

# SAMPLE WORKSHEETS

## THE BASIS FOR LEADERSHIP DISCUSSIONS AND ACTIONS

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There are sample worksheets for each of the leadership strategies. On the website they are in PDF form, so you can't change them after downloading.

If the sample worksheets work for you as they are, that's great. If you want to change them, go ahead and do that in whatever program you like. If you design your own worksheets, the basic design principle is to "keep it simple."

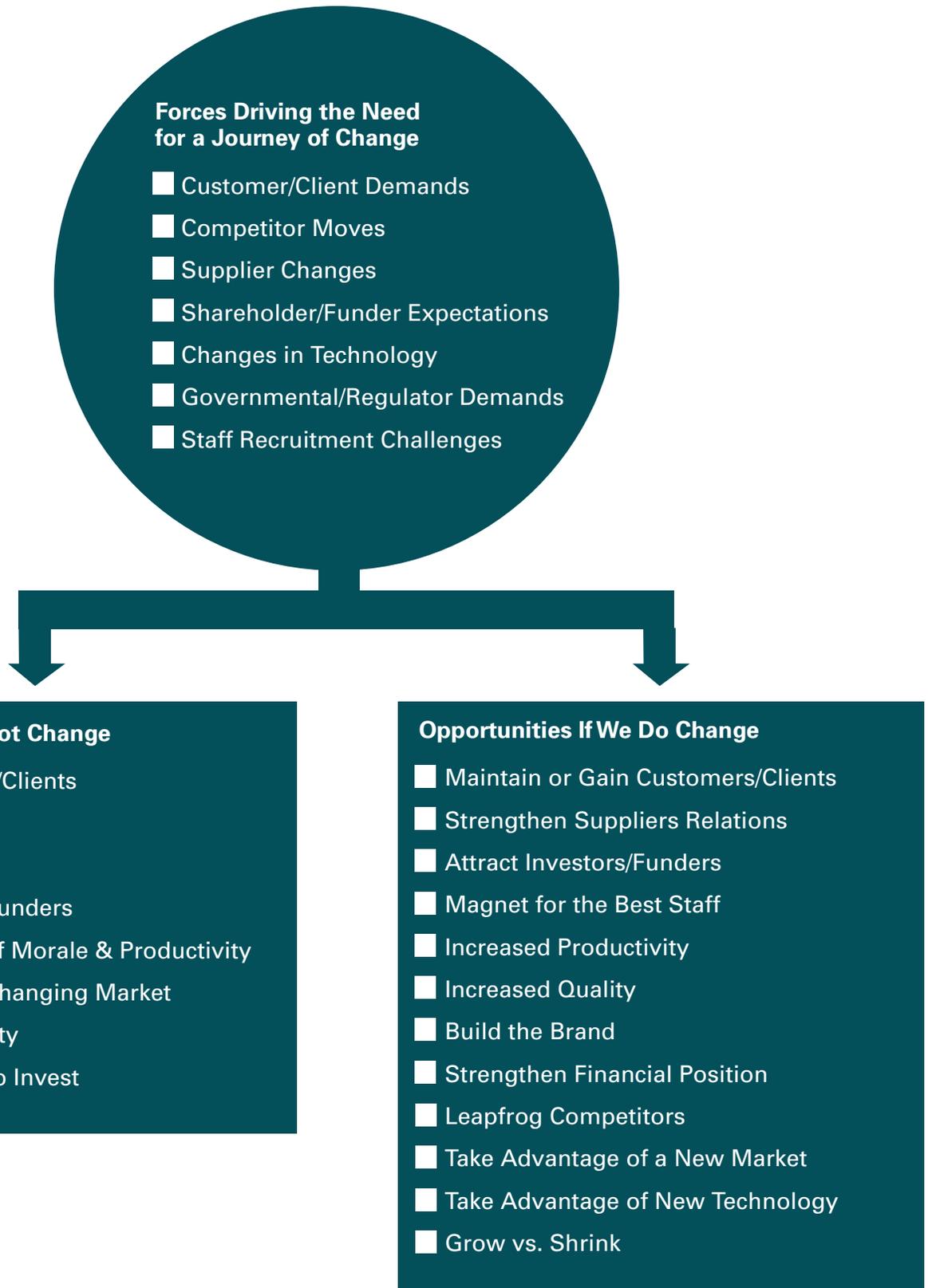
You can always add complexity where it is needed, but most of these worksheets are intended to make it as easy as possible to have the necessary leadership discussions. Full implementation may very well require more detail, but keep it simple in the beginning.

These are only samples and you may want to create several worksheets for a strategy.

- » **Please Note:** These worksheets are designed to focus attention and stimulate discussions leading to high leverage actions. They do not form a cookbook approach to leading change.
  
- » **Also Note:** Some of the worksheets are in the form of guidelines and some are more along the lines of "fill in the categories."

# Strategy #1 - Making the Business Case for Change

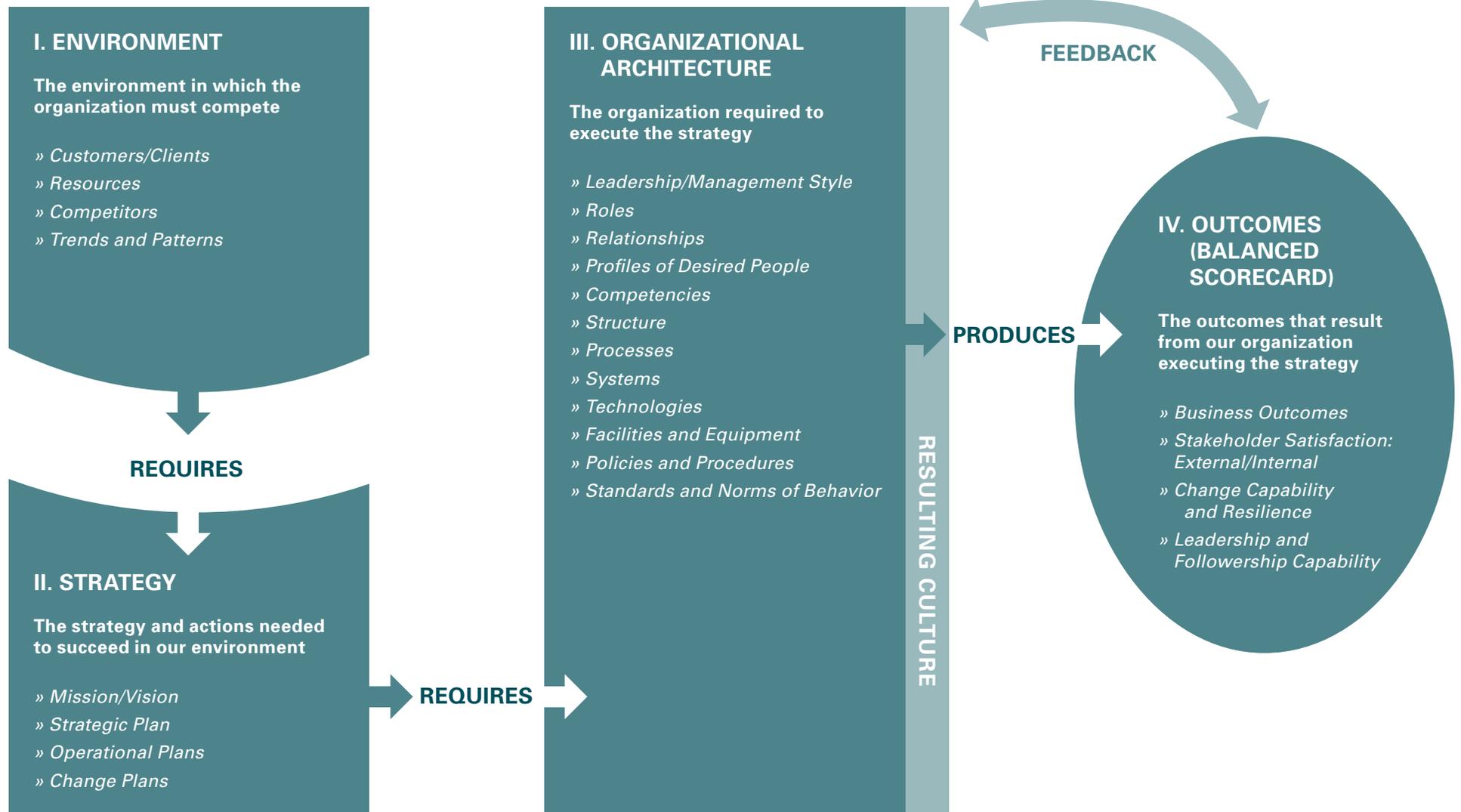
This is a very straightforward strategy. Simply identify which of these factors are combining to precipitate the need for change and create a clear and compelling picture. **Clarity is desirable. Credibility is critical.** Without clarity, confusion will reign. Without credibility, the journey is rightfully handicapped by a lack of trust right from the beginning. Where numbers can be included, include them, even if it is a range rather than a definite number. The three core parts of the business case are the forces precipitating the need for change, the consequences of not changing and the possible benefits to be achieved through a successful journey of change. **This strategy will be complemented by the vision that is held forth.**



# ORGANIZATIONAL DESIGN

BASIC TEMPLATE

*visionary*  
strategy #2: vision



# ORGANIZATIONAL DESIGN

## BASIC TEMPLATE

*visionary*  
strategy #2: vision

### FOR ORGANIZATIONS OF ANY SCALE

The template can be used for whole organizations, for a division, a department or even a team. It's just a question of scale. The design elements remain the same.

### FOR CHANGES OF ANY SCOPE

For changes that will affect a large number of the elements that make up an organization, the template provides a practical way to keep track of them all and see how they affect each other. For changes that might affect only one or two elements of an organization, the template provides a context within to see those changes and ensure that any "ripple effect" is attended to.

### FOR ALL OF THE LEADERSHIP ROLES

The organization design model is useful for all six of the leadership roles, but it is particularly important for the Visionary, Architect, Catalyst and Integrator.

### THE DESIGN ELEMENTS

#### » **The Environment.**

What is the environment asking or demanding of us? What opportunities is it offering and what threats are out there? What are the trends and patterns that we need to pay attention to. Who are the key players? This is simply the world in which we must perform to continue our organizational life.

#### » **Strategy.**

Given the environment we live in, what is our strategy for meeting the demands and dealing with the opportunities and threats? That strategy can range from mission to strategic plan to operational plans.

#### » **Organization Design.**

What kind of organization do we need to create to successfully execute our strategy? There are lots of elements that go into creating an organization and they must fit together. Operating that design to execute the strategy will also create the culture of the organization over time, which is then a 24/7 influencer of behavior. Even a department will have these elements, although of less scale and complexity than a whole organization. There are actually organizations with organizations, which is part of the challenge.

#### » **Outcomes.**

What results from the organization's execution of the strategy? The most important outcome is usually the satisfaction key stakeholders. These are usually customers or clients, but they could also be government regulators or any other stakeholder that can dramatically affect the organization. This includes a department or division that might fail to satisfy their internal customers, lose their suppliers or disappoint senior management.

#### » **Feedback.**

The feedback loop runs from the outcomes back to the organization, so that it can determine either (a) necessary change in strategy or (b) changes in the design of the organization. Feedback will be both positive and negative and must get to the right places without being diverted or denied.

How do we get the best feedback about our performance and how do we use it effectively? What feedback do we want? What methods can we use to get that feedback? Where does the feedback need to go? How will we use the feedback? How do we close the loop and respond to those that provided the feedback?

### THE FOCUS OF THE VISIONARY

#### **Making the Case for Change: What's Precipitating the Journey of Change?**

Except for executive succession, few major changes are driven by internal factors alone. The primary driving forces are usually external. The evolving nature of the environment and feedback from stakeholders about the organization's outcomes are the usual forces.

#### » **The Environment.**

What is it about the environment that is precipitating the need for the journey of change? Competitors? Suppliers? Regulators? Resources bases? Trends or patterns that imply threats or opportunities?

#### » **Outcomes.**

What outcomes have been inadequate for the health of the organization? Lack of customer or shareholder satisfaction? Deteriorating relationships with suppliers or partners? Running afoul of regulators or governments or funders? Drops in productivity of quality? Employee dissatisfaction?



# ORGANIZATIONAL DESIGN

## BASIC TEMPLATE

*visionary*  
*strategy #2: vision*

### **The Vision of the Desired State**

Can be of any level of detail, but the Visionary is usually focused on the big picture.

#### » **Strategy.**

May be changes in strategy or just changes in how to execute the strategy.

#### » **Organization Design.**

The range of detail here can vary dramatically. The Architect will add a great deal of detail and the Catalyst will add daily operational detail. The Visionary can lay out as much as is known and expected. If the Visionary does not provide much detail, the Architect needs to move quickly to add detail or people will be left with a need to go forth, but too much unknown to face.

#### » **Outcomes.**

The “so what?” question. What are the desired business outcomes? Satisfaction of key external stakeholders, such as customers, suppliers, partners and shareholders. Usually accompanied by satisfaction of employees and enhanced organization capabilities.



## Strategy #3 How the Journey Will Be Led

The key to this strategy is not to do it with great eloquence and complexity, but to simply do it and do it simply. The intent is to (1) assure people that senior leadership is attending to how the journey will be led, (2) has a coherent approach to doing so and (3) is willing to communicate their commitment clearly and be accountable for their performance.

If you are implementing the six heroic leadership roles and their strategies, you can simply say that and lay them out for people. as a centerpiece of how the journey will be conducted. If you are using another approach, you can lay out those roles or strategies.

**REMEMBER.** This strategy will go hand-in-hand with the first two strategies, which provided the rationale for the journey of change as well as a high level vision of the desired state at the end of the journey. It does not stand alone, but completes the initial work of the Visionary.

### STARTER QUESTIONS

- What will be required of us as senior leaders?
- How would we define our leadership of the journey?
- What would that look like in action?

### TEST QUESTIONS

- Will this leadership be worthy of followers?
- Are we challenging ourselves with a sense of excitement about deepening our leadership?

### SAMPLE INTRODUCTION

1. We know that we must begin a journey of significant change to maintain (or regain) the health of our organization/community. And we know why.
2. We have a clear vision of the desired state we must attain and the benefits that can be attained. And we understand the general impact the changes will have on the organization/community and its people.
3. We also have a clear picture of how we will conduct this journey of change as senior leaders. And this is what you can expect from us:

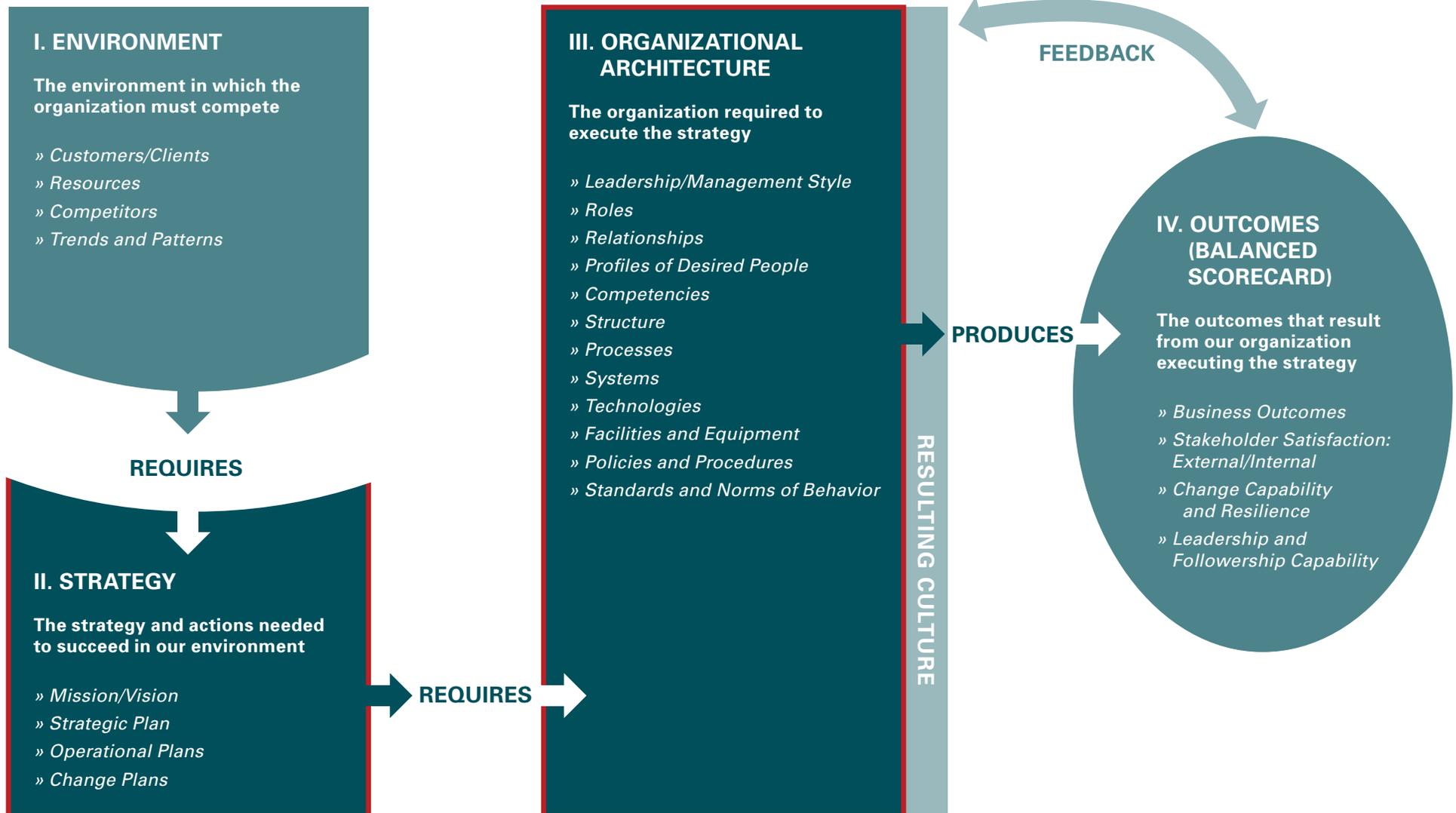
**CHANGING THE COMMITMENT.** As the journey progresses and reality unfolds, the commitment of senior leadership may need to be revised to fit and that is fine. In fact it models responsiveness as long as it maintains its credibility by matching the new requirements and available capabilities.

# ORGANIZATIONAL DESIGN

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*architect*

*strategy #4: organization design*



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### THE FOCUS OF THE ARCHITECT

#### **The Design of the Required Organization**

The focus of the Architect is on the organization design box in order to provide the detail to the Visionary's work. The Architect answers the question, "*What is the definition of the organization required to execute our strategy and achieve the desired outcomes?*" The Architect must ensure that the elements are all designed to fit together.

#### **The Plan for the Journey of Change**

This is one of the plans in the strategy box on the chart. Some of the other plans in the strategy box may need to be altered to respond to the needed changes as well.



# STRATEGY #5: PLANNING ELEMENTS FOR THE JOURNEY

Everyone has their own templates for planning, so the following topics simply need to be matched with the desired ways of planning. In creating a plan for the journey it is useful to consider several key elements: the style of the journey, direction and focus, ownership and responsibility and linkage with other plans and journeys. Those elements are outlined below. Just use them to give form to your plan for the journey. They are descriptive, not prescriptive.

## STYLE

### SPEED

How fast are we going to go on this journey? Is this a sprint or a long-distance trek? Will we go fast at some points (like the beginning) and slow at others?

### SCOPE

How much of the organization is affected? Will this involve all or most of the organization or just specific parts?

### SCALE

How many levels of the organization will be affected? Individuals? Department level? Divisions? The whole organization from smallest units on up?

### SEQUENCING

In what order must objectives be completed? What goals and objectives are dependent upon others? Which goals and objectives will take longer and must be started earlier to come together at the right time?

# DIRECTION/FOCUS

## GOALS & OBJECTIVES

It's important to short-circuit two debates here. Hierarchies of strategies, goals, and objectives vary widely from organization to organization. Some organizations see strategies as the broadest category, some see objectives and some see goals. The important point is to have everyone agrees on the hierarchy. Make a choice and stick with it. **(Common Ground)**

The other contentious topic is what should be quantitative and what should be qualitative? Common sense is an excellent quality to use. If you can legitimately quantify it, do so. If a desired outcome is more credible as a qualitative measure, do that. One other option is to alternate qualitative and quantitative measures for the planning hierarchy. For example, a broad qualitative goal might be supported by a set of objectives that are quantified. **(Common Sense)**

## METRICS

How will we know how we are doing? What do we measure to tell us where we are relative to where we want to be? The notes in the goals and objectives section above are relevant here as are the following:

- Metrics are critical for success
- The set of metrics must be balanced - the balanced scorecard approach that protects against looking at some parts of the landscape, but not others. For example, paying attention to profit and market share without also paying attention to the relationships and health of the organization producing those outcomes can rapidly undermine the sustainability of those results. Trying to pay attention to everything is foolish, but choosing a balanced set of qualitative and quantitative metrics is essential.
- **Danger.** Leaders can hide in metrics, so metrics must be kept in their place. Metrics

are indicators and guides. They are not the business or purpose of the organization. If leaders spend their time discussing the metrics, but not the sources of resistance encountered or the tough decisions that need to be made or the building of core capabilities, then metrics have become a liability.

## ACCOUNTABILITY CHECKPOINTS

At what points do we want to check our progress? Frequent and informal is best with periodic formal checkpoints. Frequent and informal is more natural and allows a more responsive posture.

## EXPECTED PITFALLS AND BARRIERS

All journeys come with pitfalls and barriers. Which ones can we anticipate? How can we prepare to deal with them?

# OWNERSHIP/ RESPONSIBILITY

## ADAPTING A FORM OF “RESPONSIBILITY CHARTING”

The classic approach to responsibility (RASCI) charting asks: “Who has the R for ultimate responsibility for a task, objective or goal? Who has veto power or the A for authority? Who is in an active support role, the S? Who has a C for consulting, being available to respond with information but not particularly active unless asked? As who has an I for needing information?” Other terms, such as the Champion or Sponsor, are frequently used.

Some form of identifying expectations is important. The classic RASCI approach is effective, but it can be adapted in many ways to fit the nature of the organization.

# LINKAGE

## LINKS TO OTHER PLANS

(Strategic, capital, operating, etc.). It is unlikely that the plan for conducting the journey will be the only plan that the organization has. Any conflicts between plans need to be resolved. There may be some simply because of the need for change represented by the journey.

## OTHER MAJOR CHANGES UNDERWAY OR ANTICIPATED

The rate of change and the complexity of organizations and their environments usually means that organizations are experiencing a number of changes at the same time. They may overlap in terms of timing or they may overlap in terms of their impacts of people and the organization. The key is to make sure that leaders are looking for other changes and managing the overlaps.

## Strategy # 6 – The Core Team of the Leadership Web - Membership and Focus

**The core team is the center of the leadership web** and worth a good deal of attention to identify the right members and then ensure that they are clear on their leadership focus. In other words, on which roles will they focus and for which roles will they play primarily a support role? For the chart below simply identify which key individuals and groups or teams should be on the core team. Then identify the roles on which they will focus. **Check:** Does the membership establish the core team as an “A” team – clearly up to the leadership challenge? Are all the roles covered well? Is anyone over-extended?

		ACT I		ACT II			ACT III	
		VISIONARY	ARCHITECT	CATALYST	GUIDE	BUILDER	INTEGRATOR	OTHER
<b>INDIVIDUALS</b>								
<b>GROUPS/ TEAMS</b>								

## Strategy # 7 – Expanding the Leadership Web - Membership and Focus

**Expanding the leadership web can be done in phases, sometimes called “expanding the circle.”** First, an expanded group is brought in to work with the core team. Then another (probably larger) group, extending further into the organization, is brought in. Each group is thus brought into an established leadership framework and the web can extend in this manner as far as desired. The key questions are (1) who do we bring in at this point and (2) what roles might they play? One issue as the web expands is scale. i.e. Are these leaders playing their roles at the organizational level? Division level? Department level? That can be noted here.

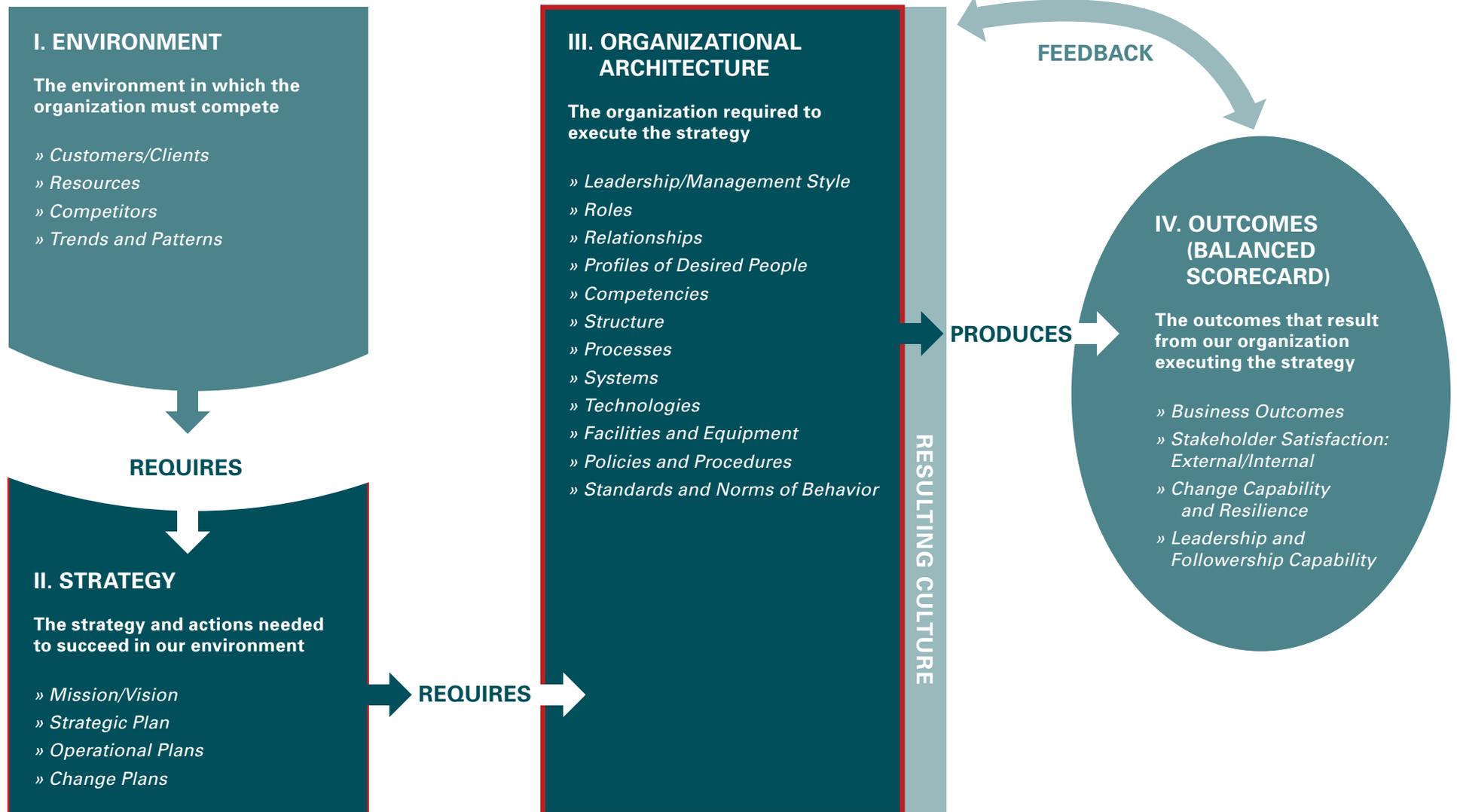
	ACT I		ACT II			ACT III	OTHER
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<b>INDIVIDUALS</b>							
<b>GROUPS/ TEAMS</b>							

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BASIC TEMPLATE

*catalyst*

*strategy #8: operational detail*



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### THE FOCUS OF THE CATALYST

#### **Operational Details for the Vision and Organization Design**

The primary focus for the Catalyst is the organization design box. Here the focus is on the units of the organization - from division to department or team. The Visionary provided the 50,000 foot view. The Architect provided the organization design required. The job of the Catalyst is to lead the process of determining what that organization design will look like in actual operation - the daily reality "on the ground." That involves lots of people adding lots of details about many elements of the organization.

#### **The Plan for the Journey of Change**

This is one of the plans in the strategy box on the chart. The Architect will have created the overall plan for the journey. The Catalyst helps units of various scale translate that plan into unity plans that lay out the realities of the journey for each of them.



## Strategy #9 – Change Readiness and Capability

Preparing people and units for success on the journey is an often overlooked, but extremely high leverage leadership strategy. Assessing their readiness and capability is an essential first step. It can provide a picture of each unit as well as the organization as a whole. Committing attention and resources in preparation saves lots of headaches, but takes discipline. Key issues are the previous experiences people have had with change, the change leadership capability of units and the expected impact on units of the current journey. It's also good to know which units are worn out from concurrent or recent changes. The actions required to prepare people will become evident relatively easily – and **responding to these needs will build a great deal of credibility for leadership early in the journey.**

KEY UNITS	EXPERIENCE WITH CHANGE (+and/or-)	CHANGE LEADERSHIP CAPABILITY	EXPECTED IMPACT OF CURRENT JOURNEY	ACTIONS TO PREPARE UNITS

## Strategy #10 Communication – Designing the Feedback Loop

Feedback is important in the beginning of a journey, but becomes increasingly important as the journey progresses. It is essential information about reality for leadership and it will not come in sufficient quantity or quality unless leadership aggressively pursues it. **The questions for leadership** in each Act of the journey are (1) what do we want feedback about, (2) who has the information we want, (3) what are the best ways to get the feedback and (4) to whom should the feedback go for assessment and action? The other question is how do we get back to people who gave us the feedback regarding what we did with it? **Note: Going after feedback also helps deal with rumors and misinformation and keeps leadership connected to people.**

	FEEDBACK ABOUT	FEEDBACK FROM	METHODS FOR GETTING FEEDBACK	FEEDBACK GOES TO
ACT I: Beginning				
ACT II: ON THE PATH				
ACT III: COMPLETION				

## STRATEGY #11: THE FIVE PHASES OF LETTING GO AND THEIR FUNCTIONS

PHASES AND THEIR FUNCTIONS/BENEFITS	BEHAVIORS AND FEELINGS OBSERVED	ACTIONS TO GAIN THE BENEFITS AND MOVE PEOPLE FORWARD
<p><b>DENIAL</b> »energy in</p> <ul style="list-style-type: none"> <li>➤ Time to recover from the initial shock</li> <li>➤ Time to prepare</li> <li>➤ Test leadership's commitment</li> <li>➤ Deal with other priorities</li> </ul>		
<p><b>ANGER</b> «energy out</p> <ul style="list-style-type: none"> <li>➤ One way to exercise power and not be passive/victim (trying to influence)</li> <li>➤ Push for involvement: roles, info, etc.</li> <li>➤ Tests leadership (leaders may be wrong about some things)</li> </ul>		
<p><b>BARGAINING</b> «energy out</p> <ul style="list-style-type: none"> <li>➤ Figuring out scope and consequences</li> <li>➤ Determine keep doing, start doing, stop doing</li> <li>➤ Exercise more influence and beginning to let go</li> </ul>		
<p><b>DEPRESSION</b> »energy in (problematic when too strong or chronic)</p> <ul style="list-style-type: none"> <li>➤ Really experiencing and coming to terms with endings and losses</li> <li>➤ Process of really letting go</li> </ul>		
<p><b>ACCEPTANCE</b> «energy out</p> <ul style="list-style-type: none"> <li>➤ Ready to engage the possible (discovery)</li> <li>➤ Ready to engage the new (mastery)</li> <li>➤ Energy free to be reinvested</li> </ul>		

*adapted from the work of elisabeth kubler-ross*

CELEBRATE	<i>(Examples: Goals and objectives achieved, Interim achievements, Worthy efforts that might have come up short of expectations (protectrisk-taking)...</i>
LEARNED	<b>About pursuing certain goals</b> <b>About journeys of change</b> <b>About our unit/organization/community</b> <b>About leadership</b> <b>About followership</b>
RIGHT ACTION	<b>Keep Doing</b> <b>Start Doing</b> <b>Stop Doing</b>
PRINCIPLES OF DYNAMIC ACCOUNTABILITY	<b>1. Do it frequently</b> <b>2. Do it informally</b> <b>3. Do it with a focus on celebration and learning first</b> <b>4. Integrate it into the more infrequent and more formal accountability checks</b>

# STRATEGY #13: MAINTAINING THE LEADERSHIP WEB

## Why Critical?

This strategy is critical because the web of leaders and followers will inevitably fray as the journey unfolds. Unfortunately, the norm is to assume that, once the web is built, it will maintain itself naturally. Wrong. Like a spider's web, the leadership web needs some spiders maintaining it.

## Key Questions

There are some straightforward questions to guide the Builder. Other questions will emerge as this strategy is executed.

- Are people prepared to lead and/or follow on the journey?
- Are the roles that people are expected to play clear? Are people connected and aligned in playing their roles?
- What is the energy level of key individuals and groups (it will vary significantly and needs to be tracked)
- What is the level of success being achieved by key individuals and groups?
- What barriers are being encountered?
- Are people acting like effective followers? On the sidelines?
- How well are individuals and units self-managing on the journey?

## Critical Success Factors

1. Make sure there are **enough people playing the leadership roles**. It is particularly important to ensure that the web extends far enough into divisions and departments involved in the change journey to achieve the reach, power and resilience required over time.
2. Make sure **enough check-ins are being done** throughout the web to stay ahead of the game. Frequent check-ins provide timely information for leadership to maintain the web effectively. They also motivate self-management at the individual and unit levels.

## Strategy #14 Muscle Building

When people perceive that there may be a significant gap between their current competencies and those required for success at the end of the journey, expect major resistance. The builder must be disciplined and have the courage to see the gaps and go after the attention and resources required to close those gaps. Committing to the required muscle building can be a major source of motivation and build leadership's credibility. **Note:** Competencies and capabilities may be individual group or organizational. The question is basically, "What must we be good at?"

COMPETENCIES/ CAPABILITIES REQUIRED	IMPORTANCE HI / MED / LOW	PLAN OF ACTION: ACTIONS, SUCCESS METRICS, TIMING, SEQUENCING, RESOURCESE, RESPONSIBILITY
INDIVIDUAL COMPETENCIES		
GROUP/TEAM COMPETENCIES		
ORGANIZATIONAL COMPETENCIES		



## Strategy #16 Managing the Ripple Effect

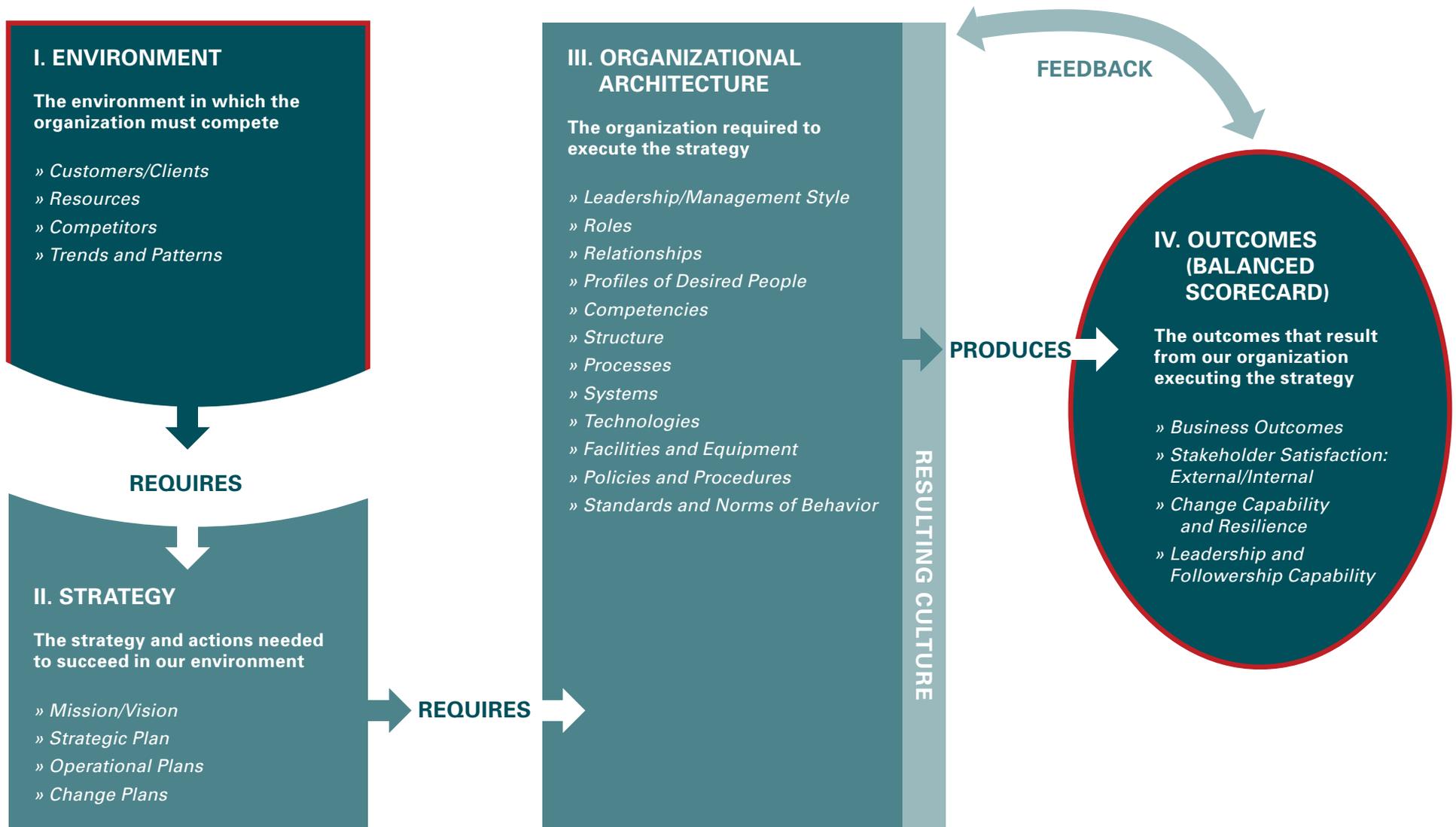
The key here is to do the homework to understand the likely impact on key stakeholders, their possible reactions and then identify strategies for preventing those reactions or responding effectively to them. Doing the homework respects stakeholders (and they will get that message) and provides the basis for engaging stakeholders in a dialogue about the impact of the needed changes and ways that they can make complementary changes as easily as possible – with whatever support can be provided. The homework also helps identify how to possibly alter the leadership of the journey to prevent some of the unwanted ripple effects. Note: This approach works on any scale, for example a department affecting other departments or an organization affecting suppliers.

STAKEHOLDERS	IMPACT OF OUR CHANGES	LIKELY REACTIONS	STRATEGIES FOR MITIGATING/ MINIMIZING IMPACT/SUPPORT FOR MAKING THE COMPLEMENTARY CHANGES

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BASIC TEMPLATE

*integrator*  
strategy #17: aligning the organization



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#### » Feedback.

The feedback loop runs from the outcomes back to the organization, so that it can determine either (a) necessary change in strategy or (b) changes in the design of the organization. Feedback will be both positive and negative and must get to the right places without being diverted or denied.

How do we get the best feedback about our performance and how do we use it effectively? What feedback do we want? What methods can we use to get that feedback? Where does the feedback need to go? How will we use the feedback? How do we close the loop and respond to those that provided the feedback?

### THE FOCUS OF THE INTEGRATOR

#### Managing the Ripple Effect

The Integrator will look both internally (the organization design box) as well as externally (the environment box) to see what impact the changes have had or might have had or might have on others. Internally, for example, mapping the likely impact on an organization chart can highlight divisions or departments that might be challenged by a change in processes or structure. Externally, an example would be mapping suppliers or customers to anticipate the impact and an implied demand for a complementary change.

#### Aligning the "Things" of the Organization

The organization design box is the main focus here. It's a matter of ensuring that the "things" - for examples structure, processes and technology - are all fitting together well. The strategy box is the other area of focus - making sure that the various plans fit the new reality.

#### Attuning the People of the Organization

Attuning people is the natural complement to aligning the "things". That all need to fit together for sustainable performance. The organization design box is the primary focus, specifically roles, relationships, competencies, and desired behaviors.



## Guide – Strategy #18 Attuning the People “Finishing Well”

KEY INDIVIDUALS	NEW LEADER/ NEW CAPABILITIES TO DEPLOY	OK OR WOUNDED?	NECESSARY MASTERY ACHIEVED OR MISSING?	ATTENTION/ ACTION NEEDED?