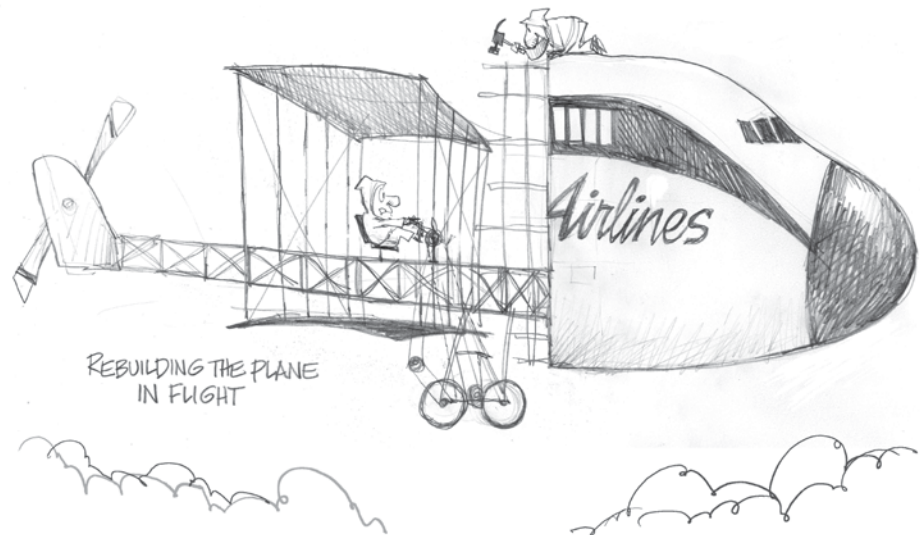


The Power of Clear Roles & Strategies

Leadership That is Aligned, Focused & Sustainable

- » **Guiding Questions for Leadership Teams**
- » **Templates for Planning & Mid-Course Strategy Checks**
- » **Templates for Adding Tactics to Strategies**



QuickStart is designed to provide structure for fast application of the key elements of heroic leadership. It is action focused. See Also:

- » "I'm Just Curious" – an overview of the book
- » The other QuickStart packets
- » The Chapter Summaries
- » The short video for each chapter



The Power of Clear Roles & Strategies

» Guiding Questions

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“You can get very specific and very practical very quickly”

Guiding Questions for Designing Leadership Strategies and Tactics

This QuickStart packet provides a set of guiding questions for you and your leadership team(s) that will walk you through the process of creating high leverage strategies and tactics for leading change – from the beginning of the journey to the end. You can get very specific and very practical very quickly. Also included are three different templates that you can use or adapt to record your work.

This is a good place to:

- 1** See how well prepared you are for a journey of change;
- 2** Assess how you’re doing and what to do next if in the midst of a journey; or
- 3** Simply see how much value there might be for you in the model of the heroic journey.

To begin, just go straight to the guiding questions. The questions are designed to facilitate highly focused conversations that lead to a coherent set of confident actions.

Other Resources

There are several resources that can support you in effectively designing your strategies and tactics and they are simple to use. The whole book is, of course, available, but the following resources are easy to access and don’t take much time to use.

The Video

You can use the nine-minute video on leadership roles and strategies on the website to support you in implementing this QuickStart. It’s on the homepage for the roles and strategies chapter.

Free Mini-Consults

There are a limited number of free thirty-minute consultations available to help teams get started or unstuck. You can sign up on the homepage of the website (www.heroicleaders.com). We really are committed to helping as many leaders as possible effectively use this model without having to hire us. Sign up for a free consultation if it will help you start or get unstuck.

The Other QuickStart Packets

Don’t overlook the other QuickStart packets – The Power of Leadership Webs, The Power of Knowledge, and The Power of Saying “Yes” (see the box on page 5). All three will support the successful implementation of the strategies and tactics developed here. Each also has a video.



“These are the key discussions that result, not only in choices of actions, but also in the effective alignment of leaders”

“That confidence is critical in going forth with a sense of sureness along with the ability to inspire confidence in others”

“Looking back may seem odd, but it often offers surprising leverage to leaders”

Why These Questions?

These are the natural questions that must be addressed in each act in the heroic journey – beginning, on the path and completion. These questions promote the discussions that result not only in choices of wise action, but also in the effective alignment of leadership.

Because these questions are natural to the heroic journey, the fundamental model of change, leaders can have a high degree of confidence that their choices of action are the best choices. That confidence is critical in going forth with a sense of sureness along with the ability to inspire confidence in others.

It becomes even more important in supporting leadership in holding the course when things get messy and confusing and the natural doubts start to undermine leadership’s resolve or the resolve of followers. That is one of the inescapable challenges on a journey of change.

How to Use the Questions

You can use the guiding questions whether you are preparing for a journey or already in the midst of one.

Planning a Journey – Look Ahead

Follow the questions in order. It is important to think through the strategies and tactics for each of the six leadership roles – Visionary and Architect in the beginning; Catalyst, Guide and Builder on the path; and Integrator in completion.

However, the Visionary and Architect (and sometimes the Catalyst) roles will determine how successful you are in beginning the journey – and beginnings matter – a lot. Strong beginnings establish leadership credibility and set up the rest of the journey for success. Weak beginnings must be overcome the rest of the way.

In the Midst of a Journey – Look Ahead & Look Back

There are two perspectives to use in the midst of a journey of change – looking ahead and looking back. Looking ahead is obvious and the task is to determine the best strategies and actions to deploy based on where you are, what you’ve learned to date and what you expect to encounter going forward.

Looking back may seem odd, but it often offers surprising leverage to leaders by identifying which strategies and tactics were not as strong as they needed to be earlier in the journey. Much of the lost opportunity can still be captured very efficiently – and it needs to be or future efforts will be hampered.



Other QuickStart Packets

*Guiding Questions and Templates for
Implementing Heroic Leadership*

Leadership Commitment



Reclaiming the heroic journey as our story – not just larger than life figures or grand deeds.

- » Leadership Lite or Leadership Leverage – leading with a sense of significance, integrity, courage and in service (beyond self)
- » Benefits of the heroic journey for individuals – leaders or followers
- » 4 Forms of Leadership Courage – the most fundamental characteristic for leaders of heroic journeys – the quality on which all other leadership qualities rely

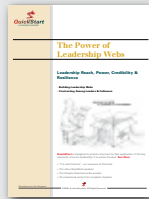
Leadership Knowledge



The foundation on which the roles and strategies are built – the rationale for the roles and strategies

- » The first test – The Threshold Guardians – they stop journeys before they really begin
- » The three tests on the path – endings and letting go, discovery and mastery and dealing with the land in between
- » The three tests in completing a journey – dealing with the “ripple effects”, aligning the organization and attuning the people

Leadership Webs



The web of aligned leaders and followers required for leadership reach, power, flexibility and resilience

- » How to build leadership webs
- » How to maintain leadership webs on the journey
- » The contract between leaders and followers
- » How followers support and challenge leaders



Visionary

Strategy #1

Why are we embarking on this Journey?

Guiding Questions

- » What's precipitating the journey? Internal forces? External forces?
- » What are the opportunities if we are successful in changing?
- » What are the threats we face if we refuse to change or are unsuccessful on our journey?

Strategy #2

Where are we going?

Guiding Questions

- » What's the big picture vision of the desired state at the end of our journey?
- » What's the likely impact on various key stakeholders of the changes and challenges involved?

Strategy #3

How will we lead this journey?

Guiding Questions

- » What leadership behaviors will our followers see in us?
- » What behaviors will our followers not see in us (equally important)?
- » What behaviors will we be asking of those following us?

Architect

Strategy #4

What kind of organization will be required to achieve the vision?

Guiding Questions

- » "Things" - structure, processes, technologies, policies, etc?
- » "People" - roles, relationships, behaviors, values, etc.
- » Which of these elements will be changing significantly and, equally important, which will not be changing significantly?

Strategy #5

What will our plan for the Journey look like?

Guiding Questions

- » What are our goals and objectives and their timing?
- » What quick wins can we build in to build confidence and momentum?
- » What resources will be required?
- » Which teams and/or individuals will be responsible for the goals and objectives and the allocation of resources?

Strategy #6

How will we build the web of leaders required for success?

Guiding Questions

- » Who will be part of the Core Leadership Team (this must be a high performing team that is clearly up to the challenge in the eyes of followers)?
- » As we look out into the organization, who else will need to be brought into the web and aligned with the Core Team?
- » Note: Members of the leadership web can be individuals or groups/teams.

ACT I

Guiding Questions: Leadership in the Beginning of the Journey

"How Do We Start Strong and Gain Commitment?"



Catalyst

Strategy #7

How do we bring enough people into the Leadership Web to build the power, reach into the organization and the resiliency we will need?

Guiding Questions

- » Who do we want to bring into the leadership web, with what roles and when?
- » How will we build the teams involved and how will we align people with the Core Team?

Strategy #8

How will we engage people in adding the operational detail to the vision?

Guiding Questions

- » Which individuals and groups do we want to engage and when?
- » What process will we use, including guidelines and facilitation of the process?
- » How will we use their work to reality-check our “big picture” vision (how does the vision work on a daily basis in the units)?

Strategy #9

How will we prepare people for success on the journey?

Guiding Questions

- » How ready are the people and units of the organization for the journey?
- » How will we prepare people? Intellectually? Emotionally? Physically?
- » How will we prepare those in the leadership web to lead effectively?

Guide

Strategy #10

What kind of communication system will we need?

Guiding Questions

- » Communications out to people (types of messages, methods...)
- » Feedback in to us (increasingly important as the journey progresses)
- » Dialogue among people (to help self-manage and support each other)

Strategy #11

How do we help people deal with the emotional challenges of the journey?

Guiding Questions

- » How do we help people let go of things, the things that must end in order to move forward (from relationships and ways of doing things to self-image...)
- » How do we help people deal with the dynamic tensions that characterize the land in between endings and beginning - sense of place vs. displacement, order vs. disorder, excitement vs. anxiety, etc?

Strategy #12

How can we hold ourselves accountable in a way that people will not resist?

Guiding Questions

- » How will we measure our progress and performance - valuing metrics without being blinded by them?
- » How can we celebrate interim achievements and worthy efforts that didn't meet expectations (protecting people's willingness to take risks)?
- » How will we learn from the experience to increase our capabilities and determine the next “right actions”?
- » What kind of positive and negative consequences can we deliver based on these outcomes?

ACT II

Guiding Questions: Leadership on the Path

“How Do We Stay On the Path, Meet the Challenges, and Stay Healthy?”



Builder

Strategy # 13

How do we maintain the Leadership web?

→ Guiding Questions

- » Which new people need to be brought into the web as the leadership needs of the journey become more clear?
- » What processes can we use to monitor the energy of people and groups as the journey progresses and respond to renew energy when necessary?

Strategy # 14

How will we “muscle build” to develop the capabilities required?

→ Guiding Questions

- » What kind of individual competencies need to be developed and how will we develop them?
- » What kind of group/team competencies need to be developed and how will we develop them?
- » What kind of organizational or systemic competencies need to be developed and how will we develop them?
- » And how will we keep the focus on building capabilities when it is so easy to lose that focus or starve the effort of resources?

Strategy # 15

The process of mastery is the deceptively difficult challenge. How will we guide people through that process?

→ Guiding Questions

- » How do we help people deal with the plateaus that happen when progress flattens out and people get disheartened?
- » How will we manage the inevitable performance dips that happen before performance goes up – shortening duration and minimizing degree of dip?

ACT II

Guiding Questions: Leadership on the Path

“How Do We Stay On the Path, Meet the Challenges, and Stay Healthy?”



Integrator

Strategy #16

How will we manage the ripple effects of our change?

Guiding Questions

- » Who is likely to be affected?
- » How might they be affected and what complementary changes will we desire of them to fit with our changes?
- » How can we help them make those changes?

Strategy #17

What do we need to do in order to ensure that all the “things” of the organization are aligned with each other?

Guiding Questions

- » How can we assess the degree of alignment and where we need to act?
- » Are we willing to redesign structure or processes or technologies to ensure alignment?
- » Where must we make changes and where can we “leave well enough alone” and tolerate some lack of alignment?

Strategy #18

How can we attune the people of the organization?

Guiding Questions

- » How do we develop common ground of values, behaviors, leadership and management styles, relationship norms, etc?
- » How will we identify the new leaders as well as new capacities and ensure that they are deployed effectively in the organization?
- » How do we maintain our leadership discipline and focus on attunement for an extended period of time (much longer than alignment)?

ACT III

Guiding Questions: Leadership in Completing the Journey

“How Do We Embed and Protect the Change?”



Three Templates for Capturing the Strategies and Tactics

There are three types of templates in the following pages that serve as examples. You can use them in the form presented or adapt them to your use. One template is very generic and simply identifies the tactics that go with each leadership strategy. The other two templates also address issues of leverage and success.

Remember, they are just examples, so feel free to adapt them to fit your needs.

Preparing to Lead a Journey

Designing High Leverage Leadership Strategies

This template lays out all of the leadership roles and their strategies, has a column for identifying the degree of leverage each offers, and space for next steps. It can be used with the template “Tactics for Change Leadership Strategies.”

In the Midst of a Journey

Mid-Course Check on Leadership Strategy Success

This template also lays out all of the leadership roles and their strategies and it has columns for both the degree of leverage and the degree of success to date. It supports leaders in looking back and finding gaps and opportunities as well as looking ahead to determine the best actions to take. This template can also be used with the template “Tactics for Change Leadership Strategies.”

For each strategy you can determine the degree of success (for those implemented already) as well as the degree of leverage they offer. For example, if you’re looking back and see that you didn’t build the business case well enough (the first strategy) and you think it still offers a lot of opportunity to achieve “buy-in,” then it becomes a high priority focus. Another strategy might not have been as successful as you would like, but doesn’t offer the same degree of leverage. That strategy would not be as high a priority.

Basic Strategy Design

Tactics for Change Leadership Strategies

This template lays out all of the leadership roles and strategies with space to identify the most effective tactics for each strategy. When filled out it provides a very clear and comprehensive picture of how the journey will be led. This template complements the other templates and it can also stand on its own.



Designing High Leverage Leadership Strategies

Preparing to Lead a Journey of Change

	Leadership Role	Strategy	*Leverage 1 / 2 / 3	Next Steps
ACT I	Visionary	#1 Build the Business Case		
		#2 Create the Vision		
		#3 Establish the Leadership Commitment		
	Architect	#4 Create the Organization Design		
		#5 Build the Journey Plan		
		#6 Create the Leadership Web		
ACT II	Catalyst	#7 Extend the Web		
		#8 Operationalize the Vision		
		#9 Prep the People & Organization		
	Guide	#10 Create a System for Communications		
		#11 Support People in Letting Go & Inbetweenity		
		#12 Establish a System of Accountability		
	Builder	#13 Maintain the Web		
		#14 Build Competency		
		#15 Support People in the Mastery Process		
ACT III	Integrator	#16 Manage the Ripple Effect		
		#17 Align the Organization		
		#18 Attune the People		

***Leverage**
 1 = High Leverage
 2 = Moderate Leverage
 3 = Low Leverage

Mid-Course Check on Leadership Strategy Success

Looking Ahead & Looking Back

	Leadership Role	Strategy	*Leverage 1 / 2 / 3	*Success A / B / C	Next Steps
ACT I	Visionary	#1 Build the Business Case			
		#2 Create the Vision			
		#3 Establish the Leadership Commitment			
	Architect	#4 Create the Organization Design			
		#5 Build the Journey Plan			
		#6 Create the Leadership Web			
ACT II	Catalyst	#7 Extend the Web			
		#8 Operationalize the Vision			
		#9 Prep the People & Organization			
	Guide	#10 Create a System for Communications			
		#11 Support People in Letting Go & Inbetweenity			
		#12 Establish a System of Accountability			
	Builder	#13 Maintain the Web			
		#14 Build Competency			
		#15 Support People in the Mastery Process			
ACT III	Integrator	#16 Manage the Ripple Effect			
		#17 Align the Organization			
		#18 Attune the People			

<p>*Leverage</p> <p>1 = High Leverage 2 = Moderate Leverage 3 = Low Leverage</p>	<p>*Success</p> <p>A = Highly Successful B = Moderately Successful C = Not Successful</p>
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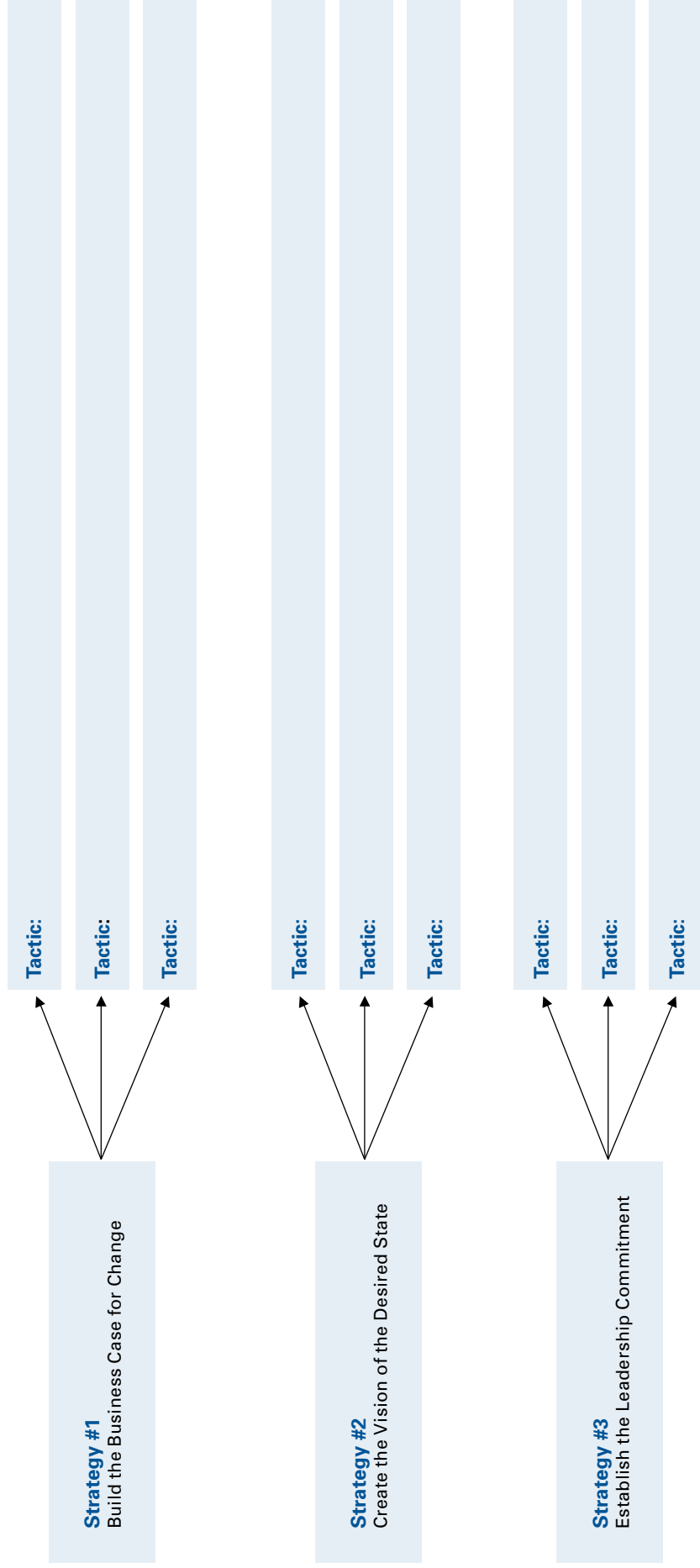
Tactics for Change Leadership Strategies

ACT I: Beginnings

The Visionary Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.



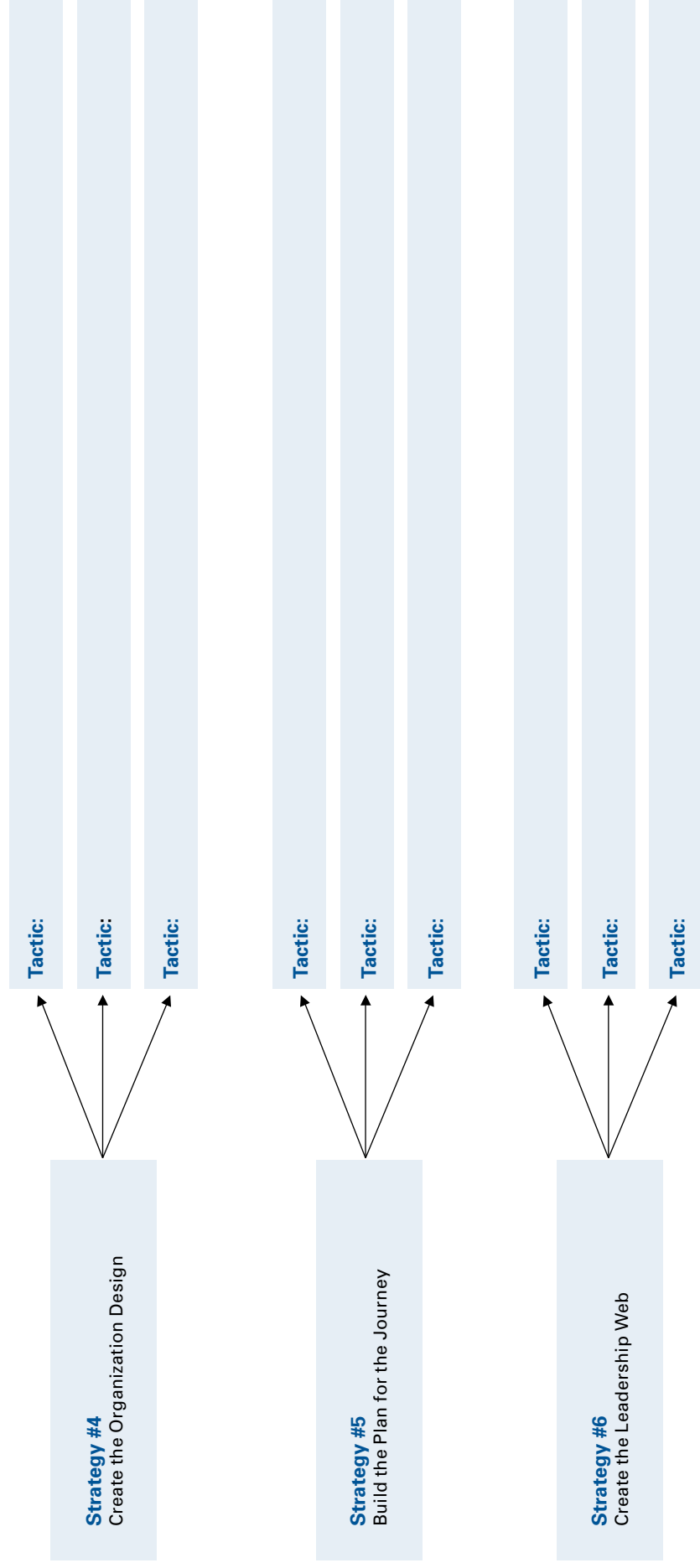
Tactics for Change Leadership Strategies

ACT I: Beginnings

The Architect Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.



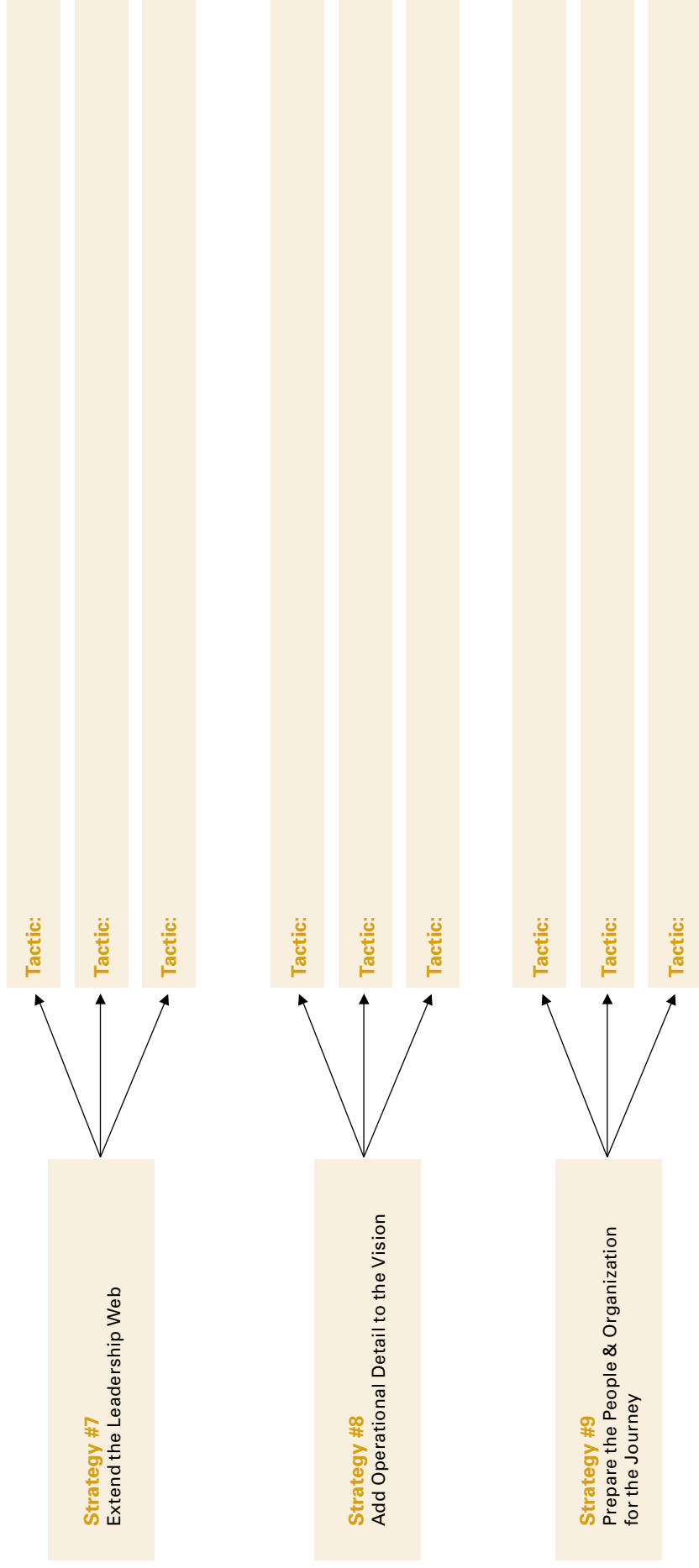
Tactics for Change Leadership Strategies

ACT II: On The Path

The Catalyst Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.



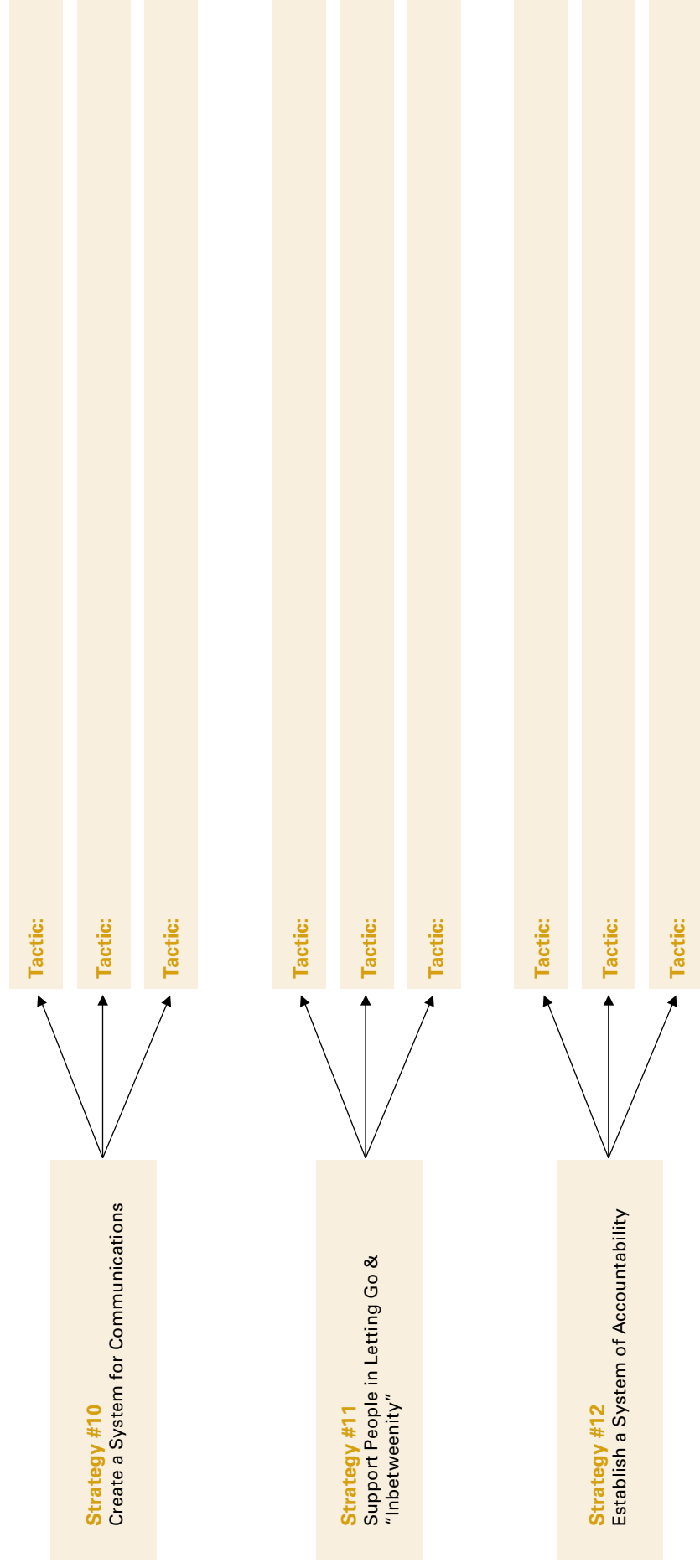
Tactics for Change Leadership Strategies

ACT II: On The Path

The Guide Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.



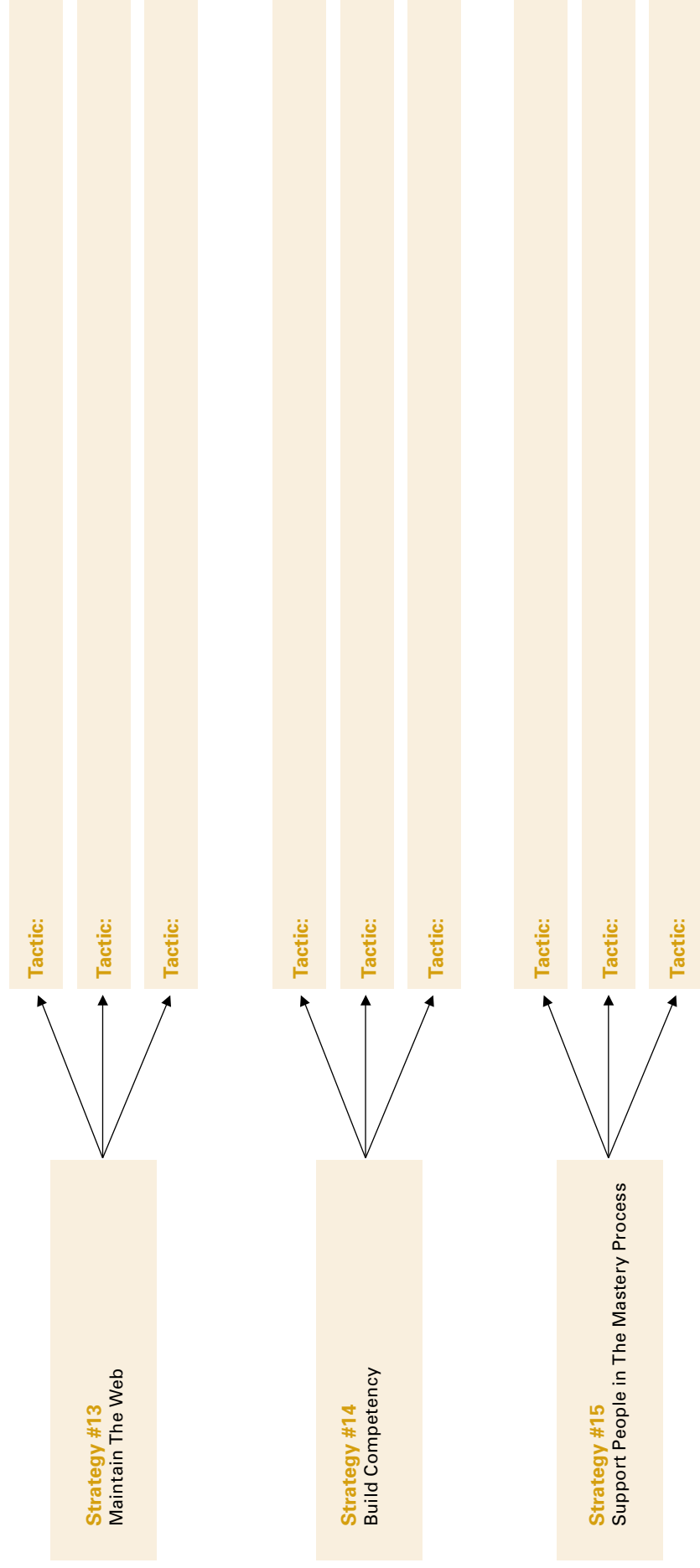
Tactics for Change Leadership Strategies

ACT II: On The Path

The Builder Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.



Tactics for Change Leadership Strategies

ACT III: Completion of the Journey

The Integrator Role

For Each Strategy:

Simply identify the three tactics that will provide the greatest benefit in pursuing that strategy. This format is useful in structuring the conversations of leadership groups – conversations that lead to the most effective actions. It also helps assure that leadership is aligned right at the beginning.

