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Leadership and Influence

Training Manual

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Module One: Getting Started
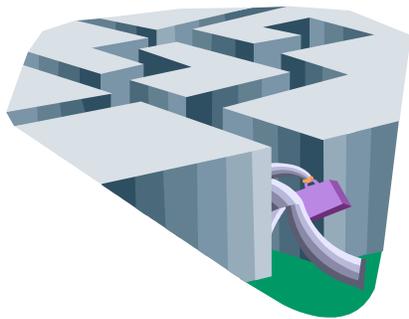
Welcome to the Leadership and Influence workshop! They say that leaders are born, not made. While it is true that some people are born leaders, some leaders are born in the midst of adversity. Often, simple people who have never had a leadership role will stand up and take the lead when a situation they care about requires it. A simple example is parenting. When a child arrives, many parents discover leadership abilities they never knew existed in order to guide and protect their offspring. There are countless war stories of simple GI's and sailors who rose to a challenge on their own in the heat of battle.

Clearly, leadership potential exists within each of us. That potential can be triggered by outside events, or it can be learned by exploring ourselves from within. This training takes the latter approach. Once you learn the techniques of true leadership, you will be able to build the confidence it takes to take the lead. The more experience you have acting as a genuine leader, the easier it will be for you. It is never easy to take the lead, as you will need to make decisions and face challenges, but it can become natural and rewarding.

Leadership is not telling others what to do. Leadership is inspiring others to do what needs to be done. Many people around the world who are in leadership positions are not leaders. Dictators call themselves leaders but they are not – they are tyrants. There have been many presidents of the United States, but few were real leaders. Genuine leaders take a stand and motivate others to join them in a noble purpose. One such leader was Abraham Lincoln, who ended slavery in the United States. Another was John F. Kennedy, who inspired a nation to go to the moon within a decade, and it did. General Patton had a completely different but no less effective leadership style. What is it that makes a leader, and what separates the good from the great? This workshop will explore different leadership theories and examine what makes a great leader.

Influence is subtle, yet incredibly powerful. You can order someone to do a task, but you cannot order them to do their best. It simply does not work and usually has the opposite effect. You can influence people to do their best by providing a strong, motivating example in addition to positive reinforcement. Leadership addresses tasks, while influence addresses attitudes and awareness. Influence is the soul of leadership.

Workshop Objectives
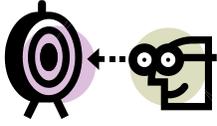
Research has consistently demonstrated that when clear goals are associated with learning that the learning occurs more easily and rapidly. With that in mind, let's review our goals for today.

By the end of this workshop, participants will be able to:

- Define "leadership"

- Explain the Great Man Theory

- Explain the Trait Theory

- Understand Transformational Leadership

- Understand the people you lead and how to adapt your leadership styles

- Explain leading by Directing

- Explain leading by Coaching

- Explain leading by Participating

- Explain leading by Delegating

- Kouzes and Posner

- Conduct a personal inventory

- Create an action plan

- Establish personal goals

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Action Plan

Module	Goal	Specific?	Measurable?	Achievable?	Relevant?	Timed?	Next Steps
One							
Two							
Three							
Four							
Five							
Six							
Seven							
Eight							
Nine							
Ten							
Eleven							
Twelve							

Evaluation Form

Workshop Title: Workshop Instructor:

_____   Date: _____   _____

Please rate the following items on a scale of one to ten, with one being abysmal, five being acceptable, and ten being perfect.										
WORKSHOP ROOM	1	2	3	4	5	6	7	8	9	10
Comments:										
WORKSHOP FACILITIES	1	2	3	4	5	6	7	8	9	10
Comments:										
INSTRUCTOR KNOWLEDGE	1	2	3	4	5	6	7	8	9	10
Comments:										
INTERACTIVITY OF WORKSHOP	1	2	3	4	5	6	7	8	9	10
Comments:										

Would you recommend this course to others? Why or why not?

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Pre-Assignment Review

The purpose of the Pre-Assignment is to get participants thinking about their current set of Leadership and Influence skills. You will also find a Pre-Assignment handout in the Activities folder.

List some skills or qualities you feel make up a good leader.

_____

_____

_____

_____

_____

The debate in regard to leaders being born or made has been around for a long time, what are your thoughts on it?

_____

_____

_____

_____

_____

Pre-Test

1.) Which of these statements about the evolution of leadership is true?

  a) As long as there have been leaders, it has been impossible to determine how and why they were successful
  b) Leadership itself has evolved, and our understanding of it has
  c) It is important to understand why very different leadership styles can be effective
  d) It is important to understand that not everyone has leadership potential within them

2.) What is the mark of a true leader?

  a) The position held
  b) The title held
  c) How many people need to be lead
  d) How many people are willing to follow them

3.) Which of these is the key to practical leadership development in the Hersey-Blanchard model?

  a) The attributes
  b) The styles
  c) The followers
  d) All of the above

4.) Who do communication experts consider it critical to tailor your message to?

  a) Stakeholders
  b) Community
  c) Target audience
  d) Sales team

5.) What is the name of the book published in 2002 and written by James Kouzes and Barry Posner?

  a) How Leadership Changed My Life and Will Change Yours, Too
  b) The Leadership Inventory.
  c) The Leadership Challenge
  d) The Delegating Leader: The Ultimate Goal

6.) What did James Kouzes and Barry Posner ask thousands of people to do?

    a) They challenged them to take on a leadership role for two months and document their experiences
    b) They asked them to rank a list of characteristics associated with leadership, including the seven top qualities that motivated them to follow willingly
    c) They told them to record themselves in leadership meetings and from there, they denoted what the seven top qualities of motivation were
    d) They asked them to follow a leadership inventory to rank their qualities and how they affected their day-to-day work-life

7.) Which of these statements is true about modeling the way as a leader?

    a) A true leader takes the blame, and then addresses how to correct the problems that arose
    b) The best followers are examples of what they want their leaders to be
    c) You can lead from the rear and send your troops out to take the heat and face the challenges
    d) If something does go wrong, a true leader blames his followers especially if in fact they failed

8.) Once you have chosen your role model, what should you do?

    a) Be willing to listen to criticism, but also consider the source
    b) Imagine your legacy
    c) Determine how you will accomplish your goals
    d) Study what qualities made them successful

9.) What is the key to true leadership?

    a) Hiding in your office
    b) Inspiring a shared vision among your staff
    c) Not seeing your staff regularly
    d) Disengaging yourself from your vision

10.) Before you can convey a vision, what must you do first?

    a) Choose a role model
    b) Develop your vision
    c) Imagine your legacy as a leader
    d) Write down your vision

11.) Which law governs most large groups?

    a) Law of comparative judgment

    b) Law of sociology

    c) Law of inertia

    d) Boyle's law

12.) What can be defined as an established model or structure?

    a) Paradigm

    b) Brainstorming

    c) Stereotype

    d) Paragon

13.) What is the ultimate goal of the Hersey-Blanchard situational Leadership model?

    a) To know that all members and all teams are created equal

    b) To develop your staff to the point where you can delegate tasks without a lot of oversight

    c) To be an effective leader by using a friendship style based on the individuals or groups they're leading

    d) To develop one style of leadership and use that style always

14.) What is good advice when enabling others to act?

    a) You must enable others to act by coming to you first for advice

    b) You cannot berate someone for trying hard but making an honest mistake.

    c) The goal of a leader is to empower others to work by micromanagement

    d) You should enable good habits by compensating for the bad habits of others or overlooking them

15.) What was one of the worst developments in the workplace?

    a) Leadership in the workplace

    b) The creation of email and the use of technology

    c) Deadlines and time management practices

    d) The creation of the term "Human Resources"

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16.) What was the term Human Resources formerly known as?

    a) Personnel Department
    b) Sales and Accounting Departments
    c) Accounts Bill-able
    d) Human Relationship Department

17.) As a leader, when do you get credit?

    a) All the time
    b) Only when your plan ultimately succeeds
    c) Whenever your followers succeed
    d) Whenever you save the company time and money

18.) Who in history was a master of the art of persuasion?

    a) Descartes
    b) Socrates
    c) Aristotle
    d) Plato

19.) What is a vision without specific, targeted goals?

    a) A committed, important legacy
    b) A plan for the future
    c) Just a wish or a hope
    d) A system of gaining followers

20.) What does the 'A' in the SMART acronym stand for?

    a) Accomplishment
    b) Attainable
    c) Achievable
    d) Applicable

Module Two: The Evolution of Leadership

As long as there have been leaders, there have been those who tried to determine how and why they were successful. Leadership itself has not evolved, but our understanding of it has. It is important to understand why very different leadership styles can be effective, why the same leadership techniques will not work in every situation, and which leadership style fits your personality best. Everyone has leadership potential within them, but understanding these concepts will help you maximize your leadership ability.

Defining Leadership

Simply speaking, "leadership" is defined as "the ability to lead." Unfortunately, this is not very helpful. A better definition comes from the BNET online Business Dictionary: *"The capacity to establish direction and to influence and align others toward a common goal, motivating and committing them to action and making them responsible for their performance."* Although this is more descriptive, it is not substantial. It does not tell us what leadership actually *is*, but rather what it *does*.

Characteristics of a Leader

The mark of a true leader is not a position or title held, but it is how many people are willing to follow them. Santa Clara University and the Tom Peters group outline the following leadership characteristics:

- Honest

- Competent

- Forward-looking

- Inspiring

- Intelligent

- Fair-minded

- Broad-minded

- Courageous

- Straightforward

- Imaginative

Leadership Principles

The United States Army offers 11 Leadership Principles:

- Be tactically and technically proficient

- Know yourself and seek self-improvement

- Know your soldiers and look out for their welfare

- Keep your soldiers informed

- Set the example

- Ensure the task is understood, supervised and accomplished

- Train your soldiers as a team

- Make sound and timely decisions

- Develop a sense of responsibility in your subordinates

- Employ your unit in accordance with its capabilities

- Seek responsibility and take responsibility for your actions

You will notice that none of the above actually tells you *how to lead* in a practical manner. They don't address what to do or say in any given situation. That is because there is no real formula to being a leader. Leadership must come from within and it is based on your personality. In this training, you will learn how to develop your innate leadership abilities and build the confidence required in being a true leader.

A Brief History of Leadership

Historical Leaders

Throughout the centuries, there have been leaders. We are social animals who bond together, but we look for order against the chaos of life. We look to be organized to accomplish tasks as a society that we cannot perform individually. As a result, someone inevitably ends up in charge.
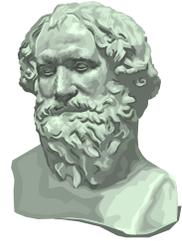
Leaders in the past have generally belonged to one of three categories: Political, Military or Religious.

- Political: Around 1790 B.C., Babylonian ruler Hammurabi created the codified laws, which unified his empire in what was seen as a fair order as all people were subject to the same rules.

- Military: Sun Tzu was a military general in China from 500 B.C. He wrote the Art of War, and although he was a great military leader, his book is actually about how to *not* use armies except as a last resort, focusing more on wise political policies and strategies to prevent war.

- Religious: It may be said that religious leaders have had the greatest impact on their societies, with results that last for centuries.

Modern Leaders

With the rise of the industrial revolution, a new kind of leader emerged: Economic. The so-called Captains of Industry found they could build an empire based on modern technology instead of swords. Oil Barons, railroad magnates, and factory owners built large fortunes without the benefit of armies; it was often at the expense of the people they employed. This gave rise to Union leaders and various movements designed to promote justice where abuses were perceived to exist.

The Industrial Revolution also increased the number of Scientific Leaders, as scientists now had easy access to a wide range of new materials for their work. Psychiatry and Psychology came into prominence with studies on the workplace, in regard to improving productivity and the effect on the workforce.

Studies have shown consistently that workers are more productive when they are in a "positive work environment." The attitude and influence of the boss is a major factor in this productivity. If employees feel they are listened to, respected, and treated fairly, they are happier in their work and perform better than those who feel they are disrespected and unappreciated. Which kind of work environment would *you* prefer?

Three Theories of Leadership

The Great Man Theory

The Great Man Theory was abandoned in favor of the theories of behavioral science. It's easy to be inspired by stories of great men and women who did great things in their lives. Alexander the Great conquered the known world. Genghis Khan then ravaged most of it. Abraham Lincoln freed the slaves. Harriet Tubman saved hundreds from slavery in the Underground Railroad. Mother Theresa aided and comforted thousands in Calcutta who were abandoned by society. Theory goes that these people did great things because they were simply great people determined by fate and fulfilling their destiny.

The Trait Theory

It has often been said, *"Great leaders are born, not made."* The *Trait Theory* takes this saying literally. If you have the ability to lead, you were born with it, with no way to learning those skills. This theory expands on the Great Man Theory by defining what makes great leaders "great."

Today, we recognize that true leadership seems to come from a combination of both theories – and more. As we have seen, there are wide varieties of leadership qualities. Everyone has some ability in at least one or more of these areas. This means that under the right circumstances, anyone can rise to a leadership role and be successful based on the leadership style that best matches their personality, if they know how to use that ability to properly address the situation at hand. Other leadership skills can indeed be learned, developed, and mastered.

Transformational Leadership

In 1978, James MacGregor Burns introduced the idea of transformational leadership as he researched political leaders. Burns theorized that "transformational leadership" is actually a process where leaders interact with their followers and inspire each other to advance together. His characteristics and behaviors demonstrated the differences between "management" and "leadership." People and organizations are transformed due to the leadership style and abilities of the leader, who is able to convey a vision and guide the transformation.

Bernard M. Bass, in 1985, added to Burns' transformational leadership theory by shifting the focus to the followers. It is not the individual traits and vision of the leader that matter as much as it is their ability to influence the feelings, attitudes, and commitment of their followers. If people feel they can trust a leader (or better yet, if they admire a leader who can stimulate a sense of loyalty and respect) they will go beyond what was originally expected of them, do so happily. As a result, productivity and unity increase. The followers are transformed by a charismatic, motivational leader.

Summary

Through all of the studies, we have seen that there are a variety of attributes and abilities associated with leadership, and these vary from leader to leader. Some leaders are great orators, others great writers. Some leaders are very quiet, but the force of their logic or passion wins the day. The difference between a good leader and a great leader is partly the number of leadership skills they have developed. The other part is their ability to apply those skills properly to those who would follow. We will address these issues in the next section.

Practical Illustration

Julie and Mindy had worked side by side for over five years. They chatted between projects and took lunch breaks together. When the company restructured, Julie was given a management position and Mindy became her subordinate. Mindy felt that it was unfair that she now had to take instructions from Julie and her negative attitude caused the department to lose productivity. Julie understood that it would take time to earn back Mindy's respect. She kept a positive attitude when working with Mindy and always kept Mindy informed of things that were relevant to Mindy's job. She assigned tasks to Mindy that she knew Mindy could accomplish and she gave appropriate feedback when work was delivered. Julie took responsibility for her decisions and didn't blame others when things went wrong. Over time, she gained Mindy's respect and the department's productivity soared.

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Module Two: Review Questions

1.) Which of these statements about the evolution of leadership is true?

   a) As long as there have been leaders, it has been impossible to determine how and why they were successful
   b) Leadership itself has evolved, and our understanding of it has
   c) It is important to understand why very different leadership styles can be effective
   d) It is important to understand that not everyone has leadership potential within them

2.) What is the mark of a true leader?

   a) The position held
   b) The title held
   c) How many people need to be lead
   d) How many people are willing to follow them

3.) Which of these is not a characteristic of a leader outlined by the Santa Clara University and the Tom Peters group?

   a) Honest
   b) Imaginative
   c) Straightforward
   d) Closed-minded

4.) Which of these is a leadership principle of the United States Army?

   a) Ensure the task is understood, supervised, and accomplished
   b) Seek to improve others, not yourself
   c) Keep your superiors informed
   d) Seek responsibility and take responsibility for others' actions

5.) Why do the United States Army leadership principles not address what to do or say in any given situation?

   a) There would be too many variables. The list would be too long and complicated
   b) Because there is a real formula for being a leader that is taught at higher ranks
   c) Leadership cannot be taught. It can only be learned through personal experience
   d) Leadership must come from within and it is based on your personality

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6.) Which of these categories have leaders typically belonged to in the past?

   a) Police
   b) Religion
   c) Family
   d) School system

7.) Which of these statements is not true about the military leader, Sun Tzu?

   a) He wrote the Art of War
   b) His book is about how to use armies by any means necessary
   c) He was a great military leader
   d) His book focuses more on wise political policies and strategies to prevent war

8.) With the rise of the Industrial Revolution, what new kind of leader emerged?

   a) Economic
   b) Military
   c) Political
   d) Family

9.) Which theory takes the phrase "Great men are born, not made" literally?

   a) The Great Man Theory
   b) The Generational Theory
   c) The Trait Theory
   d) The Leadership Principle Theory

10.) Which of these is the difference between a good leader and a great leader?

   a) The amount of political clout they have
   b) Writing ability
   c) Military tactical thinking
   d) The number of leadership skills they have developed

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Module Three: Situational Leadership

Now we get to the nuts and bolts of leadership. The definitive leadership style research comes from Paul Hersey and Kenneth Blanchard, which they expressed in their Situational Leadership Model. The Hersey-Blanchard model addresses the key to practical leadership development: the attributes and styles of the *followers*.

Not everyone is on the same intellectual, maturity, compliance, or motivational level. Different people are motivated by different things, and this must be taken into account if one is to be a great leader. Communications experts consider it critical to tailor your message to your "target audience." It is the followers that you want to motivate and influence and you cannot do that if you don't know who you are trying to motivate or influence.

The Situational Leadership model addresses four types of leadership styles, based on the follower:

- Telling

- Selling

- Participating

- Delegating

The goal is to develop followers to the Delegating level as seen below:

Leadership Styles in the Hersey-Blanchard
Situational Leadership Model
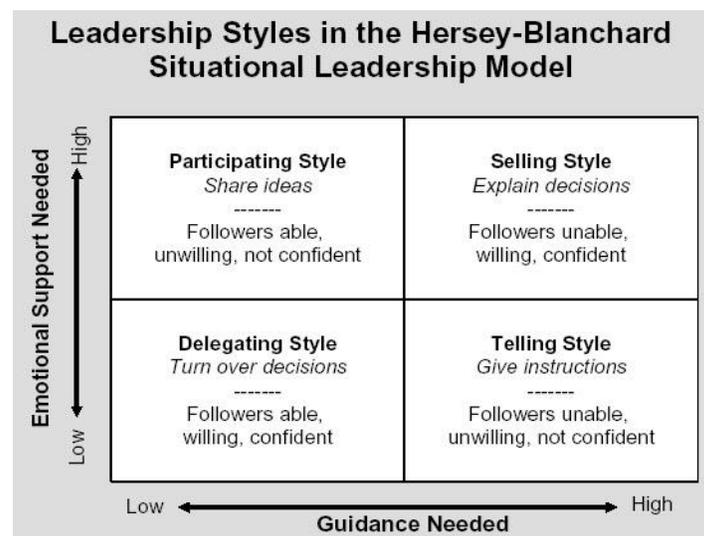
Situational Leadership: Telling

Telling is the lowest level of leadership style. Most new employees require direct instructions, so this is called the "Telling" or "Directing" style. The follower, or employee, is characterized by low competence and high commitment, being unable to comply, with possible feelings of insecurity.

The leader must focus highly on tasks, rather than a relationship with the employee, as a relationship does not yet exist.

When an employee can't do the job because they are unknowledgeable, the leader must spend much more time working with the employee, offering clear instructions and regular follow up. The leader must be encouraging and motivational, offering praise for positive results and correction for less than positive results. The idea is to motivate the employee to rise to the next level of ability.

This is a very leader-driven stage.

Situational Leadership: Selling

Selling addresses the employee who has developed some competence with an improved commitment. The employee is not convinced yet, but is open to becoming cooperative and motivated.

The leader must still focus highly on tasks and this still requires much of the leader's time, but the focus now also includes developing a relationship with the employee. Build upon the trust that has begun to develop and the encouragement that has been demonstrated. The leader must spend more time listening and offering advice, scheduling the employee for additional training if the situation requires it.

The goal is to engage the employee so they can develop to the next level. There is less "telling" and more "suggesting" which leads to more encouragement, acting as a coach. It is recognition that they have progressed and motivates them to progress even further.

This is a very leader-driven stage.

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Situational Leadership: Participating

Participating addresses the employee who is now competent at the job, but remains somewhat inconsistent and is not yet fully committed. The employee may be uncooperative or performing as little work as possible, despite their competence with the tasks.

The leader must participate with and support their employee. The leader no longer needs to give detailed instructions and follow up as often, but does need to continue working with the employee to ensure the work is being done at the level required.

The employee is now highly competent, but is not yet convinced of their ability or not fully committed to do their best and excel. The leader must now focus less on the tasks assigned and more on the relationship between the employee, the leader, and the group.

This is a very follower-driven, relationship-focused stage.

Situational Leadership: Delegating

Delegating is the ultimate goal: an employee who feels fully empowered and competent enough to take the ball and run with it, with minimal supervision. The employee is highly competent, highly committed, motivated, and empowered.

The leader can now delegate tasks to the employee and observe with minimal follow up, knowing that acceptable or even excellent results will be achieved. There is a low focus on tasks and a low focus on relationships. There is no need to compliment the employee on every task, although continued praise for outstanding performance must be given as appropriate.

This is a very follower-driven stage.

Practical Illustration

Jackie became frustrated with her staff members. She said to her manager, "I feel like I'm putting in 120%. I'm exhausted!"

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Paulette frowned a little. "Whenever I hear that, I feel that perhaps you are working so hard because you are doing the jobs of other staff members."

Jackie admitted, "I give a lot of detailed information and follow up with my employees very frequently, just to make sure everything goes perfectly."

Paulette was honest with her. "While it's great that you're so attentive, perhaps your staff is feeling micromanaged. Even if you're afraid that something might go awry, if you step back and let them carry out tasks on their own, you may ultimately see better results."

Jackie took Paulette's advice. When she trusted her employees, things went much more smoothly.

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Module Three: Review Questions

1.) Which of these is the key to practical leadership development in the Hersey-Blanchard model?

   a) The attributes
   b) The styles
   c) The followers
   d) All of the above

2.) Who do communication experts consider it critical to tailor your message to?

   a) Stakeholders
   b) Community
   c) Target audience
   d) Sales team

3.) Which model addresses four types of leadership styles?

   a) The Confident Model
   b) The Situational Leadership Model
   c) The Motivational Leader Model
   d) The Authoritarian Leadership Model

4.) In the Situational Leadership Model, to which level do employees need to be developed?

   a) The Delegating Level
   b) The Selling Level
   c) The Participating Level
   d) The Telling Level

5.) What is the lowest level of leadership style?

   a) The Delegating Level
   b) The Selling Level
   c) The Participating Level
   d) The Telling Level

6.) What are characteristics of the employee of a Telling Leader?

a) The employee has low competence and high commitment, being unable to comply, with possible feelings of insecurity
b) The employee may be uncooperative or performing as little work as possible, despite their competence with the tasks
c) The employee is not convinced yet, but is open to becoming cooperative and motivated
d) The employee is highly competent, highly committed, motivated, and empowered

7.) Which of these statements is true about a Selling Leader?

a) The employee of a selling leader is convinced and is open to becoming cooperative and motivated
b) The leader must still focus highly on tasks and this still requires much of the leader's time, but the focus now also includes developing a relationship with the employee
c) The employee must spend more time listening and offering advice, scheduling the leader for additional training if the situation requires it
d) The goal is to engage the leader so they can develop to the next level

8.) What does a participating leader need to focus more on?

a) On the tasks assigned
b) On getting the "buy in" of the employee from the start
c) On the relationship between the employee, the leader, and the group.
d) On building the employee into a leader

9.) What is the ultimate goal of the delegating leader?

a) Complementing the employee on every task, as continued praise for outstanding performance must be given
b) An employee who feels fully empowered and competent enough to take the ball and run with it, with minimal supervision.
c) Delegating tasks to the employee with utmost supervision, for liability reasons
d) An employee who requires high levels of supervision and task assignment

10.) Which of these are the follower-driven stages?

a) Delegating and Participating
b) Selling and Telling
c) Telling and Participating
d) Delegating and Selling

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Module Four: A Personal Inventory

In 2002, Jossey Bass published a book by James Kouzes and Barry Posner called *The Leadership Challenge (Copyright © 2000-2012 by John Wiley & Sons Canada, Ltd, or related companies. All rights reserved.)* Building upon the Hersey-Blanchard model and other transformational leadership models, they went to the heart of what skills are required by the leader to stimulate such a transformation. What abilities are able to influence followers and bring them to accept the leader's vision as their own?

An Introduction to Kouzes and Posner

James Kouzes and Barry Posner asked thousands of people to rank a list of characteristics associated with leadership, including the seven top qualities that motivated them to follow willingly. They gave this survey to over 75,000 people over a 20-year period.

In their book, *The Leadership Challenge (Copyright © 2000-2012 by John Wiley & Sons Canada, Ltd, or related companies. All rights reserved.)* the authors identified five abilities that were crucial to successful leadership:

- **Model the Way**: You must lead by example. You can't come into work 10 minutes late every day if you want your employees to arrive on time.

- **Inspire a Shared Vision**: If you capture the imagination, you will inspire creative thought and increase loyalty. The vision doesn't need to be grandiose, but it needs to be communicated effectively for others to adopt it as one of their own.

- **Challenge the Process**: Don't continue doing something just because "We've always done it that way." Situations change, and sometimes a policy or procedure never worked well in the first place. Think outside the box.

- **Enable Others to Act**: Truly empower people to act on their own within their level of authority. The famed Ritz-Carlton hotel empowers every employee at all levels by allowing them to spend up to $2,000, making any single guest satisfied.

- **Encourage the Heart**: A positive attitude is infectious. If the leader appears passionate or excited about the vision, others will catch the enthusiasm as well.

A Personal Inventory

The results of the Kouzes/Posner study, with the most important quality at the top:

• Honest	• Cooperative
• Forward-looking	• Determined
• Competent	• Imaginative
• Inspiring	• Ambitious
• Intelligent	• Courageous
• Fair-minded	• Caring
• Broad-minded	• Mature
• Supportive	• Loyal
• Straightforward	• Self-controlled
• Dependable	• Independent

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Creating an Action Plan

Now that you understand the various concepts, it's time to plan how to put them into action by incorporating them into your life.

Set Leadership Goals: In leadership, as in life, you will never come to the end of your learning, but you want to rank in priority those qualities you want to develop.

Address the Goals: Determine how you will accomplish your goals. Do you feel you need to learn more about teamwork so you can better lead a team? Join a team sport. Do you want to communicate better? Take a creative writing class or join Toastmasters and get some public speaking experience. Toastmasters are also great if you are shy and want to feel more comfortable in social situations.

Seek Inspiration: Learn about a variety of leaders, including their approach to dealing with challenges. Read books and conduct research on the internet or at libraries.

Choose a Role Model: Based on your research, choose a role model that fits your personality. You might choose a dynamic leader like Teddy Roosevelt, or an intellectual leader like Albert Schweitzer or Albert Einstein. Read several biographies and find videos of their life.

Seek Experience: Take a leadership role on a social group or club. Gain experience working with people on many levels.

Create a Personal Mission Statement: Imagine your legacy. How do you want to be remembered? What do you want people to think of you? What type of leader are you determined to be? Write a statement that defines who you will become.

Practical Illustration

Yolanda wasn't sure why the morale of her employees was down. She'd modeled the way. She had communicated their shared vision. Yolanda had made changes and fostered a workplace where ingenuity was rewarded. She definitely worked on enabling others to act, in order to have her employees exert their authority. It was only when she went back to her training manual on Leadership that she realized what she'd been missing.

Yolanda entered into the meeting room with a new, more positive attitude. She started by showing enthusiasm and passion for their tasks. She made sure to smile during the meeting, and while of course she had to be an authority figure, when it was realistic, she found ways to genuinely compliment others to show them that their work was appreciated. It was clear that the manual was right. 'A positive attitude is infectious.'

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Module Four: Review Questions

1.) What is the name of the book published in 2002 and written by James Kouzes and Barry Posner?

   a) How Leadership Changed My Life and Will Change Yours, Too
   b) The Leadership Inventory.
   c) The Leadership Challenge
   d) The Delegating Leader: The Ultimate Goal

2.) What did James Kouzes and Barry Posner ask thousands of people to do?

   a) They challenged them to take on a leadership role for two months and document their experiences
   b) They asked them to rank a list of characteristics associated with leadership, including the seven top qualities that motivated them to follow willingly
   c) They told them to record themselves in leadership meetings and from there, they denoted what the seven top qualities of motivation were
   d) They asked them to follow a leadership inventory to rank their qualities and how they affected their day-to-day work-life

3.) Which of these is one of Kouzes' and Posner's abilities that are crucial to successful leadership?

   a) Enable Others to Act
   b) Lead the way
   c) Enforce the process
   d) Encourage the imagination

4.) What does Kouzes' and Posner's ability "Model the Way" mean?

   a) If you capture the imagination, you will inspire creative thought and increase loyalty
   b) You must lead by example
   c) Truly empower people to act on their own within their level of authority
   d) A positive attitude is infectious

5.) Which ability means "Think outside the box."?

    a) Lead the Way
    b) Challenge the Process
    c) Enable Others to Act
    d) Inspire a Shared Vision

6.) Which of these statements is true of "Inspiring a Shared Vision"?

    a) You can't come into work 10 minutes late every day if you want your employees to arrive on time
    b) Situations change, and sometimes a policy or procedure never worked well in the first place
    c) If the leader appears passionate or excited about the vision, others will catch the enthusiasm as well
    d) If you capture the imagination, you will inspire creative thought and increase loyalty

7.) In the results of the Kouzes/Posner study, what was reported as the most important quality in a leader?

    a) Independent
    b) Supportive
    c) Honest
    d) Determined

8.) Which of these is the first step to creating an action plan?

    a) Seek experience
    b) Set leadership goals
    c) Choose a role model
    d) Create a personal mission statement

9.) Which of these is a way to seek inspiration?

    a) Imagining your legacy
    b) Choose a role model that fits your personality
    c) Read books and conduct research on the internet or at libraries.
    d) Determine how you will accomplish your goals

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10.) Which of these is not a question you would ask yourself before preparing a mission statement?

   a) Do you want to communicate better?
   b) How do you want to be remembered?
   c) What do you want people to think of you?
   d) What type of leader you determined to be?

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Some look at things that are, and ask why. I dream of things that never were and ask why not?

George Bernard Shaw

Module Five: Modeling the Way

Remember that the best leaders are examples of what they want their followers to be. George Washington rode into battle with his troops. You cannot lead from the rear, and sending your troops out to take the heat and face the challenges while you remain in an ivory tower will eliminate any possibility of respect.

By definition, a leader is in the *lead*, right up front, ready to take the heat if something goes wrong. If something does go wrong, a true leader never blames his followers even if in fact they failed. A true leader takes the blame, and then addresses how to correct the problems that arose.

Determining Your Way

Once you have chosen your role model, study what qualities made them successful. Learn about what challenges they faced and how the challenges were met. Learn about the ideas and philosophies that drove them and made them successful. Study again the Hersey- Blanchard model and see how different situations called for different styles of leadership.

Since there is no leader in history who has not had failures, pay particular attention to how your hero deals with adversity. George Washington nearly lost the American Revolution through major hesitations in leadership and in fact, he lost New York to the British general William Howe, but he learned from his mistakes and the rest, as they say, is history.

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Being an Inspirational Role Model

Leadership is neither for the timid nor for the arrogant. Confidence is often resented or misinterpreted for arrogance. People who lack self-confidence often feel intimidated by a true leader. This should never hold you back. If you have honesty, integrity and deal with everyone fairly, then others will see that. Be willing to listen to criticism, but also consider the source. If you are too afraid of what others might say about you, or you ignore legitimate complaints insisting on respect solely because of your position, you will lose the respect and cooperation of your supporters and peers.

President Theodore Roosevelt said it best:

"It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood, who strives valiantly; who errs and comes short again and again; because there is not effort without error and shortcomings; but who does actually strive to do the deed; who knows the great enthusiasm, the great devotion, who spends himself in a worthy cause, who at the best knows in the end the triumph of high achievement and who at the worst, if he fails, at least he fails while daring greatly. So that his place shall never be with those cold and timid souls who know neither victory nor defeat."

Influencing Others' Perspectives

You may have heard that perception is reality. You must always present an honest, caring, dedicated attitude to inspire others. To inspire loyalty, you must have a track record of honesty and fairness. If any of your employees do feel they have been wronged, for whatever reason, you need to address the issue immediately. People talk, and a problem ignored is a problem that grows.

Believe it or not, the most powerful influence you can have, is often not trying to influence someone. When people believe you are open to their suggestions and believe they have been heard, they will work harder even if they disagree with the methods or goals. That is the power of listening. Simply listening to others makes them feel empowered, even if you don't accept their suggestions. If an employee feels there's no point talking to you, they won't; they will disengage from your vision and follow your directions begrudgingly.

If you are seen as going the extra mile, your employees are more likely to go the extra mile. If you hide in your office and people never see you, you will be perceived as out of the loop, uninformed, uninterested, and therefore unworthy to lead. Many a successful corporate executive makes it a point to be seen by their employees every day. If an employee is to be commended for something, it is done

publicly, often right in the middle of their workplace while they are surrounded by their coworkers. That sends a powerful message to everyone.

Practical Illustration

Justin had a difficult time being a leader lately. Things had just felt monotonous and stale, and he was wondering why he'd ever wanted to be a leader in the first place. He sat down to talk with the leader of another group of employees to refocus.

Amy listened to Justin, and then she asked him, "In the past, when you dreamed about becoming a leader, what other leaders inspired you?"

Justin thought about this for a moment, and then he said, "I've always been inspired by Martin Luther King, Jr. He was powerful and peaceful at the same time. He was courageous, and he stood up for his beliefs."

Amy smiled. "How can you use his example to inspire and influence your employees?"

This got Justin thinking, and before he knew it, he had a list of ideas of how he could reinvigorate his staff and himself.

Module Five: Review Questions

1.) Which of these statements is true about modeling the way as a leader?

   a) A true leader takes the blame, and then addresses how to correct the problems that arose
   b) The best followers are examples of what they want their leaders to be
   c) You can lead from the rear and send your troops out to take the heat and face the challenges
   d) If something does go wrong, a true leader blames his followers especially if in fact they failed

2.) Once you have chosen your role model, what should you do?

   a) Be willing to listen to criticism, but also consider the source
   b) Imagine your legacy
   c) Determine how you will accomplish your goals
   d) Study what qualities made them successful

3.) Why should you pay particular attention to how your hero deals with adversity?

   a) Because you can learn about the ideas and philosophies that drove them and made them successful
   b) Because there is no leader in history who has not had failures
   c) Since that is the best way to see how different situations called for different styles of leadership
   d) Since your own staff will be looking for the mistakes that you might make

4.) Who is leadership not for?

   a) The self-confident and self-assured
   b) The bold and the self-starter
   c) The timid or the arrogant
   d) Those who have honesty and integrity

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5.) Which of these is not helpful advice for being an inspirational role model?

   a) Be an arrogant leader. People will see it as being powerful
   b) Be willing to listen to criticism, but also consider the source
   c) Don't be too afraid of what others might say about you
   d) People who lack self-confidence often feel intimidated by a true leader. Don't let these types of people hold you back

6.) Who said, ""It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood, who strives valiantly"?

   a) George Washington
   b) Theodore Roosevelt
   c) William Howe
   d) Hershey-Blanchard

7.) What type of attitude must you always have to inspire others?

   a) Autonomous, demanding, arrogant
   b) Loud, boisterous, flighty
   c) Quiet, timid, soft-spoken.
   d) Honest, caring, dedicated

8.) If any of your employees do feel they have been wronged, what do you need to do?

   a) Ignore the problem
   b) Hold back, as acting quickly will be misinterpreted as arrogance
   c) Seek counsel from your mentors
   d) Address the issue immediately

9.) Believe it or not, what's the best influence you can have?

   a) Using writing and speeches to persuade others
   b) A large company of followers
   c) Not trying to influence someone
   d) Not leading someone

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10.) What makes others feel empowered?

    a) Listening to them
    b) Having a leader in charge
    c) Being given a compliment in private
    d) Disengaging yourself from your staff

Module Six: Inspiring a Shared Vision

The key to true leadership is to inspire a shared vision among your followers. Before you can convey a vision, however, you have to develop it. You must be clear in your vision, live it before others can see it, and model it from your behavior.

Choosing Your Vision

What do you want to accomplish, and what do you need to do to get there? Determine attainable goals and focus on them. King Arthur sought the Holy Grail. Lewis and Clark mapped much of the United States. NASA took us to the moon. What is your vision?

Your vision will provide a sense of direction for you and your followers. In the military, focus is on "the mission." Whatever the mission is, everyone is dedicated to it. Let your vision be like a lighthouse on a hill, guiding ships to safety and warning them away from the rocks.

Communicating Your Vision

Communication is more than just the words you say or the memos you write. Remember, actions speak louder than words. Take every opportunity to communicate your vision in words and deeds. One of the best ways to communicate a vision is to sum it up in a simple catch phrase.

Post your slogan, catch phrase and mission statement in prominent locations. When you send out emails, list it in quotes below your signature block. Hold meetings occasionally or hand out "Visionary Awards" to people who exemplify your vision. Above all, lead by example.

Identifying the Benefit for Others

Answer the question, "What's in it for me?" as if you were one of your own employees. The answer might not always be obvious. Certainly, performance bonuses and awards work, but most employees enjoy being part of a larger, successful organization. Everyone loves a winner. When the home team wins at the stadium, you would think the fans in the stand were the players by the way they share in the victory and excitement.

We are social creatures who like to feel like we belong. We crave acceptance. If you can get your employees to accept your vision as their own, and excite them about being part of it, they will often excel beyond what you (or they) thought possible. Be sure to reward loyalty and performance above and beyond the call of duty.

Practical Illustration

Bruce spoke passionately about his company's vision. He believed in their product, and he wanted his employees to feel the same enthusiasm. He'd been wracking his brain for a way to instill this in his employees. One day, the answer came to him.

He got nice paper and printed out certificates. He also bought small prizes, like candies, brightly colored office supplies, and lottery tickets. He waited until Sean, one of his newer employees, used his own enthusiasm and passion to secure a new client.

Bruce announced to the office. "I'd just like to take a moment to congratulate Sean on his new client. He used his enthusiasm for our product to sign them on. I'd like to give him this Visionary Award for exemplifying our vision."

Bruce continued to give out these awards, inspiring his employees to become excited about their vision.

Module Six: Review Questions

1.) What is the key to true leadership?

   a) Hiding in your office
   b) Inspiring a shared vision among your staff
   c) Not seeing your staff regularly
   d) Disengaging yourself from your vision

2.) Before you can convey a vision, what must you do first?

   a) Choose a role model
   b) Develop your vision
   c) Imagine your legacy as a leader
   d) Write down your vision

3.) What is a question you can ask yourself to help choose your vision?

   a) What's in it for me?
   b) Why are things the way they are?
   c) What do you want to accomplish, and what do you need to do to get there?
   d) What is most important in my life?

4.) Which of these is an example of a vision that had an attainable goal?

   a) King Arthur sought the Holy Grail
   b) Lewis and Clark mapped much of the United States
   c) NASA took us to the moon
   d) All of the above

5.) What will your vision provide for you and your employees?

   a) A monetary source
   b) A sense of accomplishment
   c) A series of ideas
   d) A sense of direction

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6.) Which of these analogies best describes what a vision should be?

   a) Like the tortoise and the hare, be like the tortoise. Slow and steady
   b) Be like a lighthouse on a hill, guiding ships to safety and warning them away from the rocks
   c) Be like a car, able to accomplish things at incredible speed
   d) Like the military, have your employees sign up and commit to a decided upon time of service

7.) What should you take every opportunity to do?

   a) Communicate your vision in words and deeds
   b) Gain more followers
   c) Re-assess the loyalty of your employees
   d) Have your words speak louder than your actions

8.) What is one of the best ways to communicate a vision?

   a) Verbal repetition
   b) Sum the vision up in a simple catch phrase.
   c) Posting flyers with lengthy paragraphs explaining your vision
   d) Have your employees recite the vision daily

9.) What do most employees enjoy?

   a) Constructive criticism given at regular intervals
   b) Hard work and little involvement from you in working towards the vision
   c) Being part of a larger, successful organization
   d) Giving their loyalty to you

10.) If you can get your employees to accept your vision as their own, and excite them about being part of it, what will they most likely do?

   a) Excel beyond what you (or they) thought possible
   b) Want performance bonuses and awards for validation
   c) Ask the question "What in it for me?"
   d) Crave acceptance

Module Seven: Challenging the Process

Far too often, we cling to what is familiar, even if what we cling to is known to be inadequate. Most large groups are governed by the law of inertia: if it takes effort to change something, nothing will change. As a leader, you must search out opportunities to change, grow, innovate, and improve.

There is no reward without risk however, so you must be willing to experiment, take risks, and learn from any mistakes. Ask questions, even if you fear the answers. Start with the question, "Why?" Why are things the way they are? Why do we do things the way we do?

Think Outside the Box

A *paradigm* is an established model or structure. Sometimes they work quite well, but often they are inadequate or even counterproductive. Sometimes it is necessary to "think outside the box" and break the paradigm. Don't be afraid to ask the question "Why?" Ask questions of your employees, customers, former leaders. Answers and ideas can be found in the least likely places. Often the lowest ranking persons in an organization can tell you exactly what is wrong because they see it daily from their vantage points.

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Developing Your Inner Innovator

Innovation is more than just improvement on a process or procedure; it is a total redirection or restructuring based upon stated goals and research. While it can be helpful to adapt an outdated procedure or task to today's standards, often the procedure itself is the problem, not the manner in which it is implemented. Innovators reverse engineer policies and procedures based on the new vision and goals, working from the target backwards, rather than from the status quo looking forward.

To be sure, not all innovative strategies will be feasible or cost effective. Requiring an entirely new computerized network and infrastructure, for example, may cost hundreds of thousands of dollars and produce little improved efficiency over the old one. However, if you don't start thinking "outside the box," you will miss many valuable solutions that can and will work.

Note that change should never be made simply for the sake of change. Change can be exciting, but it can also be unnerving and difficult for employees. Constant change causes frustration. Moreover, if you seem to change too many things too often, you will lose respect, as your employees perceive you don't really know what you are doing, so be sure to plan your innovations carefully. There should be solid evidence that a new way of doing things is likely to work before you invest money and everyone's time.

Keep focused on the goals and be willing to break the rules if they need to be broken. Just make sure they really need to be broken and you don't break something that needs to keep working! With proper research and planning, you can dare to be bold!

Seeing Room for Improvement

A strong vision does not lend itself to mediocrity. A drive to excellence always seeks improvement. If you accept 95% efficiency as a goal, the efficiency will inevitably slip to 90%. If that's considered "good enough," it will become hard to keep it above 85% and so on. A vision is a goal that is strived to achieve.

Goals must not be unrealistic or unattainable, or people will simply give up trying altogether, becoming dispirited and demoralized in the process. If 95% of people fail to meet a standard, then that standard is likely too high and must be changed. On the other hand, the bar must not be set so low that little or no effort is required to meet it.

Based on your vision, set high goals that are attainable but with some degree of difficulty, and reward those who meet the goals. If a large number of people are meeting the goal, raise the target. If only a very few are meeting it, lower it somewhat.

Investigate any potential bottlenecks that might be stifling progress and resolve them. Talk to your staff about possible solutions. The people who actually do the work are far more likely to be able to tell you why they are having difficulty accomplishing a task than their supervisors.

Lobbying for Change

To lobby for change, you need to influence people and excite them about your vision. You may need to persuade a reluctant boss or fight a corporate culture that doesn't understand what you are trying to do. In that case, you need to demonstrate why your requested change needs to occur.

Do your research, and always enter a meeting by being prepared. Study the situation and present all of your findings in a short report, preferably with simple charts or graphs. Give them something they can easily understand. Have the details ready in case you are asked a question, but don't overload people with facts. Show as clearly as possible how your plan will promote positive change.

You may want to revolutionize a cultural change. Perhaps you are a shop manager and people are unmotivated. You may need to bring about change slowly, rather than with one big dramatic gesture. On the other hand, you may need to shake things up in a big way. Whatever the situation, you can successfully lobby for change if you attack the problem with a plan, sound reasoning, and infectious enthusiasm!

Practical Illustration

David entered into his manager's office. Kaitlyn welcomed him inside, and the two of them sat down. David asked, "I was wondering why you wanted to see me. I hope nothing's wrong."

Kaitlyn said, "Absolutely not. Things are going wonderfully. You met your sales goals for this quarter, and as a whole, we're meeting the goals we set."

David nodded, not understanding why he had been called to her office.

Kaitlyn said. "The best time to plan for the future is when things are going well; we need to plan our next step. Now that we have met this goal, we need to challenge ourselves with another one. I called you here today so that you could help set a measurable, attainable goal for our team."

David was more than happy to pitch in and give his input. This helped Kaitlyn build a relationship with her employee, and challenging the team with another goal also set an example for her staff.

Module Seven: Review Questions

1.) Which law governs most large groups?

   a) Law of comparative judgment
   b) Law of sociology
   c) Law of inertia
   d) Boyle's law

2.) What can be defined as an established model or structure?

   a) Paradigm
   b) Brainstorming
   c) Stereotype
   d) Paragon

3.) Which of these is not good advice about "thinking outside the box"?

   a) Ask questions of your employees, customers, former leaders
   b) Don't be afraid to ask the question "Why?"
   c) Often the lowest ranking persons in an organization can't tell you exactly what is wrong because they don't see it daily from their vantage points
   d) Sometimes it is necessary to "think outside the box" and break the paradigm

4.) Which of these is the best definition for innovation?

   a) An improvement on a process or procedure
   b) An earlier event or action that is regarded as an example or guide to be considered in subsequent similar circumstances
   c) The faculty or action of forming new ideas, or images or concepts of external objects not present to the senses
   d) A total redirection or restructuring based upon stated goals and research

5.) Which of these is a helpful tip about using innovation?

   a) There should be solid evidence that a new way of doing things is likely to work before you invest money and everyone's time
   b) To be sure, all innovative strategies will be feasible or cost effective
   c) Change should often be made, just for the sake of change

d) Keep focused on the goals and be unwilling to break rules if they need to be broken

6.) What does a drive to excellence always seek?

a) Innovation
b) Improvement
c) Imagination
d) Immunity

7.) When will people simply give up trying altogether?

a) When their leader is honest, open, and willing to listen to their ideas
b) When your employees are looked upon as "good enough."
c) When innovation first begins
d) When goals are unrealistic or unattainable

8.) If only a few staff members are reaching the goal you set, what should you do?

a) Raise the target
b) Strive to achieve more
c) Stifle progress
d) Lower the goal somewhat

9.) To lobby for change, what do you need to do?

a) Talk to your staff about possible solutions.
b) Influence people and excite them to your vision
c) Set high goals that are attainable but with some degree of difficulty
d) Investigate any potential bottlenecks that might be stifling progress

10.) Which of these is not good advice for successfully lobbying for change?

a) Bring about change with one big dramatic gesture, instead of bringing about change slowly
b) Do your research, and always enter a meeting by being prepared
c) Show as clearly as possible how your plan will effect positive change
d) Attack the problem with a plan, sound reasoning, and infectious enthusiasm

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Module Eight: Enabling Others to Act

As mentioned before, you cannot do your staff's work for them. Besides, if you do their work, what are they getting paid for? You have your own work to do. This is the ultimate goal of the Hersey-Blanchard situational Leadership model: to develop your staff to the point where you can delegate tasks without a lot of oversight.

To be a true leader, you must enable others to act responsibly and not encourage bad work habits by compensating for them or overlooking them. At the same time, you cannot berate an employee for trying hard, but making an honest mistake. The goal of a leader is to empower others. Your success will be dependent on the extent to which you can encourage staff.

Encouraging Growth in Others

A positive attitude is essential to encouragement. No one likes to fail and many take it very personally. While failure should never be rewarded, an understanding attitude and positive outlook can work wonders. A child only learns to walk by falling down many times. The focus is not on the fall, but on getting up. The goal is to walk…then to run.

Meeting with an employee one-on-one is important to positive motivation. Here again, you must use the power of listening. Avoid blame when something goes wrong and focus on the reason for the failure. You may learn someone needs more training, more self-confidence, or more freedom. You may learn someone does not have the tools needed to be successful. You will never know if you don't ask questions and listen – or worse, if you berate someone for a failure.

If someone is willfully defiant, then feel free to be stern and resolute. Take disciplinary action if necessary and document the conversation. If you allow someone to be defiant or lazy out of a misplaced concern for their feelings, you will be performing a great injustice against the rest who are working hard. In most cases, people really do want to do a good job and they have a sense of pride when they meet a challenge.

Creating Mutual Respect

You will never be worthy of respect if you don't give respect. Respect should be given to everyone at all levels unless they deliberately do something to lose that respect.

You need to build respect in other ways as well. Be visible to your staff. Show them you are available and interested in knowing everything about what they do. Develop and demonstrate your knowledge of the organization and details of the product, service, or operation. If you are perceived as being knowledgeable and can answer questions, you will not only earn respect, but will motivate others to learn as well.

The Importance of Trust

Respect inevitably leads to trust. Do what you say and say what you mean. Under-promise and over-deliver to help manage expectations. If you are given a task you know will take you one hour, say you "should" have it done in two hours. You never know when you'll get a phone call that eats into your time or when an emergency may pop up. If you complete it in less than two hours, you will be perceived as a hero. If not, you can call and apologize that it will be "a little later" without much trouble because you said you *should* have it done. You didn't promise that you *would* have it done. If people feel they can rely on you, they will trust you.

Also let people know that you are not asking them to do anything you would not do yourself, or have not done. Work hard and be seen working hard. If you come in early and see others who are there early as well, stop by and simply mention that fact positively. A simple word of recognition will go a long way to earning respect. Without respect, you will never have loyalty and without loyalty, you cannot trust. Without mutual trust and respect, you cannot accomplish great things.

Remember: while your people need to be able to trust you, you need to also trust them.

Practical Illustration

Adam worked on building respect with his staff from the beginning. He came back from lunch, and he waved to Catherine. He stopped by her cubicle and asked her, "How are things going?"

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Catherine sighed and said, "I've been trying to be innovative about this next product launch like you said, but I'm really struggling with finding a new angle."

Adam said, "Is that the same one due by the end of the week?"

"Yes. Do you think you could get me some help with brainstorming?"

Adam assigned another staff member to collaborate with Catherine who he knew excelled at fresh ideas and innovation. Because he showed respect to his staff, they trusted him enough to let him know how projects were going; good or bad. The problem was addressed in a quick and effective manner.

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Module Eight: Review Questions

1.) What is the ultimate goal of the Hersey-Blanchard situational Leadership model?

   a) To know that all members and all teams are created equal
   b) To develop your staff to the point where you can delegate tasks without a lot of oversight
   c) To be an effective leader by using a friendship style based on the individuals or groups they're leading
   d) To develop one style of leadership and use that style always

2.) What is good advice when enabling others to act?

   a) You must enable others to act by coming to you first for advice
   b) You cannot berate someone for trying hard but making an honest mistake.
   c) The goal of a leader is to empower others to work by micromanagement
   d) You should enable good habits by compensating for the bad habits of others or overlooking them

3.) What is essential to encouragement?

   a) A positive attitude
   b) A no-tolerance policy for mistakes
   c) A perfect work ethic and demanding the same from others
   d) An attitude of forgiveness for all mistakes

4.) What is something you could learn from your employee in one-on-one meetings?

   a) That they need more freedom
   b) That they need more training
   c) That they need more self-confidence
   d) All of the above

5.) When is it an appropriate time to be stern a resolute?

   a) When someone questions your practices
   b) When someone is willfully defiant
   c) When someone makes a mistake
   d) All of the above

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6.) If you allow someone to be defiant or lazy out of a misplaced concern for their feelings, what will be the consequence?

   a) That person will appreciate your gentle nature and change their behaviors
   b) You will develop a safe, trusting relationship with your employee
   c) You will be performing a great injustice against the rest who are working hard
   d) Your staff will retaliate and your behavior as a leader will be called into question

7.) What should typically be given to everyone at all levels?

   a) The same monetary pay
   b) Respect
   c) Task lists
   d) Statement of Work

8.) Which of these is not a way to build respect with your staff?

   a) Do not seek them out. Let them seek you
   b) Be visible to your staff
   c) Show them you are available and interested in knowing everything about what they do
   d) Develop and demonstrate your knowledge of the organization and details of the product, service, or operation

9.) What can help manage expectations when it comes to trust?

   a) Promising frequently, to look trustworthy
   b) Never making a promise, in order not to disappoint anyone
   c) Over-promising and under-delivering
   d) Under-promising and over-delivering

10.) What goes a long way to earning respect?

   a) Coming in as early as possible
   b) A simple word of recognition
   c) Over-complimenting
   d) Never raising your voice to an employee

Module Nine: Encouraging the Heart

One of the worst developments in the workplace was the creation of the term "Human Resources." Formerly known as the "Personnel Department," the focus was on dealing with people as *persons*. At a time when industry was supposedly focused on making the workplace more humane in order to increase job satisfaction and productivity, it took a major step backwards.

No one wants to be considered a "human resource." A resource is something you use as long as it is functional. When the shelf life expires or is no longer as effective as it once was, you throw it away without a thought. It would be a glorious thing if every Human Resource department was abolished and the name Personnel made resurgence.

Employees are not robots. Human beings have intellect and emotions. Failing to deal with them on those levels will ultimately backfire. You cannot program loyalty.

Sharing Rewards

If your staff are going to share in the work, make certain they share in the rewards. If you are going to get a bonus for a successful task, share at least a portion of it with your staff. More than one employee has felt betrayed by leadership when the boss gets a big bonus and those who do all the work get nothing. You don't need to give them half or divide it all up among your staff, but you should at least throw them a party, provide a free lunch, or give everyone a pair of movie tickets or a lottery ticket. Do something to show they didn't work hard only to see you take all the credit.

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Celebrating Accomplishments

Set both personal and team goals and milestones. Nothing motivates someone like public recognition. Although some may seem somewhat embarrassed by a public display, inside they are proud they have been recognized. There has never been a recorded study that quoted an employee who was honored in public as saying that they never wanted that to happen again. Celebrate team milestones as well. It breaks up the routine of the workday, gives a well-deserved break, and motivates people to work harder when they return to work refreshed.

Making Celebration Part of Your Culture

You don't need to decorate the office each day or have morning pep rallies, but the workplace should never be dreaded by employees. People spend most of their waking lives at work, with substantially less time for family, friends and activities they would much rather be doing. By the very definition, they come to "work" and you have to pay them to be there. People have to feel motivated by more than just a paycheck.

Be sure to have a welcoming environment where people feel respected. Celebrate special occasions to break up the routine, but don't make celebration itself the routine or no work will get done.

Practical Illustration

Eric's team worked all quarter, sometimes pulling late nights, to meet all their metrics and goals. Eric's supervisors saw this, and they rewarded him with a bonus for a job well done as a leader. Eric was proud of himself, but he was equally proud of his staff. While it wasn't necessary to split the bonus with all his employees, he did come up with a way to reward them for their hard work.

Eric called his team together and said, "I'd like to announce that this quarter we didn't just meet our goals, we exceeded them! Because we all did such a fantastic job, I'm having lunch catered on Friday by our favorite place. Don't bring lunch from home. Just bring your appetites!"

Eric made sure not to plan anything pressing or important that day so that his employees could celebrate and enjoy a job well done.

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Module Nine: Review Questions

1.) What was one of the worst developments in the workplace?

   a) Leadership in the workplace
   b) The creation of email and the use of technology
   c) Deadlines and time management practices
   d) The creation of the term "Human Resources"

2.) What was the term Human Resources formerly known as?

   a) Personnel Department
   b) Sales and Accounting Departments
   c) Accounts Bill-able
   d) Human Relationship Department

3.) What will failing to deal with workers on the levels of intellect and emotion ultimately do?

   a) Program loyalty
   b) Increase job satisfaction
   c) Backfire
   d) Promote loyalty

4.) If your staff are going to share in the work, what else should they share in?

   a) The productivity
   b) The deadlines
   c) The rewards
   d) The paychecks

5.) If you get a bonus for a successful task, which of these is not a good way to share that bonus with your staff?

   a) A party
   b) A free lunch
   c) Give everyone a pair of movie tickets or a lottery ticket
   d) Give everyone half of your bonus

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6.) What is the best way to motivate someone?

    a) Money
    b) Many compliments
    c) Public recognition
    d) Giving them space to work

7.) What is the benefit of celebrating team milestones?

    a) It helps solidify the routines of the day
    b) It motivates people to work harder when they return to work refreshed
    c) It gives them a day off work
    d) All of the above

8.) How would you never want employees to feel about their workplace?

    a) You would never want them to dread the workplace
    b) You would never want them to feel stress in the workplace
    c) You would never want them to get frustrated in the workplace
    d) You would never want them to experience conflict in the workplace

9.) Where do people spend most of their waking lives?

    a) With family
    b) With friends
    c) At work
    d) Doing things they enjoy

10.) What is a way to make celebration a part of the work culture?

    a) Make celebration itself the routine
    b) Have a welcoming environment where people feel respected
    c) Decorate the office each day
    d) Have morning pep rallies

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Module Ten: Basic Influencing Skills

The best leaders are able to influence others to do something and allow them to think it was all their idea. Don't worry about taking credit for every good thing that happens on your watch. As the leader, you get credit whenever your staff succeed because you created the environment that allowed their success.

The Art of Persuasion

Aristotle was a master of the art persuasion, and he outlines his thinking in his work, Rhetoric, where he identifies three important factors: ethos, pathos, and logos.
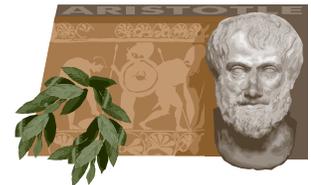
- **Ethos** (credibility) persuades people by using character. If you are respectful and honest, people will be more likely to follow you because of your character. Your character convinces the follower that you are someone who is worth listening to for advice.

- **Pathos** (emotional) persuades people by appealing to their emotions. For example, when a politician wants to gain support for the bill, it inevitably is argued, "it's for the children!" Babies, puppies, and kitties abound in advertising for a reason. Although a car is neither male nor female, they are sometimes called "sexy" in car commercials. Pathos allows you to tie into emotional triggers that will capture a person's attention and enlist their support, but it can be easily abused, leading to a loss of Ethos, as described above.

- **Logos** (logical) means persuading by appealing to a person's intellect. This was Aristotle's favorite and his forte', but not everyone reacts on a rational level.

Of the three, Ethos must always come first. Ideally, you want to appeal to Pathos, back your arguments up with Logos, and never lose Ethos. President Bill Clinton appealed to people using Pathos, saying often, "I feel your pain," but there were serious questions raised about his Ethos, and he often did not back up his appeals with Logos. There is no doubt that he was successful, but there is also no doubt that he was not as successful as he could have been.

The Principles of Influence

Robert B. Cialdini, Ph. D. once said, "It is through the influence process that we generate and manage change." In his studies, he outlined five universal principles of influence, which are useful and effective in a wide range of circumstances.

Reciprocation*:* People are more willing to do something for you if you have already done something for them first. Married couples do this all the time, giving in on little things so they can ask for that big night out or a chance to watch the game later.

Commitment*:* You cannot get people to commit to you or your vision if they don't see your commitment. Once you provide a solid, consistent example, they will feel they have to do the same.

Authority*:* If people believe you know what you are talking about and accept your expertise, they are far more likely to follow you. Despite the rebel cry, "Question Authority," when people need help with something, they will seek out an authority figure. If you place a man in a tie next to a man in jeans and a ratty T-shirt, people will invariably ask the man in the tie for advice on a technical subject first, simply because he *looks* like an authority.

Social Validation*:* As independent as we like to consider ourselves, we love to be part of a crowd. It will always be a part of us, that school-age desire to be accepted, no matter how many times our parents tell us, "If everyone jumped off a cliff, would you join them?" People will always jump on a bandwagon if their friends like the band.

Friendship*:* People listen to their friends. If they know you and like you, they are far more likely to support you. A pleasant personality can make up for a multitude of failures. More than one leader has been abandoned at the first sign of trouble because they were not very well liked.

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Creating an Impact
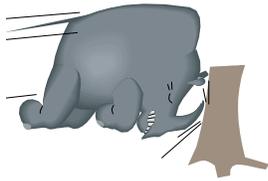
As mentioned before, communication is accomplished with more than just words. The more of the previous leadership skills you develop, the more you will make an impact. In addition, the bigger the impact, the greater the positive change you can create.

Impact is created by a number of intangible factors:

- A confident bearing, tempered by a kindly manner

- A strong sense of justice, tempered by mercy

- A strong intellect, tempered by the willingness to learn

- A strong sense of emotion, tempered by self-control

- A strong ability to communicate, tempered by the ability to listen

- A strong insistence on following the rules, tempered by flexibility

- A strong commitment to innovation, tempered by situational reality

- A strong commitment to your followers, tempered by the ability to lead

Above all: maintain a strong personal commitment to your vision.

Practical Illustration

Sarah was nervous about going to see her boss, Robyn. Robyn was stern, strict, and always carried an air of authority. Sarah lightly knocked on Robyn's door, and was invited inside.

After some small talk, Sarah cut to the chase. "Robyn, the reason I came to see you today is that I think our client would benefit from holding our next meeting at a more casual location. I know the rule is that we go to business offices, hotels, and other professional places; however, I can see this particular client being more suited to a casual, friendly dining spot. I think it would have a positive influence on the sale."

Robyn listened and then said, "It looks like you've given this a lot of thought. Follow through with the idea, Sarah."

She was surprised. "Really? Thanks!"

While Robyn was a strict authority figure by nature, she also knew when to be flexible.

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Module Ten: Review Questions

1.) As a leader, when do you get credit?

   a) All the time
   b) Only when your plan ultimately succeeds
   c) Whenever your staff succeed
   d) Whenever you save the company time and money

2.) Who in history was a master of the art of persuasion?

   a) Descartes
   b) Socrates
   c) Aristotle
   d) Plato

3.) Which of these is not one of the three important factors in the art of persuasion?

   a) Ethos
   b) Logos
   c) Pathos
   d) Mythos

4.) Which of three important factors stands for "credibility'?

   a) Ethos
   b) Logos
   c) Pathos
   d) Mythos

5.) Which of the three important factors persuades people by appealing to their intellect?

   a) Ethos
   b) Logos
   c) Pathos
   d) Mythos

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6.) Who said "It is through the influence process that we generate and manage change"?

    a) Aristotle
    b) Plato
    c) Hersey-Blanchard
    d) Robert B. Cialdini, Ph. D.

7.) If you want to get people to commit to you and your vision, what do they need to see?

    a) Your validation
    b) Your gratitude
    c) Your commitment
    d) Your reciprocity

8.) When people need help, who do they usually seek out?

    a) A co-worker
    b) Their lower level employees
    c) Their friends
    d) An authority figure

9.) What can make up for a multitude of failures?

    a) A pleasant personality
    b) Reciprocity
    c) Commitment
    d) Social validation

10.) Which of these is not an intangible factor that creates impact?

    a) A strong sense of justice, tempered by mercy
    b) A strong commitment to innovation, tempered by creativity
    c) A strong sense of emotion, tempered by self-control
    d) A strong insistence on following the rules, tempered by flexibility

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Module Eleven: Setting Goals

A vision without specific, targeted goals is just a wish or a hope. Without targeted goals, how will you ever know if your vision is being accomplished? A vision needs a project roadmap with milestones, but how do you determine what those goals are? First, we will discuss goals themselves, then how to determine what your goals should be and how to support them.

Setting SMART Goals

SMART goals are:

- **Specific:** The vision itself is general while the goals are specific targets to be met. Specific goals answer the questions of who, what, when, where, why and how questions as specifically as possible.

- **Measurable**: Goals must be measurable in terms of progress and attainment. They must be tracked according to the amount of time or money spent, or results achieved as appropriate.

- **Attainable**: A goal which cannot be met, is not a goal, it is an ideal. If you know you need certain infrastructure in place to accomplish your vision, you should break down your goals into attainable steps you can monitor as each step is put into place.

- **Realistic**: A goal may be attainable, but not with the resources at hand. In that case, you need other goals to build up to the level where the attainable goal becomes realistic. A goal may be possible, but you need the right people with the right amount of time and support to make it happen.

- **Timed**: All goals need to be accomplished within a given time frame. Deadlines may indeed be missed, but without any timetable, there will be no sense of urgency and no reason not to put it off until "later."

Each goal should lead to the "next step" in the overall plan until the ultimate vision is reached.

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Creating a Long-Term Plan

Also called Strategic Planning, the long-term plan is the road map that guides you to the ultimate realization of your vision. As discussed in the previous module. A goal may be possible, but not attainable or realistic – now. You may be missing a quality person for a key position, you may lack the funds, or time to achieve the higher-level goals, so lower-level stepping stone goals must be planned.

If your goal is to unify a modern computer network throughout your organization, but you only have a few outdated computers and older shared printers, your ultimate goal will be possible and attainable, but not realistic. If you do not have the money for the new equipment and do not have a strong IT person on staff, your goal will be unattainable. If you need everything done in a week, your goal cannot be timely, as it will take much longer. Intermediate goals, however, can make your ultimate goal realistic, attainable, and timely.

You might first want to increase your revenue through increased sales, a fundraiser, long-term business loan, or by other means. You can make a goal to hire a network guru for a reasonable cost who can analyze your current systems and determine what needs to be upgraded according to modern networking technology. That analysis will provide you the information to set new goals of buying, configuring and implementing the equipment, then adding the infrastructure to network it all together. In the end, the goal that seemed impossible will become a reality, according to your original vision.

Creating a Support System

Once your goals are established you need a way to ensure they are set into motion. Duties must be assigned and documentation must be established to support and track progress. A Gantt Chart, a type of bar chart that illustrates a project schedule, is a great way to track milestones over a period of time. You need to establish the tools necessary to track progress or development as appropriate. These might include a simple checklist for some tasks and complicated advanced software tracking systems for others.

Monitoring and oversight are the keys to achieving all goals.

Practical Illustration

Sophie presented her goals to Thomas, the leader, and she said, "What do you think of the plan that we have laid out?"

Thomas said, "I think that your goal of updating our technology is specific, measurable, attainable, and timed. However, the only thing that is unrealistic about the goal is how much it is going to cost."

Sophie said, "I was hoping that you could help me brainstorm ways to come up with the revenue."

Thomas nodded. "In the past, we've tried new ways of increasing sales to pay for equipment that we needed, or taken out a business loan. But given the time frame, I feel like our best bet is a fundraiser."

They included the fundraiser idea in the final goal, making sure once again that the goal was SMART: specific, measurable, attainable, realistic, and timed.

Module Eleven: Review Questions

1.) What is a vision without specific, targeted goals?

    a) A committed, important legacy
    b) A plan for the future
    c) Just a wish or a hope
    d) A system of gaining followers

2.) What does the 'A' in the SMART acronym stand for?

    a) Accomplishment
    b) Attainable
    c) Achievable
    d) Applicable

3.) What answers the questions of "who, what, when, where, why and how"?

    a) Specific goals
    b) Measurable goals
    c) Applicable goals
    d) Timed goals

4.) How can measurable goals be tracked?

    a) According to the amount of time spent
    b) According to the amount of money spent
    c) According to the results achieved
    d) All of the above

5.) While a goal may be possible, what do you need for it to be realistic?

    a) A group of dedicated employees who will obey your authority no matter what
    b) Goals that are measurable in time and attainment
    c) The right people with the right amount of time and support to make it happen
    d) The funding by stakeholders

6.) What should each goal lead to?

    a) A successful completion every time
    b) The next step in the overall plan until the ultimate vision is reached
    c) Dedication and commitment from your employees
    d) A bigger, more important goal

7.) What is the road map that guides you to the ultimate realization of your vision?

    a) An attainable goal
    b) A measurable goal
    c) A short-term plan
    d) Strategic planning

8.) What can make your ultimate goal realistic, attainable, and timely?

    a) Followers
    b) Upper management
    c) Strategic planning
    d) Intermediate goals

9.) Which tool is a great way to track milestones over a period of time?

    a) A RACI chart
    b) A Gantt chart
    c) An electronic whiteboard
    d) A flip-chart

10.) What is the key to achieving all goals?

    a) Monitoring and oversight
    b) Delegation and covering yourself as often as possible
    c) Timely and attainable
    d) Meeting deadlines

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Module Twelve: Wrapping Up

To be a leader, you must first see yourself as a leader. Based on what you have learned so far, you now know what qualities are important in a leader and you have prioritized them as they apply to you. Experience is the greatest teacher, however, and there is no substitute. If you ever had a boss that infuriated you and made you want to quit your job, you know what not to do. If you ever had a parent, teacher, coach, or supervisor who inspired you, you have a good example to follow.

Words from the Wise

- **Thucydides:** The bravest are surely those who have the clearest vision of what is before them, glory and danger alike, and yet notwithstanding, go out and meet it.

- **Woodrow Wilson:** The ear of the leader must ring with the voices of the people.

- **Theodore Roosevelt**: The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint to keep from meddling with them while they do it.

Lesson Learned

- Define "leadership"

- Explain the Great Man Theory

- Explain the Trait Theory

- Understand Transformational Leadership

- Understand the people you lead and how to adapt your leadership styles

- Explain leading by Directing

- Explain leading by Coaching

- Explain leading by Participating

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- Explain leading by Delegating

- Kouzes and Posner

- Conduct a personal inventory

- Create an action plan

- Establish personal goals

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Appendix

Worksheet 1

Goal Card

Leader to emulate: _____

Leadership traits to develop:

1.) _____

2.) _____

3.) _____

4.) _____

5.) _____

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Personal Inventory

(with 1 being low importance and 10 being high importance)

Quality	Self-Assessment Rank (1 – 10)	5 or below? (check)	Above 5? (check)
Honest			
Inspiring			
Broad-minded			
Dependable			
Imaginative			
Caring			
Self-controlled			
Forward-looking			
Intelligent			
Supportive			
Cooperative			
Ambitious			
Mature			
Independent			
Competent			
Fair-minded			
Straightforward			
Determined			
Courageous			
Loyal			
	TOTALS:		

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Post-Assessment

1.) Which theory takes the phrase "Great men are born, not made" literally?

    a) The Great Man Theory
    b) The Generational Theory
    c) The Trait Theory
    d) The Leadership Principle Theory

2.) Which of these is the difference between a good leader and a great leader?

    a) The amount of political clout they have
    b) Writing ability
    c) Military tactical thinking
    d) The number of leadership skills they have developed

3.) What is the ultimate goal of the delegating leader?

    a) Complementing the employee on every task, as continued praise for outstanding performance must be given
    b) An employee who feels fully empowered and competent enough to take the ball and run with it, with minimal supervision.
    c) Delegating tasks to the employee with utmost supervision, for liability reasons
    d) An employee who requires high levels of supervision and task assignment

4.) Which of these are the follower-driven stages?

    a) Delegating and Participating
    b) Selling and Telling
    c) Telling and Participating
    d) Delegating and Selling

5.) Which of these is a way to seek inspiration?

    a) Imagining your legacy
    b) Choose a role model that fits your personality
    c) Read books and conduct research on the internet or at libraries.
    d) Determine how you will accomplish your goals

6.) Which of these is not a question you would ask yourself before preparing a mission statement?

  a) Do you want to communicate better?
  b) How do you want to be remembered?
  c) What do you want people to think of you?
  d) What type of leader you determined to be?

7.) Believe it or not, what's the best influence you can have?

  a) Using writing and speeches to persuade others
  b) A large company of followers
  c) Not trying to influence someone
  d) Not leading someone

8.) What makes others feel empowered?

  a) Listening to them
  b) Having a leader in charge
  c) Being given a compliment in private
  d) Disengaging yourself from your staff

9.) What do most employees enjoy?

  a) Constructive criticism given at regular intervals
  b) Hard work and little involvement from you in working towards the vision
  c) Being part of a larger, successful organization
  d) Giving their loyalty to you

10.) If you can get your employees to accept your vision as their own, and excite them about being part of it, what will they most likely do?

  a) Excel beyond what you (or they) thought possible
  b) Want performance bonuses and awards for validation
  c) Ask the question "What in it for me?"
  d) Crave acceptance

11.) To lobby for change, what do you need to do?

   a) Talk to your staff about possible solutions.
   b) Influence people and excite them to your vision
   c) Set high goals that are attainable but with some degree of difficulty
   d) Investigate any potential bottlenecks that might be stifling progress

12.) Which of these is not good advice for successfully lobbying for change?

   a) Bring about change with one big dramatic gesture, instead of bringing about change slowly
   b) Do your research, and always enter a meeting by being prepared
   c) Show as clearly as possible how your plan will effect positive change
   d) Attack the problem with a plan, sound reasoning, and infectious enthusiasm

13.) What can help manage expectations when it comes to trust?

   a) Promising frequently, to look trustworthy
   b) Never making a promise, in order not to disappoint anyone
   c) Over-promising and under-delivering
   d) Under-promising and over-delivering

14.) What goes a long way to earning respect?

   a) Coming in as early as possible
   b) A simple word of recognition
   c) Over-complimenting
   d) Never raising your voice to an employee

15.) Where do people spend most of their waking lives?

   a) With family
   b) With friends
   c) At work
   d) Doing things they enjoy

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16.) What is a way to make celebration a part of the work culture?

    a) Make celebration itself the routine
    b) Have a welcoming environment where people feel respected
    c) Decorate the office each day
    d) Have morning pep rallies

17.) What can make up for a multitude of failures?

    a) A pleasant personality
    b) Reciprocity
    c) Commitment
    d) Social validation

18.) Which of these is not an intangible factor that creates impact?

    a) A strong sense of justice, tempered by mercy
    b) A strong commitment to innovation, tempered by creativity
    c) A strong sense of emotion, tempered by self-control
    d) A strong insistence on following the rules, tempered by flexibility

19.) Which tool is a great way to track milestones over a period of time?

    a) A RACI chart
    b) A Gantt chart
    c) An electronic whiteboard
    d) A flip-chart

20.) What is the key to achieving all goals?

    a) Monitoring and oversight
    b) Delegation and covering yourself as often as possible
    c) Timely and attainable
    d) Meeting deadlines

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Recommended Reading List

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