Leadership can be learned; in fact, it has to be learned.
There are very few born leaders.

Peter Drucker

Learning is defined as a change in behavior.
You haven’t learned a thing until you take action and use it.

Don Shula and Ken Blanchard

I think a major act of leadership now, call it a radical act, is to create the places and process so people can actually learn together, using our experiences.

Margaret J. Wheatley

The proof you have learned something is in your ability to do something at an increased capability.

Brian McDonald
MOR [Maximizing Organizational Resources] provides:

» Leadership Development
» Data Analytics
» Talent Management
» Strategic Consulting
» Executive Coaching

About MOR

Talent Management
Like everything else in this world, recruiting, retaining, and developing the best talent increasingly demands a systematic approach and specialized activities. MOR’s talent management services support the work of senior business leaders, talent management officers and HR professionals.

Strategic Consulting
Whether working through difficult challenges, engaging groups to think and interact in new ways, or facilitating strategic thinking, MOR Associates consultants are astute partners for leaders seeking to position their organizations for future success. We understand how leaders think and work; we understand organizational dynamics; and we understand how to use process to maximum effect.

Leadership Coaching
MOR’s seasoned, professional coaches have helped thousands of individuals achieve higher levels of performance. Coaching is an important facet of what we do and takes many forms:

» Ongoing coaching relationships beyond our leadership development programs
» Stand-alone leadership coaching
» One-on-one debriefs as part of our 360 feedback survey service
» Train-the-trainer programs to develop organizational coaching capacity

Data Analytics
Leaders need to develop strategies and make decisions based on evidence supported by analysis. MOR Surveys offers tailored services designed to gather, analyze, and report useful information. MOR offers customer satisfaction surveys, employee engagement surveys, and 360 multi-rater feedback surveys. Our survey services are virtually turnkey and we provide expert assistance in survey design, methodology, administration, analysis, reporting, and communication.

Customized Leadership Development
MOR Associates offers a proven approach to building leaders that combines feedback, individual development goals, one-on-one coaching, workshop instruction, and applied learning. Thousands of leaders from public, private, and non-profit organizations have realized significant, lasting benefits from our programs, and their organizations have benefited from the improved ability of these leaders to deliver results.

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Educause Pre-Conference Workshop

Tues, Oct 31, 2017 – Leading, Managing, and Doing, How Do you Get It All Done?

Participants will:

• Appreciate the distinctions between leading, managing and doing the work.
• Assess their own role, responsibilities and determine what ratio of leading or managing or doing is appropriate for the position they hold.
• Acknowledge the external trends influencing the future direction of IT in higher education and how leaders can respond to this evolving context

This workshop will provide individuals with the opportunity to learn about leading in a higher education IT environment. Participants will be engaged in interactive exercises to help them reflect on their current approach to their work and how they could enhance their effectiveness.

I Opening Comments & Introductions

II You Are Paid for Your Time & Your Talent - How Do You Use These?
• Distinguishing between leading activities, managing responsibilities as differentiated from doing the work itself
• Assessing how much time you spend leading or managing or doing (L/M/D)
• Given your role, what would be the right ratio for leading-managing-doing?

III An Introduction to Coaching As a Way to Explore Your L/M/D Scores
• Coaching as differentiated from advising
• Learning to listen and ask open ended questions
• Focusing on your L/M/D ratio and how you might change this if needed

IV Focusing on the Important versus the Immediate
• The unconscious conspiracy to prevent you from doing anything important
• Strategies for making the work week more focused, productive & meaningful
• Two keystone practices that are “game-changes”
• Could you actually develop new habits/new behaviors?

V The Leader’s Role Is to Focus on the Future
• Explore the forces and trends influencing the context for higher education IT
• Developing your strategic lens
• Positioning your organization to renew its value proposition
4 E’s Worksheet

KEY QUESTION: How would you describe your presence?

Think for a few moments about your “presence” and how you normally interact with others in the workplace and answer the questions below.

How do you Enter a new situation?

__________________________________________________________________________

__________________________________________________________________________

What Energy do you bring into the room?

__________________________________________________________________________

__________________________________________________________________________

How do you choose to Engage?

__________________________________________________________________________

__________________________________________________________________________

How do people assess the Ethos of your character?

__________________________________________________________________________

__________________________________________________________________________

If you were to work on enhancing your presence, what would you do differently?

__________________________________________________________________________

__________________________________________________________________________

Be intentional about your presence.
**KEY QUESTIONS**

<table>
<thead>
<tr>
<th>What is leadership?</th>
</tr>
</thead>
<tbody>
<tr>
<td>How is leadership different from managing?</td>
</tr>
</tbody>
</table>

**KEY IDEAS**

Leadership is about doing the right things. Management is about doing those things right.

Peter Drucker

The only true leader is someone who has followers. An effective leader is not someone who is loved or admired. He or she is someone who has followers who do the right things. Popularity is not leadership. Results are. Leaders are highly visible. They, therefore, set examples. Leadership is not rank, privileges, titles or money. It is responsibility.

Peter Drucker

The essence of leadership is found in the ability to transform vision into significant actions. The two dimensions are vision and the ability to implement. To this end, the leader’s chief resource is power: the capability to get things done.

William Hitt

I’m talking about leadership as the development of vision and strategies, the alignment of relevant people behind those strategies, and the empowerment of individuals to make the vision happen despite obstacles.

John Kotter

---

### Leading Versus Managing

<table>
<thead>
<tr>
<th>Leaders</th>
<th>Managers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provide direction</strong></td>
<td><strong>Plan</strong></td>
</tr>
<tr>
<td>• Establish the vision</td>
<td>• Set goals and targets</td>
</tr>
<tr>
<td>• Develop the strategies</td>
<td>• Establish goals to achieve the plan</td>
</tr>
<tr>
<td>• Cope with change</td>
<td>• Allocate resources</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Align people</strong></th>
<th><strong>Organize</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Communicate the direction</td>
<td>• Create structure</td>
</tr>
<tr>
<td>• Engage people in implementation</td>
<td>• Develop staffing</td>
</tr>
<tr>
<td>• Build commitment</td>
<td>• Communicate the plan</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Motivate</strong></th>
<th><strong>Coordinate and control</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Hold up the banner</td>
<td>• Identify deviations</td>
</tr>
<tr>
<td>• Coach and empower</td>
<td>• Solve problems</td>
</tr>
<tr>
<td>• Recognize and reward success</td>
<td>• Measures results against plans</td>
</tr>
</tbody>
</table>

Adapted from *What Leaders Really Do*, John Kotter, Harvard Business Review
<table>
<thead>
<tr>
<th>AGENDA FOCUS</th>
<th>Personal producer</th>
<th>Planning and budgeting</th>
<th>Establishing direction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• focus on operational tasks</td>
<td>• draft goals and operational plans</td>
<td>• track external trends</td>
</tr>
<tr>
<td></td>
<td>• get core work done</td>
<td>• allocate resources</td>
<td>• anticipate future needs</td>
</tr>
<tr>
<td></td>
<td>• do high risk, high visibility items</td>
<td>• submit budgets</td>
<td>• develop vision and strategies to achieve goals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PEOPLE FOCUS</th>
<th>Self and boss</th>
<th>Organizing and staffing</th>
<th>Inspiring commitment and aligning people</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• high ownership for the work</td>
<td>• individuals, teams</td>
<td>• communicate direction</td>
</tr>
<tr>
<td></td>
<td>• want to succeed, please the boss</td>
<td>• establish structure to accomplish plan</td>
<td>• engage others in formulating and undertaking strategic pursuits</td>
</tr>
<tr>
<td></td>
<td>• personal statistics</td>
<td>• assign responsibilities</td>
<td>• work on raising people’s commitment levels</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROCESS FOCUS</th>
<th>Being the best player</th>
<th>Controlling and problem-solving</th>
<th>Developing capability needed for the future</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• do it myself</td>
<td>• monitor results vs. plan</td>
<td>• build organizational capability required to accomplish strategic goals</td>
</tr>
<tr>
<td></td>
<td>• whatever it takes</td>
<td>• identify deviations, variances</td>
<td>• oversee high-potential leader development</td>
</tr>
<tr>
<td></td>
<td>• do it right</td>
<td>• facilitate problem-solving</td>
<td>• challenge and coach</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• develop systems for repetitive processes</td>
<td>• recognize and reward</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RESULTS FOCUS</th>
<th>Individual results</th>
<th>Operational results</th>
<th>Strategic results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• produce outcomes</td>
<td>• produce stakeholder outcomes: quality, service, cost, on budget</td>
<td>• position the organization to add value in the future</td>
</tr>
<tr>
<td></td>
<td>• produce high quality individual contributions</td>
<td>• produce degree of predictability and order via systems and processes</td>
<td>• new business direction and strategies</td>
</tr>
<tr>
<td></td>
<td>• role model style to others</td>
<td></td>
<td>• new processes, products</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• new organizational capabilities</td>
</tr>
</tbody>
</table>
Leading-Managing-Doing Worksheet

How do you think you currently divide your time between activities related to leading, managing, and doing?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Would you change this distribution in any way?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

Where are there opportunities for you to play more of a leadership role?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

What do you need to do to enhance your ability to act in leaderly ways?

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________

lead•er  
noun  
what one is being when one exercises leadership; not a formal position, but a function that anyone can do irrespective of title or status
Leading, Managing, and Doing: How Do You Get It All Done?
MOR Associates

Leading-Managing-Doing Worksheet

The immediate is always threatening to preempt the important, and people who are looked to for leadership are often too busy with current priorities to deliver it. Complete the first two tallies and pie charts today and fill in the last one at a future date to check in on how you fared.

Today, , what percent of your time do you spend on each of the following activities?

Leading %

+ Managing %

+ Doing % =100%

What percent of your time would be desirable for you to spend in each of the following activities?

Leading %

+ Managing %

+ Doing % =100%

It's months later, how are you dividing your time now?

Leading %

+ Managing %

+ Doing % =100%
## Initial Development Goals

<table>
<thead>
<tr>
<th>Goal 1:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions:</strong></td>
<td></td>
</tr>
<tr>
<td></td>
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<tr>
<td><strong>Timeframe:</strong></td>
<td></td>
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<tr>
<td><strong>Support/Resource:</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Goal 2:</strong></td>
<td></td>
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<tr>
<td><strong>Actions:</strong></td>
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</tbody>
</table>
Focus at the strategic level to ensure the organization is doing the right things.

- A leader’s most important responsibility is to determine the overall strategic direction for the enterprise.
- A strategic focus requires the leader to be at times externally focused on the trends shaping the future while understanding the strengths, weaknesses and core capabilities of the organization.
- Charting the strategic path for the organization will have enormous consequences for the ultimate success or failure.

Focus on the results; go for the goals.

- Organizations exist to fulfill certain needs.
- Needs are better defined in specific, outcome oriented goals.
- Goals can then be measured to assess progress and allow for adjustments.
- At the end of the day results do matter.

Don’t let the immediate preempt the important.

- Too many leaders are constrained in their efforts to move the enterprise forward by the compelling tendency of many people to pull the leader into the immediate issue or day to day concerns.
- Identify the top five areas critical to your success and select the three you personally will champion.
- Block out time, schedule events to focus, focus, and focus on the priorities you believe are critical to your success.

Develop the discipline, build the practices.

- “Best Practices” companies got that way for a reason.
- Select the practices you believe will make excellence a habit not a chance act.
- Practices can sustain the desired changes if they are incorporated into the rhythm of the business.

Having passion for what you do will make an incredible difference.

- If you care intensely about what you are doing, this will influence those you lead in a positive way.
- Having passion behind what you are doing means you genuinely believe this effort has value and this conveys sincerity to others.
- You bring the energy to your role that will help build the support you will need to succeed.
Understand the environment, the politics, and the world around you.

- Where there are people there are politics, issues of influence, and power.
- You don’t need to play the political game but you don’t want to be blind-sided.
- Build the alliances needed to get support for the initiatives you are sponsoring that are key to success.

Be self aware, know your own strengths and shortcomings.

- Be reflective, know yourself and play to your strengths.
- Make the best of what you have to work with and develop yourself where gains are likely.
- Ask others to give you feedback and coaching.
- Recognize your shortcomings, where you aren’t likely to be able to develop and figure out how to compensate or complement yourself with others.
- Draw on your experiences to develop yourself.

Surround yourself with absolutely the best people.

- Finding the best talent will make an incredible difference.
- Select the best people you can find, don’t compromise on quality.
- Develop people, don’t settle for less or you’ll continually pay the price.

Being decisive is a requirement for most leaders.

- It helps to be able to sort through considerable information and cut to the chase with some dispatch.
- It is important to have the ability to move expeditiously and to have the courage of your convictions.
- Moving sooner is usually better than moving later, few leaders ever look back and wish they went slower.

Know where the money is.

- Understand the financials, don’t delegate the balance sheet.
- Analyze what the prime contributors to improved performance are and track cause and effect relationships.
- Target a few strategies directly at the financials.
Focus On the Important

Nobel laureate James Franck has said he always recognizes a moment of discovery by “the feeling of terror that seizes me... I felt a trace of it that morning. My discovery was this: I had become the victim of a vast, amorphous, unwitting, unconscious conspiracy to prevent me from doing anything whatever to change the university’s status quo. Even those of my associates who fully shared my hopes to set new goals, new directions, and to work toward creative change were unconsciously often doing the most to make sure I would never find the time to begin.

Warren Bennis, Why Leaders Can’t Lead, The Unconscious Conspiracy Continues

Put first things first. Begin with the end in mind. Be proactive.

Steven Covey, Seven Habits of Highly Effective People

George Marshall understood that leaders must spend the time to recruit the right people for the job and then support them completely, so that they can do the job. The exceptional leader sees his or her job as enabling people to do their jobs.

Peter Drucker

For me, this is a familiar image - people in the organization ready and willing to do good work, wanting to contribute their ideas, ready to take responsibility, and leaders holding them back, insisting that they wait for decisions or instructions.

Margaret J. Wheatley
**Key Questions**

What do you need to do to balance the immediate and the important?
Your calendar is a strategic asset. How do you spend your time and talent?

**Key Ideas**

Providing Leadership...
- Means focusing on the strategic.
- Requires us to spend our time on the important.
- Requires most of us to create capacity.

**The Immediate versus the Important**

*Tension Exists Between the Immediate and the Important*

<table>
<thead>
<tr>
<th>Immediate and Less/Not Important</th>
<th>Immediate and Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Immediate and Not Important</td>
<td>Not Immediate and Very Important</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Immediate</th>
<th>Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Strategic priorities</td>
</tr>
<tr>
<td>Meetings</td>
<td>Planning for the future</td>
</tr>
<tr>
<td>Crisis of the day</td>
<td>Critical business projects</td>
</tr>
<tr>
<td>Interruptions</td>
<td>Developing talent</td>
</tr>
</tbody>
</table>

**Strategies for Focusing On the Important**

- Identify the top five priorities critical to your success and select the three you will personally champion.
- Block out time; schedule events to focus on the priorities you believe are critical to success. Plan to spend time on the important. Manage your calendar, don’t let it manage you.
- Be reflective, know yourself and play to your strengths.
- Delegate to others in ways that provide people with the chance to take ownership for the decisions and actions needed.
- Develop the people who work with you. Give yourself an unfair advantage.
- Leverage your time and your talent.
Providing Leadership

Means focusing on the strategic
Requires us to balance our time on immediate demands with the important priorities
Requires most of us to create capacity

Strategies to Consider

Establish clear priorities.
Create a capacity planning practice.
Take command of your calendar.
Become more decisive.
Become a more effective communicator.
Refine your delegation process.
Develop your people via exposure, experience, and stretch assignments.

You can’t make up in tactics that which you lack in strategy.
## Mapping Your Priorities Over the Next Six Months

What are your highest priorities?

<table>
<thead>
<tr>
<th>Priority</th>
<th>Action Needed</th>
<th>Who Else?</th>
</tr>
</thead>
</table>

What actions, meetings or tasks do you need to take to move the top two priorities forward?

What entries do you need to make in your calendar to advance these initiatives?
Capacity Planning

KEY QUESTION: How much capacity do you and your team have?

Conduct a one month audit. What do the results tell you?

How can you gauge your work group’s capacity to get things done?

By estimating time, hours, and days

By determining level of effort required

Projecting forward, how could you better manage supply (time and energy) with the demand?

What strategies or practices might enable you and your group to open up some capacity to devote to the important priorities?

Spend the first 30 minutes on Monday or the last 30 minutes on Friday setting your three to five priorities for the week, then review your calendar and place them on your schedule.
Capacity Management...Practices Worksheet

Maintain a concise list of the things that are consuming your and your group’s capacity.

<table>
<thead>
<tr>
<th>Project Pipeline</th>
<th>Rough Order of Magnitude</th>
<th>Lead and/or Key Resource</th>
<th>Key Milestones</th>
</tr>
</thead>
</table>
The Decision Making Continuum

There is a range of decision making styles available to you. It is important to think about what decision making mode is most appropriate to each situation.

<table>
<thead>
<tr>
<th>Directing</th>
<th>Selling</th>
<th>Consulting</th>
<th>Participating</th>
<th>Delegating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a decision</td>
<td>You or someone above you makes a decision,</td>
<td>You ask for input and then make a decision</td>
<td>Is used when you ask and want a consensus</td>
<td>You hand off to</td>
</tr>
<tr>
<td>and inform people</td>
<td>then you sell the direction</td>
<td></td>
<td></td>
<td>someone else</td>
</tr>
<tr>
<td></td>
<td>“How will we do this?”</td>
<td>“I’ll take into consideration what I’ve heard and then decide.”</td>
<td>“Let’s decide.”</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>“You decide.”</td>
</tr>
</tbody>
</table>

Despite a cultural tendency toward consensus building, it is helpful to remember that the participating approach is most useful when you want to get input or increase ownership. In some instances, there is little benefit to working for a consensus, yet managers default to this approach and defer to the group. This can be an inefficient way to make decisions. Oftentimes, simply asking for input (consulting) will provide people with a sufficient opportunity to be heard and lessen the time required to work the decision. In any case, it is helpful if you, as a leader, are clear on what approach is best suited to the issue being addressed and that you are intentional about your decision making style. You want to create expectations with your staff that are in alignment with what you will be doing.

KEY QUESTIONS

What decision making styles are most appropriate for the different situations you encounter?

How do you differentiate between them?
Defining Delegation

Delegation Is:
- Assigning specific tasks to others, along with clear criteria for success, and the authority to complete those tasks

Delegation Is Not:
- Abdicating responsibility for a task
- Dumping work on the unprepared or unwilling
- A new and fun way to micromanage your staff

The Benefits of Delegation
- Frees up the manager’s time to focus on the important
- Draws on the strengths and expertise
  › Develops your staff
  › Provides exposure to wider experiences
  › Creates opportunities

Delegation Strategies

What to Take “Off Your Plate”
- The routine and the necessary
- Tasks that don’t contribute to group goals
- “Occupational hobbies”
- Developmental opportunities
- Consider succession
- Over-delegating is rarely a problem

What Should Stay “Yours”
- Tasks which require a level of authority
- Policy/direction setting tasks; strategic
- Personnel/confidential matters
- Crisis management
- Internal group communication strategy

Your Responsibilities
- Willingness to delegate
- Select the right task(s) to delegate
- Select the right person to delegate to; assess competence, commitment, time
- Ensure the delegate:
  › Knows what you want, clear expectations
  › Has the authority to achieve it
  › Knows how to do it or how to find out
  › Has access to necessary, relevant information
- Delegate not only tasks, but decisions
- Evaluate the risk
- Focus on results, not how it’s done
- Do not solve problems for the delegate
- Monitor progress along the way
- Be prepared to thank and reward

KEY IDEAS
The object of delegation is to successfully transfer ownership.

Effectively delegating to others is perhaps the single most powerful high-leverage activity there is.

Steven Covey,
Seven Habits of Highly Effective People
### Delegation Inventory Worksheet

<table>
<thead>
<tr>
<th><strong>What tasks can only you do?</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>What tasks could you teach others to do?</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>What tasks should you not be doing that people can do already?</strong></th>
</tr>
</thead>
</table>
**Strategies to Consider**

- Establish clear priorities.
- Create a capacity planning practice.
- Take command of your calendar.
- Become more decisive.
- Become a more effective communicator.
- Refine your delegation process.
- Develop your people via exposure, experience, and stretch assignments.

What strategies or actions will you adopt to help you focus on the important versus the immediate?
The Coaching Conversation

An effective, highly focused coaching session follows a process:
1. Set the right context – Remind the partner why you are getting together and emphasis the track that a coaching conversation follows.
2. Converge on actions – A lot of ground can be covered in a coaching conversation. A good coach can help narrow the conversation to a few key topics.
3. Seek commitments – A good coach draws out promise phrases such as “I will …,” and avoids potential phrases such as “I’ll try …” Without commitment to action, you have just had a chat.
4. Create a plan for continuity – Intentions are more like to form into results when follow-up milestones are agreed upon. Setting a timeline and planning the next coaching session creates accountability.

Listening With Care

Listening requires you to actively manage your mental processes

Concentrate
- Eliminate noise and distractions
- Decide to listen
- Stay tuned in

Ask questions
- Inquire
- Draw out

Recap
- Paraphrase
- Gather information

Express interest
- Non-verbal body language and gestures

WHEN COACHING:

NO ADVICE
NO AUTOBIOGRAPHIES
**practice**

to study, exercise one’s skill regularly or frequently so as to win greater command (e.g., to practice with a musical instrument before a performance or to practice one’s tennis serve)

a customary action or customary code of behavior

“it is their custom to dine early; it is their custom to defer to the authority figure, it is their custom to meet each morning as a team”

observable and actionable steps that can be repeated for the purpose of learning or acquiring proficiency

**best practice**

a deliberate pattern of activity that accomplishes its objective with outstanding efficiency and effectiveness, contributing to exceptional performance

---

**KEY IDEAS**

**Practices Facilitate Learning**

If an individual has a commitment to develop a new competence, then practices can facilitate the learning needed to achieve the desired proficiency.

**Coaches Need to be Competent At Designing Practices**

Managers, who often fulfill the role of coach in team-based work systems, need to become competent in designing practices. It is also important that coaches make sure the practices are implemented. During the early stages, teams may need some reinforcement for carrying through on the practices.

---

If I miss one day’s practice, I notice it. If I miss two days, the critics notice it. If I miss three days, the audience notices it.

Ignacy Paderewski, concert pianist
Worksheet - Focusing on Strategic Priorities

Focus / Priorities

What are your top strategic priorities for the next two weeks as a leader?

__________________________________________________________

__________________________________________________________

What are the top three to five things you want to get done this week to move these priorities forward?

1. __________________________________________________________________________

2. __________________________________________________________________________

3. __________________________________________________________________________

4. __________________________________________________________________________

5. __________________________________________________________________________

What actions will you take to connect with people this week?

______________________________________________________________________________

______________________________________________________________________________

Praise and Acclaim

Is there someone you want to acknowledge? Will it be a private note, email, private or public comment?

______________________________________________________________________________

Identifying Talent

Who will you encourage to step up?

______________________________________________________________________________

Messaging

What message(s) do you want to be communicating with people this month?

______________________________________________________________________________

______________________________________________________________________________
**Worksheet - Self-Managing Your Meeting Presence**

Being intentional about how you present yourself and contribute at meetings is an excellent practice. Doing this will increase your self-awareness and make you a more effective contributor. Using this worksheet before and after meetings will guide you to be more purposeful.

**Purpose(s) of the meeting**

---

**Desired outcome(s)**

---

**What is your role?**

---

**What contribution(s) will you make?**

---

**What “characters” will you need to bring to this interaction?** (facilitator, cheerleader, etc.)

---

**What is important for you to draw out of others? What process/tool will you use to engage others?**

---

Indicate below how you think the meeting should play out if your plans work out. You can add your own measures at the bottom. After the meeting, mark how the meeting actually went.

<table>
<thead>
<tr>
<th>Others did all the talking</th>
<th>&lt;&lt; More Accurate More Accurate &gt;&gt;</th>
<th>I did all the talking</th>
</tr>
</thead>
<tbody>
<tr>
<td>I let others manage the meeting</td>
<td><img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /></td>
<td>I actively facilitated the meeting</td>
</tr>
<tr>
<td>I didn’t contribute effectively</td>
<td><img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /></td>
<td>I contributed effectively</td>
</tr>
<tr>
<td>I didn’t advocate a particular view</td>
<td><img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /> <img src="rating_icon" alt="Rating" /></td>
<td>I advocated a particular view</td>
</tr>
</tbody>
</table>

| Write your own measure. | ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) |

Write your own measure.

| Write your own measure. | ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) ![Rating](rating_icon) |

Write your own measure.