learning opportunity and be thoughtful about the consequences.
	
	MISTAKE CLASSIFICATION
	
	High — Oversight ('Oops' Mistake) / Miss ('Ouch' Mistake)
	Low — Naiveté ('Aha' Mistake) / Inexperience ('Aww' Mistake)
	
	Subject Matter Knowledge (vertical axis)
	Care / Thoughtfulness in the Decision — Low to High (horizontal axis)
	
	• Mistake Classification:
	  ○ *Miss (Ouch)* – A well thought out decision about a well-known subject. These mistakes are a true miss; the most acceptable type of mistake.
	  ○ *Oversight (Oops)* – A quick decision about a well-known subject. These mistakes are sloppy mistakes (an oversight); be more thoughtful.
	  ○ *Inexperience (Aww)* – A well thought out decision about a little-known subject. Learning will help address these "stretch" mistakes.
	  ○ *Naiveté (Aha)* – A quick decision about an unfamiliar subject. These mistakes should diminish with both time and experience.
	
	• Mistakes can be forgiven based upon the person's intent and whether learning will occur.
	  ○ What was the person's intent? Forgive mistakes if there was no malfeasance or malicious intent.
	  ○ Will there be learning? Forgive mistakes if a person if they will change their approach in the future.

Leadership Basics

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<td>Conflict</td>
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- **Conflict** is a serious disagreement or argument.

- Conflict can be analyzed by considering if it is primarily focused on facts, opinions, or solutions.
  - *Inputs* – Facts (quantifiable) and Opinions/Values (subjective). *Note: see the first matrix below (inputs).*
  - *Outputs* – Solutions (what to do in the future). *Note: also see the first matrix below (cooperativeness).*

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Conflict Types

Various Sources

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- **Conflict Types** – Used to classify conflicts according to their basis (facts or opinions) and the openness of the other side about the inputs (low to high).
  - ***Basis of the Conflict***: Is the conflict based on differences in facts or opinions/values/styles.
  - ***Opponent Cooperativeness:*** How willing is your opponent to work with you on a solution.

- Some analyses break conflict into different categories (e.g., task, relationship and process conflict, substantive or affective conflict, etc.). These categories are nuances of the ones below (fact/opinion).

- For a given Conflict Type, consider the best *Conflict Management Style* (see below) to work towards a solution. Although any style should be considered, the suggested styles are often most likely.

CONFLICT TYPES

- *Substantive Disagreement*: Competing ideas about facts, with both parties open to resolution.
  - Collaborate or Compromise (see definitions below)

- *Subjective Disagreement*: Competing ideas about values, with both parties open to resolution.
  - Collaborate, Accommodate, or Compromise

- *Substantive Argument*: Competing ideas about facts, with both parties firmly entrenched.
  - Compromise Command, or Avoid

- *Subjective Argument*: Competing ideas about values, with both parties firmly entrenched.
  - Avoid, Accommodate, or Compromise

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Conflict Management Styles

Thomas-Kilmann (1974)

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- **Conflict Management Styles** – The following framework outlines different styles for working towards a solution by adjusting your assertiveness and cooperativeness.
  - ***Your Assertiveness*** – The degree to which you seek to meet your needs.
  - ***Your Cooperativeness*** – The degree to which you seek to meet other people's needs.

CONFLICT MANAGEMENT STYLES

- *Collaborate (Win-Win)*: Use to get commitment, promote understanding, and support learning.

- *Command (Win-Lose)*: Use for quick decisions, unpopular issues, and when certain you're right

- *Compromise (Draw)*: Use to avoid an endless standstill, to try ideas, or to cut losses when losing

- *Accommodate (Lose-Win)*: Use when your needs aren't vital, to build goodwill, or to cut losses

- *Avoid (Lose-Lose)*: Use when emotions are high, you need more info, or will likely lose.

- The following problems can occur if you are excessive in using the styles above.
  - ***Collaborators*** can overanalyze a situation or spend too much time seeking consensus.
  - ***Commanders*** are open to mistakes from not listening or attacking others.
  - ***Compromisers*** can make all of the mistakes above.
  - ***Accommodators*** can excessively defer to other's needs to the determent of everyone.
  - ***Avoiders*** can unnecessarily procrastinate or delay in resolving a conflict.

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Leadership Basics

Administration	

Completed Staff Work
 	
Rehm (~1945)
Damminger (1953)
	• **Completed Staff Work** – A concept that emphasizes that a subordinate is responsible for studying, assessing, and submitting recommendations in a way that simplifies the decision for the leader.
	    ○ The concept highlights what subordinate should strive for in their work.
	    ○ The concept was formalized in a memorandum under General MacArthur during WWII.
	    ○ The concept has been summarized various shorter versions (below).
	
	COMPLETED STAFF WORK
	
	**HOW FOLLOWERS DO IT**
	
	• _"Completed staff work"_ is a doctrine of this office.
	• **Completed staff work** is studying a problem and presenting a solution so that all that is left is the boss's final decision.
	    ○ Work out the details – consult others – study, write, repeat
	    ○ Don't simply ask the boss what to do
	    ○ Don't present a long memo or explanation
	    ○ Ask for feedback on a solid draft; not a half-baked idea.
	    ○ Simplify things in order to free time for the boss
	• If you were the decision-maker, would you stake your professional reputation on your proposal? If not, it isn't **completed staff work**!
	
	**HOW BOSSES GET IT**
	
	• **Completed staff work** is assigning a problem and requesting a solution in such a way that success is highly likely.
	    ○ Know the problem
	    ○ Make one person responsible for the solution
	    ○ Clearly state the problem, scope and constraints
	    ○ Provide the advantage of your experience
	    ○ Set a time limit
	• If you were the follower, would you agree the guidance is adequate? If not, you won't get **completed staff work!**

Effective Business Writing
 	
Various Sources
US Army
	• Golden Rules for effective business writing.
	    A. _Put the Bottom-Line Up-Front_ (BLUF)
	       ▪ Start an email with the request, recommendation or proposal (i.e., in the first sentence).
	       ▪ Write with the conclusion at the start (inductive reasoning) vs. the end (deductive reasoning).
	       ▪ Put details at the bottom or in appendices.
	
	    B. _Use the Active Voice_ (instead of the Passive Voice)
	       ▪ Be specific and direct. For example: "He made the decision" vs. "the decision was made".
	
	• Five (5) general principles for effective writing that minimize time, effort and confusion.
	    1. **Accuracy** – Provide only essential and accurate facts free of bias or distortion.
	    2. **Brevity** – Stick to essentials. Be brief and to the point. If necessary, attach details in annexes.
	    3. **Clarity** – Keep writing direct, clear and understandable. Express your exact meaning.
	    4. **Coherence** – Logically arrange content. Use an outline for complex topics.
	    5. **Unity** – Adhere to a single idea in each sentence, paragraph, and the entire message.

Meetings
(Basic)
 	
Various Sources
	• **Meetings** – When two or more people come together at a planned time to discuss one or more topics.
	
	• All meetings (especially those that last 1-hour or longer) should have the following items:
	    1. Goal
	    2. Agenda
	    3. Decisions on Next Steps (who, what, when)
	    4. Meeting Minutes
	
	• The meeting organizer must plan to spend additional time before/after the meeting to ensure success.
	    ○ As a rule of thumb, the organizer (and/or their administrative assistant) should plan on spending at least 1-hour before and 1-hour after any 1-hour meeting for preparation and follow-up.
	       ▪ _Before Meeting_ – Plan for the meeting goal, agenda, and arrive early to set-up and get ready.
	       ▪ _After the Meeting_ – Document the meeting minutes and follow-up on actions.

Meetings
(Advanced)
 	
Lencioni (2012)
	• Meetings are a good indicator of organizational health.
	    ○ **Meeting Stew** – trying to address too many topics in one meeting.
	
	• Four (4) meeting types are suggested for an organization.
	    1. **Daily Check-In** _(Administrative: 5-10 min daily)_ – Used for quick info exchange.
	    2. **Weekly Staff** _(Tactical: 45-90 min weekly)_ – Review scorecard (RYG), then focus on tactical issues.
	    3. **Ad-Hoc Topical** _(Strategic: 2-4 hours monthly)_ – Dig into critical strategic issues that require time.
	    4. **Quarterly Off-Site** _(Developmental: 1-2 days quarterly)_ – Review the industry, organization and team.
	
	• Checklist for successful meetings.
	    ○ Tactical and strategic issues are discussed separately.
	    ○ Tactical meeting agendas are set only after the team has reviewed progress vs. goals.
	    ○ Strategic meetings have enough time for clarification, debate and resolution.
	    ○ Quarterly meetings are done off-site to step-back and get a fresh perspective on key issues.

Leadership Basics

APPENDICIES

Appendix A: Leadership Assessment		

Short-Term Leadership Assessment

- **Short-Term Leadership Assessment** – How well do you perform in each area?

  Advantage `1` Strength `2` Neutral `3` Weakness `4` Shortcoming `5`

AREA	SCORE	COMMENTS
Lead by example		
Be optimistic - Optimism magnifies leadership		
Go and see what is going on for yourself		
Ask questions		
Make complex things simple		
Communicate regularly		
Share information whenever possible		
Maintain an appropriate leadership presence		
Praise in public and criticize in private		
Build long term relationships		

- **Action Plan**

Strategic Leadership Assessment

- **Strategic Leadership Assessment** – How well do you perform in each area?

  Advantage `1` Strength `2` Neutral `3` Weakness `4` Shortcoming `5`

AREA	SCORE	COMMENTS
Leadership		
Trait Leadership		Top 3 Traits
- Charisma		
- Leader Presence		
Behavioral Leadership		Top 3 Behaviors
Contingency Leadership		
Functional Leadership		
Servant Leadership		
Transactional Leadership		
Transformational Leadership		
Authentic Leadership		

AREA	SCORE	COMMENTS
Management		
People Management		
Team Management		
Org. Strategy & Goal Setting		
Negotiations		
Quality Management		
Performance Management		
Conflict Management		
Administration		

- **Action Plan**