



Leadership Development Program

**Facilitator's Guide
January, 2007**

Foreword

Back in 1994 the Department of Defense asked TTI to develop a formal program to help women prepare for management. Over the years the program was modified and improved.

Ken Shields, Canadian Olympic Basketball Coach, asked us to develop a system for master coaches in all sports. Their goal was to have the master coaches mentor the younger coaches. Over the years this program was changed to involve leadership development.

Many organizations find themselves in need of developing new leaders. They feel the real need but find it difficult to identify what that really means. If you ask 10 organizations, you will get 10 different approaches.

Based on this, Bill J. Bonnstetter, founder of TTI, set out to do research on people who had been identified as proven leaders. This research identified five soft skills that all these leaders had in common:

- Influencing others.
- Personal accountability.
- Self-management skills.
- Goal achievement.
- Interpersonal skills.

Today, people are willing to follow a person who has a compelling vision and is personally accountable for his/her own behavior. Goal achievement, self-management, along with interpersonal skills create the image of today's leaders.

Along with the leadership research, Bonnstetter found that without a strong relationship between the facilitator and the protégé, the development process would be just marginally successful. Thus, a behavioral assessment was incorporated into the development process.

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SAMPLE VERSION

“An optimist is a person who sees a green light everywhere; the pessimist sees only the red stop light. The truly wise are colorblind.”

-Albert Schweitzer

Section I: Understanding Leadership—Understanding Facilitating

Leadership: Making You A More Effective Leader

Your Personal Convictions Are the Foundation of Leadership

To be a courageous and effective leader requires you to have strongly held convictions that you believe in and act upon. If you can define what is most important to you and to your goals, you can take action based on these convictions.

It is your values, beliefs and experience that give you the courage and the wisdom to make the tough decisions and meet challenges.

Benefits to the Partners

The success of any leadership development relationship depends on the level of commitment from all involved. The rewards are commensurate with the effort!

As a facilitator, you will gain:

- Personal satisfaction of giving back something of personal importance.
- A legacy of personal knowledge, insight and experience.
- A new perspective.
- Higher visibility in your organization and with your peers.
- Renewed energy.
- Renewed commitment to developing leadership.

Your protégé will gain:

- Assistance in defining realistic career goals, strategies and options;
- Greater self-confidence.
- Increased visibility within the coaching community.
- Leadership growth beyond his/her comfort zone.
- Personalized education geared toward specific needs.
- Increased organizational awareness.
- Preparation for advancement.
- Political savvy.
- Broadened team building skills.
- Risk-taking experiences.

Your organization will benefit from:

- A growing “seasoned” body of leaders with a network of connections.
- Increased exposure to broader points of view.
- Cost-effective training.
- Increased cross-organizational communication.
- Motivation for those with a passion for coaching.
- Increased strategic planning and goal setting at the community level.
- Individuals with a sense of stability in the midst of change.
- An effective way of integrating new ideas into community project work.
- A greater recruiting pool.
- Access to unique role models outside normal channels.

Leadership is not limited to the office or home. There are great rewards for everyone in the leader’s life.

Your Roles & Responsibilities as a Facilitator

What is a facilitator?

A facilitator is someone who offers guidance, wisdom, experience, encouragement, and loads of meaningful feedback. You are a partner in learning, inquiry and personal growth.

A facilitator communicates:

- Unwritten rules of how things “really” work.
- Political considerations in decision-making.
- Unspoken team cultures and values.
- Skills necessary for advancement.
- Nuances of communication.

What are the qualifications of a facilitator?

You must have:

- The ability to influence and persuade those in positions of power.
- Credibility with your colleagues.
- A broad range of experience.
- The respect of peers and managers.
- Proven leadership skills.
- Understanding of your protégé's enthusiasm and desire for leadership growth.
- Sufficient time and energy to commit to the relationship.
- The ability to listen actively to the protégé's goals and provide candid feedback.
- The ability to see a broad perspective.

What are your responsibilities as the facilitator?

Your responsibilities include:

- Completing your TTI on-line Leadership Development Assessment.
- Reviewing and providing insight on the protégé’s Leadership Development Assessment.
- Guiding the protégé through the leadership process.
- Serving as a solid role model.
- Providing constructive feedback and critical analysis.
- Maintaining confidentiality.

As facilitator, you give your protégé:

- Vision and insight.
- Advice and counsel.
- Support and encouragement.
- Enhanced self-confidence and self-esteem.
- A supportive environment for taking risks and handling failures.
- Insight into the “games” of the team culture.
- A partner who actively listens to them.
- Understanding and acceptance of their individuality.

Your Protégé's Roles & Responsibilities

What is a protégé?

A protégé is someone who has the desire, commitment, and initiative to expand his/her career and develop leadership skills by listening to and working with a trusted advisor and learning partner—a leader.

What are the qualifications to become your protégé?

Your protégé must have:

- The desire to learn and grow as a leader.
- The ambition to expand his/her career.
- The willingness to take risks.
- Commitment and loyalty to his/her team.
- A positive perception from peers and colleagues.
- A combination of intelligence and common sense.
- A strong commitment to goals and personal responsibility.
- Willingness to listen and follow the Leadership Development Program directions.

What are your protégé's responsibilities?

Your protégé's responsibilities include:

- A dedication to building the leadership development relationship.
- A willingness to assess individual needs.
- Completing the TTI on-line Leadership Development Assessment.
- Creating his/her personal Leadership Development Plan.
- Being proactive in his/her own skill development.
- Actively participating in the partnership.
- Taking full advantage of the assistance offered.
- Willingness to actively listen to the facilitator's advice, critically reflect on it and take action.
- Maintaining confidentiality.
- Understanding and acceptance of his/her individuality.

6 Steps of the Leadership Development Process

A Quick Summary of How it Works

The Basic Foundation of Your Partnership

You and your protégé are about to embark on an exciting journey that has as its basic foundation three essential ingredients of any relationship:

Trust - Honesty - Respect

You will have many opportunities to learn about each other. However, the process will require respect for each other, an honest process of communication and trust that not only maintains confidentiality but also allows you to take risks.

This is a summary of the objectives, methods, and guideline times needed for each step of the leadership development process. It is up to you and your protégé to decide how long you want to spend on each step. Each partnership will be different, and some partnerships may take days or weeks and have several meetings before they complete a step.

Step 1: The Initial Meeting

The initial contact should be made by the protégé who should introduce him/herself to the facilitator with whom they have been matched.

Objectives: To meet each other and discuss the leadership development process and to begin building this partnership.

Method: You are given dialogue questions to help the partnership start on a solid foundation of trust and commitment.

Materials Needed: Facilitator's Guide, Protégé's Guide, completion by both leader and protégé of the on-line Leadership Development Assessment.

Time Needed: 1 hour.

Outside Activity: Facilitator and protégé will generate the reports from the Leadership Development Assessment and exchange them by email following this meeting.

Step 2: Building the Relationship

- Objectives:** To strengthen the partnership, to develop strong communication skills, and to discover backgrounds and styles.
- Method:** The Leadership Development Assessment Reports provide the basis for this meeting. Dialogue Questions are provided to aid discussion.
- Materials Needed:** Leadership Development Assessment Reports, Leader’s Guide, and Protégé’s Guide.
- Time needed:** 1-2 hours.
- Outside Activity:** Leader will offer suggestions as the protégé begins writing his or her Working Paper.
The protégé will prepare the Working Paper for discussion in Step 3.

Step 3: Strategic Planning and Commitment

- Objectives:** To help the protégé start the process of goal setting through review of past accomplishments and projection of future goals.
- Method:** Dialogue questions are provided to discuss your protégé’s Working Paper. Together you will formalize this discussion into the Leadership Development Plan.
- Materials needed:** Facilitator’s Guide and Protégé’s Guide.
- Time needed:** 1-2 hours.
- Development Plan:** The purpose of this meeting is to eliminate any adversarial environment from the beginning of the partnership.

Step 4: Understanding the Module Structure and Process

- Objective:** To help both facilitator and protégé understand the “process” of working through the Leadership Development Modules.
- Method:** Self-study of a 5-stage process to help leaders learn about ways to move the protégé through the Leadership Development Modules.
- Time needed:** To be determined by the partnership.

Step 5: Working through the Leadership Development Modules

Objective: To become familiar with the modules; to work through any or all of the five Leadership Development Modules, as determined in the Leadership Development Plan.

Method: The method for working through each module is outlined at the beginning of each module. Self-assessments, module evaluations and activity plans will help identify and assign activities that focus the protégé’s training.

Time Needed: To be determined by the partnership.

Outside Activities: To be determined by the partnership.

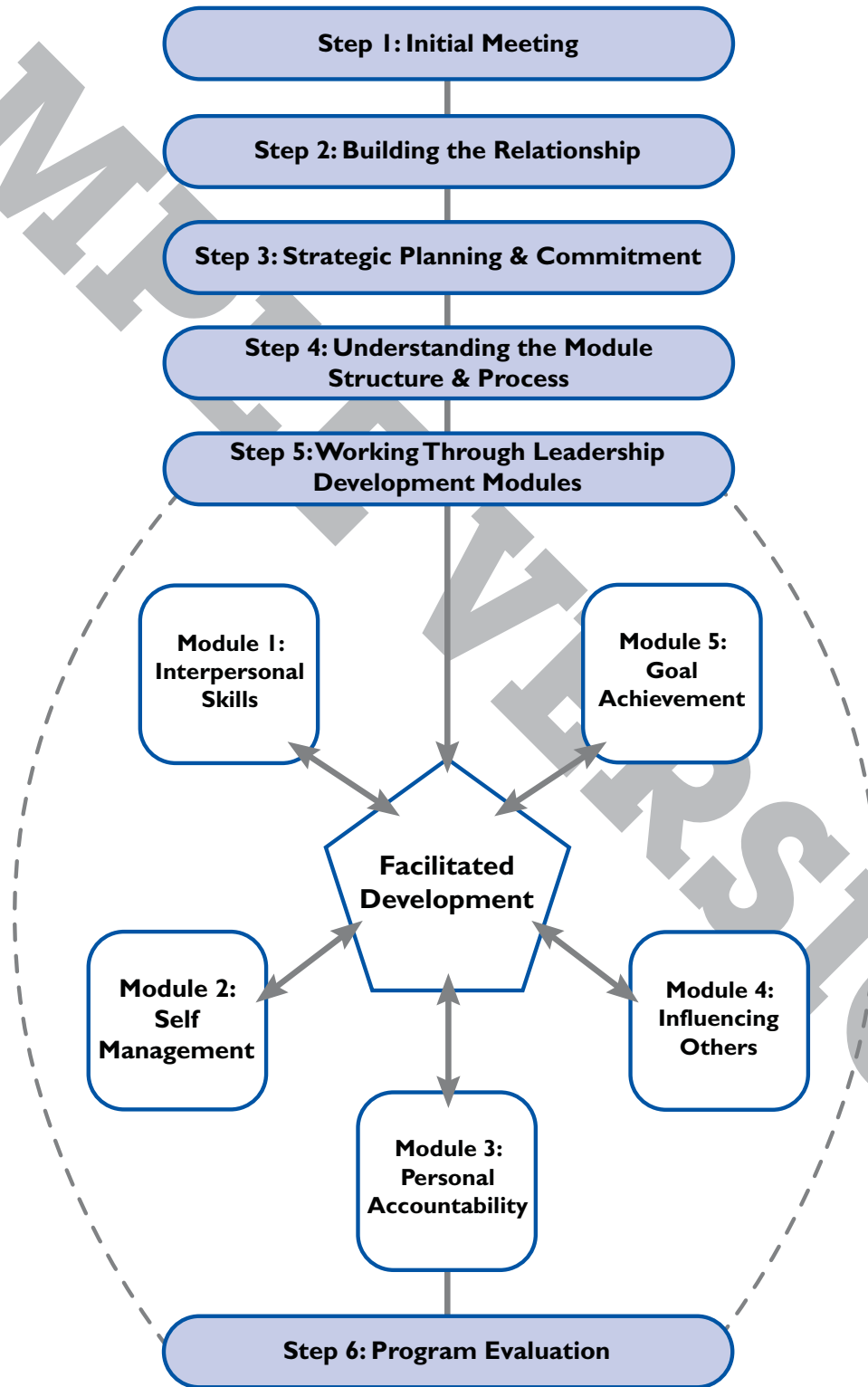
Step 6: Program Evaluation

Objectives: To determine how the protégé can most effectively use the information and skills learned in this program; to conclude the partnership and celebrate accomplishments.

Method: Dialogue questions will help you determine the protégé’s expectations and implementation of skills. A final evaluation will conclude the partnership in a positive and affirming process.

Time needed: 1 hour.

The Leadership Development Process



Step I: The Initial Meeting

A Development Formula: Chemistry = Trust + Honesty + Respect

To Get Started... Get Acquainted!

Break the ice by giving brief information about yourself: Family, hobbies, passions, educational background, and positive experiences in coaching and leadership. Your protégé is interested in your background, how you started, and what contributed to your success. Times of intuition and opportunity are also valuable insights to your protégé. Get to know each other and work towards a trusting relationship.

What Do You Need From This Meeting?

Now is the time to determine your protégé’s level of commitment to developing as a leader. It is important that you assess your protégé’s motivation and degree of commitment before investing time and energy to the partnership. Trust your instinct. If you sense limited commitment or a negative attitude, carefully evaluate the potential of this partnership.

Suggested Dialogue Questions:

- What other roles do you have in your life?
- What do you enjoy in your free time?
- What is your educational background and how does it support your goals?
- What are your professional experiences?
- Have you ever had a leader/facilitator before? If so, what did you like least/most about the partnership?
- If so, what was the most important benefit you gained from the partnership?
- Why did you choose to be in this program?

If you do not see commitment at this stage, STOP the process at this point!

Refer to Appendix A, Troubleshooting, Page 68.

Additional Notes or Comments About Step I

Notes:

Preparation for Next Meeting: *(Decide now when you will meet again).*

Date, Time and Place:

Action Before Next Meeting:

Leader and Protégé:

Exchange by email your personalized Leadership Development Assessment Reports.

Other Action Items:

Step 2: Building the Relationship

By now, you should have exchanged your Leadership Development Assessment Reports and be ready to review them together. These reports are a great communication tool, and you will want to refer back to the different elements of the reports as you work through your partnership activities. At this meeting, go through each section of your reports and discuss similarities, differences and whether or not you agree with the results.

Dialogue questions will help you understand each other.

Summarize your findings on page 33.

General Characteristics and Unique Talents:

- What are some of the statements you agree with? Why?
- What would you disagree with? Why?
- How would you rephrase the statement to be more like your style?
- What kinds of “blind spots” do you feel it uncovered?
- What would friends and colleagues say if they read it?
- Are we similar in style or opposite?
- How will our knowledge of differences and similarities help or hinder our partnership?
- Identify two or three of your leadership talents.
- Are you currently using these talents?
- Do you see yourself under utilized? Why?

Value to Your Team:

- Identify 2-3 strengths and specific talents you agree with.
- How can you capitalize on these strengths?
- How can these strengths benefit your team?

Checklist for Communicating:

- What is the most important thing you need from others who communicate with you?
- What is your favored communication style?
- Do you feel that you communicate effectively?
- Do you feel comfortable adapting your communication style to others' needs?
- What type of feedback do you receive from others concerning your communication style?

Don’ts on Communicating:

- Identify 2-3 methods of communicating you DO NOT like.
- What can we do to prevent our partnership from getting into these traps of communication?
- How can we confront our partnership if we aren’t communicating effectively?

Communication Tips:

- Identify the most accurate ways listed of communicating with you.
- Why do these methods work best when trying to communicate with you?
- From your own experience, are there any other ways that are not included in the report?

Ideal Environment:

- What type of environment is ideal for your best performance?
- How does your current job match your ideal environment?
- What kind of freedom do you need?

Perceptions:

- Do you see yourself as all of the characteristics listed in the report?
- How do you feel when you are frustrated?
- What is the dividing line between moderate tension and stress for you?
- Do you agree with how others may see you under pressure?
- How would you like to be perceived? By your organization? By your peers?

Time Wasters:

- What are three examples of ways you waste time?
- How do you feel when you have to play “catch up”?
- What techniques could you employ to use time more wisely?

Adapted Style:

- Describe a scenario of where you have adjusted your behavioral style to fit the situation.
- Identify 2-3 behavior tendencies you see your position requiring.
- How do the tendencies listed in this section conflict with the real needs of your position?

Natural and Adapted Style:

- Do you agree with how the report shows you deal with problems and challenges?
- How flexible are you?
- Do you agree with how the report shows you want the pace of your environment?
- How about procedures, both naturally and under pressure?

Keys to Motivating:

- What motivates you?
- Does your organization provide a motivational environment for you?
- What are 2-3 things we can do to keep you motivated?

Keys to Managing:

- What does “success” mean to you?
- What 2-3 critical success factors are important to you to achieve success?
- Are any of these currently being done?
- Are all of these within your control? Which are driven by external factors such as budget, geography, etc?

Strengths and Weaknesses:

- What do you feel are your weaknesses? Why?
- Identify 2-3 of the weaknesses you agree with.
- Cross out the ones you disagree with.

Impact to the Organization:

- How do you feel your strengths impact your relationships with:
 - Peers?
 - Upward in the organization?
 - Downward in the organization?
- How do you feel your weaknesses impact your relationship with:
 - Peers?
 - Upward in the organization?
 - Downward in the organization?

Notes & Comments About the Leadership Development Assessment Report

General Characteristics and Unique Talents:

Value to Your Team:

Checklist for Communicating:

Don’ts on Communicating:

Communication Tips:

Ideal Environment:

Perceptions:

Time Wasters:

Adapted Style:

Natural and Adapted Style:

Keys to Motivating:

Keys to Managing:

Strengths and Weaknesses:

Insights Gained:

Action Plan:

- What three areas do you feel you'd like to work on?
- How can developing skills in these areas make you more effective?

Additional Notes or Comments for Step 2:

Preparation for next meeting: *(Decide now when you will meet again).*

Date, Time and Place:

Activity Required Before Next Meeting:

Protégé:

Complete Working Paper and provide to Facilitator.

Other Action Items:

Step 3: Strategic Planning & Commitment

Creating the Leadership Development Plan

The primary objective of this step is to help your protégé use the information from his/her Working Paper to create their Leadership Development Plan.

Your protégé will have completed their Working Paper, setting goals by reviewing past accomplishments and dreaming about the future. Your job as facilitator is to bring experience and knowledge to your protégé’s vision of where he/she would like to go.

Dialogue Questions About Your Protégé’s Working Paper

Protégés should provide their Working Paper on separate paper. Facilitators can use the following Dialogue Questions to learn more about the protégé’s thinking process while completing the Working Paper and to help expand the protégé’s planning.

- Describe some of your accomplishments that:
 - a) felt terrific
 - b) had a lot of impact
 - c) involved teamwork
 - d) taxed your skills, or
 - e) were really fun

- What did you learn from each of them?
- What did you especially do well?
- What would you do differently next time?
- What did you write down for your “Vision /Goal”? Why?
- How long have you had that particular dream or vision?
- What steps did you write down for getting to your vision?
- Why do you feel this is the clearest path to your goal?
- What types of barriers do you perceive in attaining this goal?
- How did you determine the time commitments and the barriers to each of these steps?
- How are you planning to overcome those barriers?

Your Protégé’s Level Of Commitment Is Critical To The Leadership Development Partnership.

Take this opportunity to listen carefully for the protégé’s level of commitment. You want to be sure that your protégé is truly committed to developing as a leader and will invest the time and energy it will take for the necessary activities.

Dialogue Questions About Your Protégé's Commitment

- Why is this vision important to you?
- How much time and energy are you willing to devote to develop your career?
- How do your personal values affect your career goals?
- How do you react when your personal values conflict with your career goals?
- What other barriers might prohibit you from achieving your vision?
- What changes will you see that will allow you to know you have achieved your vision?
- What will you hear from others that will indicate you have achieved your vision?
- How will you feel when you have achieved your vision?
- What is your commitment to the leadership development process?
- What are your expectations of me as your facilitator?
- What can I expect from you?
- Do you feel optimistic about this process?

Learning Agreement: Formalizing your Commitment

Since your initial meeting, you have gained additional insight about your protégé. Your protégé has increased self-awareness about personal characteristics and goals. Your communication should be more trusting and open, and your relationship should now be at a level of honesty and respect.

It is now time to formalize the commitment and responsibilities of the facilitator and the protégé by signing the Learning Agreement in Appendix B. This helps you come to an agreement about time, objectives and activities and be sure you are clear about these types of commitments before proceeding.

After your discussions, remember to transfer all information to the Leadership Development Plan on pg. 38.

Additional Notes or Comments for Step 3:

SAMPLE VERSION

Preparation for the Next Meeting: *(Decide now when you will meet again).*

Date, Time and Place:

Activity Required Before Next Meeting:

Leader & Protégé:

Step 4 explains the structure and process for working through the Leadership Development Modules. Both leader and protégé should review all the information in Step 4 before proceeding to the modules.

Other Action Items:

Leadership Development Plan

“Vision/Goal”

How do I want people to describe me as a leader?

What do I see myself accomplishing as an emerging leader?

The most effective leaders are those who can weave disparate goals together into a complementary whole.

Career Stops and Major Assignments:

Priority#	Module Name:	Start Date:	Completion Date:
_____	Interpersonal Skills	_____	_____
_____	Self Management	_____	_____
_____	Personal Accountability	_____	_____
_____	Influencing Others	_____	_____
_____	Goal Achievement	_____	_____

Protégé’s Signature

Date

Leader’s Signature

Date

Step 4: Understanding the Module Structure & Process

Step 4 is a “self-study” step for both facilitator and protégé, not a meeting with your protégé.

Now you must become familiar with the module structure and process before working through the Leadership Development modules that you and your protégé have prioritized.

It is important to remember that the Leadership Development Plan created in Step 3 is the very heart of the leadership development program. You will want to refer back to it before and after each module. It is your map of where you will go next.

Summary of the Five Leadership Development Modules

Each module is designed to develop one of the five essential leadership skills. The modules are located in your guide on the following pages:

Module	Page
Interpersonal Skills	46
Self-Management Skills	50
Personal Accountability	54
Influencing Others	58
Goal Achievement	62

Interpersonal Skills: The ability to interact with others in a positive manner.

- Initiates and develops relationships in positive ways, often building collaborative relationships and networks.
- Relates easily to and successfully works with a diverse range of people of varying backgrounds, ages, experience and education levels.
- Actively listens to others and communicates in ways that are clear, considerate and understandable.
- Manages conflict and achieves satisfactory resolution.

The days of the authoritarian leader are over. Good interpersonal skills are vital to generate the personal trust and respect needed for leadership effectiveness.

Self Management Skills: The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames; ability to “stay cool under fire”.

- Creates a vision, demonstrates values, and sets priorities to meet responsibilities.
- Maintains focused, efficient activity in pursuit of team objectives in an organized, innovative and independent manner.
- Engages in continual learning and self-improvement, is self-reflective and eliminates time wasters in pursuing high quality work.
- Maintains poise, composure and focus in periods of high stress.

A person who expects to effectively manage others must first be capable of effectively managing him/herself.

Personal Accountability: The ability to answer for personal actions.

- Accepts personal responsibility for the consequences of personal actions.
- Avoids placing inappropriate or unnecessary blame on others.
- Stays committed to objectives regardless of the success or failure of personal decisions.
- Examines “what worked well, what didn't and why” as lessons learned from past experiences to improve upon achieving future successes.

A leader who has mastered personal accountability will inspire his/her protégés and team to exhibit the same behaviors. Personal accountability is leadership by example.

Influencing Others: The ability to personally affect others' actions, decisions, opinions, or thinking.

- Effectively impacts others' actions.
- As a “team builder”: uses collaborative approaches to make decisions, initiate change and gain commitment from others around them to achieve desired results.
- Analyzes others' opinions and helps them understand and act upon the desired alternatives.
- Persuades in a positive manner by listening to and accepting others, being trustworthy and demonstrating ethical behavior.

Today's leader is in a position of influence, rather than power. Your ability to influence others will be your most critical key to leadership success.

Goal Achievement: The overall ability to set, pursue, and attain achievable goals regardless of obstacles or circumstances.

- Establishes a vision, explores possibilities and opportunities and sets goals for self/athlete/team that are relevant, realistic and attainable.
- Identifies and implements required plans and milestones to achieve specific goals.
- Uses teamwork effectively and initiates timely activity toward goals.
- Despite challenges and problems, stays on target to meet goals.

Understanding the Module Structure

Each Leadership Development Module is designed in five stages to follow a consistent, yet evolving development process. Think of these five stages as checkpoints on the critical path as you guide your protégé through the module from beginning to completion. Work at your own pace. Each stage does not necessarily equal a meeting. For example, the implementation stage will probably take several months to complete. Your job is to assume one, or any combination of the basic roles – Guiding, Counseling or Challenging—to keep the protégé moving towards self-sufficiency in their own leadership development. Along with the matching of facilitator and protégé, it is this structure and process that makes TTI’s Leadership Development Program unique, and uniquely successful as a facilitated program.

**Dialogue Questions are included for each module.
Use these questions throughout the module at the stages indicated to help you determine the activities you want the protégé to work on.**

Summary of the Five Stages of Each Leadership Development Module

Stage 1 - Discovery: Definitions and benefits of the specific leadership skills to be learned in the upcoming module

This discussion should take place just before beginning a module. Dialogue Questions help to get your protégé thinking about the skills needed in a particular area and will help to focus on those skills.

At the beginning of each module, there is a Protégé Self-Assessment that the protégé completes about his/her understanding of what is needed to master a particular skill set. Read it carefully so that you are clear about the meaning of each of the skills.

Stage 2 - Assessment: Which of these skills should the partnership work on?

It is most helpful to give your protégé an opportunity to go through the pre-module Self-Assessment in their own time. Then, meet to discuss the results and strategy. This gives you the time to gather individual thoughts and experiences in this area.

The protégé will also use this pre-module Self-Assessment to help identify needs and priorities and serve as a benchmark for evaluating the module on completion of all activities.

Stage 3 - Strategy sessions: Recommending assignments and training

The most important benefit to a partnership is being able to specifically recommend challenging developmental assignments and training geared toward your protégé's abilities and needs. The Thought Starters and Notes section of the Leader's Guide should help you to prepare for this session.

During this session you will be completing Activity Plans with your protégé. Dialogue Questions help you to identify resources and solutions. The Activity Plan Worksheet includes goals, activities, time frames and results of your protégé's pre-module Self-Assessment. Now your experience will help you make suggestions to your protégé to enhance their skills in a particular area.

“What Types Of Activities Should I Recommend?”

Most assignments fall into one of the following categories, but every organization will have different availability for each type of assignment.

Formal Training is usually in the form of classroom, seminars, schools, colleges/universities, distance learning, technical courses, certification programs, etc.

Reading Materials/Internet includes books, textbooks, magazines, newsletters, periodicals, newspapers, etc. The Internet is a valuable resource with access to many specialist websites.

Audio/Video activities include using extensive libraries of information available in audio or video format.

Shadowing Experience is an opportunity for the protégé to discreetly observe leadership qualities in the real world.

Leadership Observation is another observation activity in which the protégé observes another leader—not necessarily the facilitator—exhibiting leadership.

Challenging Developmental Assignments emphasizes a stretch in the protégé’s comfort zone to learn and apply new skills. Assignments can entail building relationships with peers, parents or teachers; working with or managing new colleagues; or planning, directing and implementing team programs, projects and policies.

Be creative!

Build on your own experience and don’t limit yourself or your partner to just these activities.

Stage 4 - Implementation: Complete and commence the Activity Plans

It is time for the facilitator and protégé to discuss and complete the Measurables section at the beginning of each module. These Measurables will use the protégé’s pre-module Self-Assessment to help focus the development of skills for each module.

Then, complete and update the Activity Plans. The Activity Plans includes checkpoint dates so you can easily remember to contact your protégé and check on his/her progress.

Stage 5 - Evaluation: Review results of post-module Self-Assessment

Review the Measurables section that the partnership just completed in Stage 4. After completing the recommended activities, your protégé will complete the post-module Self-Assessment. This second rating will help determine the amount of improvement in each skill area. Now you're ready for another dialogue! Use your Dialogue Questions for discussion of what your protégé learned.

At this time, you and your protégé must decide to change, add or modify activities to meet the goals you decided on for the current module, or to return to the Leadership Development Plan and move on to the next module.

You have now completed Step 4.

You and your protégé should have an in-depth understanding of how the Leadership Development Program combines facilitated partnerships, specialized tools, proven techniques and the module structure and process to create a seamless road map to leadership success.

Your partnership is ready to move to Step 5.

“Great leaders are almost always great simplifiers, who can cut through argument, debate and doubt, to offer a solution everybody can understand.”

-Colin Powell

Step 5: Working Through the Leadership Development Modules

Introduction

You and your protégé have now finished your preliminary planning. You have prioritized the five essential leadership skills modules, and your protégé is now ready to commence specific development activities.

All Activity Plans require:

- Goals
- Time frames
- Action steps/methods
- Evaluation

Keep these in mind as you work with your protégé in putting his/her Activity Plans together. Use the Activity Plans as a checklist as you move your protégé through the five stages of each module: discovery, assessment, strategy sessions, implementation and evaluation.

The following pages list the individual skills for development. A contract has been included to hold your protégé accountable for identifying specific activities and completing them within a specified time frame.

Begin the process with the personal skill set your protégé needs most to develop. Do not follow modules in numerical order. Instead, follow in order of priority. Refer to the Leadership Development Plan, pg. 38.

Module I: Interpersonal Skills

This skill set reflects your ability to interact with others in a positive manner. Good interpersonal skills are vital to leadership development success. A leader who is empathetic, compassionate, fair, and encouraging will generate the personal trust and respect needed for leadership effectiveness.

A facilitator with good interpersonal skills:

- Initiates and develops relationships in positive ways, building collaborative relationships with his/her protégés and others around them.
- Is at ease relating to and successfully works with a diverse range of people of varying backgrounds, ages, experience, and education levels.
- Actively listens to others and communicates with others in ways that are clear, considerate, and understandable.
- Manages conflict and achieves satisfactory resolution.

Using the protégé’s Leadership Development Assessment Report as a guide, circle the word below indicating the degree of effort you feel that your protégé will have to put forth to master “Interpersonal Skills.”

SIGNIFICANT

MODERATE

PROTÉGÉ MEASURABLES

How am I going to feel when I’ve improved my abilities and mastered “Interpersonal Skills”?

What impact will this mastery have on my professional abilities? On my personal life?

What will I hear others say about me after I master “Interpersonal Skills” with regard to my skill and development?

Development activities could include:

- Formal training: courses, seminars, certifications, schooling, etc.
- Challenging multi-disciplinary assignments.
- Reading, research and Internet.
- Shadowing.
- CDs, Film/Video.

SAMPLE VERSION

Pre- & Post- Self-Assessment for Module I

To be completed by the Protégé

Date of pre-module Self-Assessment:

Date of post-module Self-Assessment:

Please look at each of the skill sets listed below for this module. On a scale of 1–5, with 1 meaning least skilled and 5 meaning most skilled, circle a rating for each that best describes your level of development. Assess yourself prior to beginning the module and again after completing it. Be prepared to discuss your ratings with your facilitator.

Interpersonal Skills: The ability to interact with others in a positive manner.

Initiates and develops relationships in a positive way, building collaborative relationships with my colleagues and others around them.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Is at ease in relating to and successfully works with a diverse range of people of varying backgrounds, ages, experience, and education levels.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Actively listens to others and communicates with others in ways that are clear, considerate, and understandable.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Manages conflict and achieves satisfactory resolution.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5

Interpersonal Skills

Activity Plans

Costs	Developmental Activities	Start Date	End Date

Protégé’s Signature

Date

Leader’s Signature

Date

Module II: Self-Management Skills

Self-Management is the ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames. It is also the ability to control one’s emotions in challenging “pressure” situations. It requires self-awareness, valuing feedback, making decisions and being willing to change. A leader who cannot effectively manage him/herself will have great difficulty in managing others. Leaders who have mastered self-management are more effective role models for everyone around them.

A facilitator with good self-management skills:

- Creates a vision, demonstrates values, and sets priorities to meet responsibilities.
- Maintains focused, efficient activity in pursuit of team objectives in an organized, innovative and independent manner.
- Engages in continual learning and self-improvement, is self-reflective, and eliminates time wasters in pursuing high quality work.
- Maintains poise, composure and focus in periods of high stress.

Using the protégé’s Leadership Development Assessment Report as a guide, circle the word below indicating the degree of effort the protégé will have to put forth to master “Self Management.”

SIGNIFICANT

MODERATE

PROTÉGÉ MEASURABLES

How am I going to feel when I’ve improved my abilities and mastered “Self Management”?

**What impact will mastery have on my professional abilities?
On my personal life?**

What will I hear others say about me after I master “Self Management” with regard to my skill and development?

Development activities could include:

- Formal training: courses, seminars, certifications, schooling, etc.
- Challenging multi-disciplinary assignments.
- Reading, research and Internet.
- Shadowing.
- CDs, Film/Video.

If you are going to achieve excellence in big things, you develop the habit in little matters. Excellence is not an exception, it is a prevailing attitude.

-Colin Powell

Pre- & Post- Self-Assessment for Module II

To be completed by the Protégé

Date of pre-module Self-Assessment:

Date of post-module Self-Assessment:

Please look at each of the skill sets listed below for this module. On a scale of 1–5, with 1 meaning least skilled and 5 meaning most skilled, circle a rating for each that best describes your level of development. Assess yourself prior to beginning the module and again after completing it. Be prepared to discuss your rating with your facilitator.

Self-Management Skills: The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames; the ability to control oneself under stress.

Creates a vision, demonstrates values and sets priorities to meet responsibilities.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Maintains focused, efficient activity in pursuit of team objectives in an organized, innovative and independent manner.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Engages in continual learning and self-improvement, is self-reflective, and eliminates time wasters in pursuing high quality work.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Maintains poise, composure and focus in periods of high stress.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5

Self-Management Skills

Activity Plans

Costs	Developmental Activities	Start Date	End Date

Protégé’s Signature

Date

Leader’s Signature

Date

Module V: Goal Achievement

An effective leader is one with the overall ability to set, pursue and attain achievable goals regardless of obstacles or circumstances. This applies to the leader’s personal goals, as well as the protégé’s individual goals and team goals. Individual and team goals must be complementary to achieve the highest level of success.

A facilitator who has mastered goal setting and achievement:

- Establishes a vision, explores possibilities and opportunities and sets goals that are relevant, realistic, and attainable.
- Identifies and implements plans and milestones required to achieve specific goals.
- Uses teamwork effectively and initiates activity toward goals.
- Despite challenges and problems, stays on target to complete goals.

Utilizing your protégé’s Leadership Development Assessment Report as a guide, circle the word below indicating the degree of effort your protégé will have to put forth to master “Goal Achievement.”

SIGNIFICANT

MODERATE

PROTÉGÉ MEASURABLES

How am I going to feel when I’ve improved my abilities and mastered “Goal Achievement”?

**What impact will this mastery have on my professional career?
On my personal life?**

**What will I hear others say about me after I master “Goal Achievement”
with regard to my skill and development?**

Pre- & Post- Self-Assessment for Module V

To be completed by the Protégé

Date of pre-module Self-Assessment:

Date of post-module Self-Assessment:

Please look at each of the skill sets listed below for this module. On a scale of 1–5, with 1 meaning least skilled and 5 meaning most skilled, circle a rating for each that best describes your level of development. Assess yourself prior to beginning the module and again after completing it. Be prepared to discuss your ratings with your facilitator.

Goal Achievement: The overall ability to set, pursue and attain achievable goals regardless of obstacles or circumstances.

Establishes a vision, explores possibilities and opportunities and sets goals that are relevant, realistic and attainable.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Identifies and implements required plans and milestones to achieve specific goals.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Uses teamwork effectively and initiates timely activities toward goals.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5
Despite challenges and problems, stays on target to meet goals.	Pre- 1 2 3 4 5
	Post- 1 2 3 4 5

Goal Achievement

Activity Plans

Costs	Developmental Activities	Start Date	End Date

Protégé’s Signature

Date

Leader’s Signature

Date

Step 6: Program Evaluation

Results

An evaluation of the Leadership Development Program is included in Appendix C, which contains Dialogue Questions to be used in discussion with your protégé.

After you have completed the evaluation with your protégé and have left the meeting, spend a few minutes to complete the Program Evaluation, Appendix C, pg. 72. This is your personal evaluation of the insights and benefits you have gained from the partnership.

Graduation

It would be very helpful if you, as facilitator, give your protégé a letter of recommendation to keep on file for future reference. The letter should include comments about accomplishments, abilities and character.

What Comes Next?

Communication between a facilitator and a protégé can continue for a lifetime. Make sure you talk about it so that there is no expectation of communication if either partner would rather not continue to be available.

Your protégé will continue to benefit from the program and the process by retaining his/her Protégé Guide and referring to it on a regular basis. Encourage your protégé to always be better prepared than the next person by continually seeking current information and personal growth.

As facilitator, review your experiences in the program evaluation in Appendix C and decide if you would like to form a new partnership with another protégé.

Section III: Appendices

Appendix A: Troubleshooting

A leadership development partnership can easily get off course; but as with most challenges in life, prevention is most of the battle. Read through the different ways the partnership can be derailed and you’ll find that a little extra time in the early stages of the relationship will prevent many of the challenges faced by the facilitators and protégés.

DERAILED	ON TRACK
Incompatible styles or lack of chemistry.	<i>Use the Leadership Development Assessment Report. Chemistry is defined as “Trust, Honesty and Respect.” The Report offers a vehicle for facilitating chemistry. It is a tool to understand the special talents and value each bring to the partnership.</i>
Unclear expectations on the amount of time spent together. Facilitators may find themselves overcommitted and not able to dedicate the necessary time to the protégé.	<i>Take time at the beginning of the partnership to clearly communicate expectations about schedules and availability. By deciding time commitments, objectives and activities in advance, you will clearly define expectations. (See “Tips for Effectiveness” and “Roles and Responsibilities.”) The Leadership Development Program includes a Learning Agreement (Appendix B) to help clarify these expectations.</i>
Lack of communication.	<i>It is critical to have clear, open and honest communications between all parties involved in the leadership development program. The Leader’s Guide contains systematic Dialogue Questions to help get clear communication. Use all of the tools available in the Leader’s Guide to enhance communication on a variety of levels. The Leadership Development Assessment Report provides a vehicle for communicating strengths and weaknesses, as well as communication do’s and don’ts. The facilitator and the protégé are encouraged to sign the Leadership Development Plan and the Learning Agreement. Specific forms in the Protégé Guide are designed so that the protégé can easily ask his/her facilitator for help and career advice.</i>
Protégé lacks a plan of action for Leadership Development.	<i>One of the most important aspects of Leadership Development is the ability to set well-defined goals. Setting goals requires vision. Once you have a clear vision, it is important to have a written plan with specific goals, time frames, resources and completion dates. The key, however, is to make the plan work for you. Keep it simple, yet complete. The Protégé Guide provides tools for putting together a Leadership Development Plan as well as the Leadership Development Activity Plans.</i>

DERAILED	ON TRACK
Unclear guidelines for graduation or termination of the partnership.	<i>(See Step 6: Program Evaluation) A formalized evaluation and feedback process is essential and helps to determine if further development is necessary or if the partnership is ready to move to another level. (Evaluations are provided in the Leader’s Guide and Protégé’s Guide).</i>
Protégé lacks commitment to personal growth and leadership development.	<i>Evaluating the protégé’s level of commitment is a critical first step to engaging in a relationship. For this reason, we have integrated assessing the protégé’s commitment level in Step 1: The Initial Meeting, and more extensively in Step 3: Strategic Planning and Commitment. If a facilitator senses limited commitment, energy or a negative attitude, carefully evaluate the decision to continue in the relationship.</i>
The facilitator lacks commitment to the partnership.	<i>In an informal partnership, the answer is simple: “Fire” your facilitator. However, in a facilitated program it may prove politically unwise to fire your facilitator. For this reason, TTI distributors act as the Program Manager that is available for intervention. If the facilitator is simply too busy, the Program Manager can replace that facilitator with an alternative. If, however, the facilitator lacks some of the necessary coaching skills, the Program Manager can also help the facilitator bridge the gaps. All of the tools and information in the Leader’s Guide were developed to help the leader to understand the role of the facilitator by suggesting topics for discussion and tools for Leadership Development.</i>
Lack of trust and confidentiality.	<i>Facilitators should be selected based on their strong moral character and integrity. Taking time at the beginning of the partnership to discuss confidentiality can prevent many problems as the partnership progresses.</i>
Unrealistic expectations of promotion.	<i>The process, both formal and informal, is no guarantee of a promotion. The partnership provides the opportunity for the protégé to equip him/herself with the skills necessary for advancement. (See Step 6: Program Evaluation)</i>
Inertia.	<i>There are many reasons for inertia setting in for any partnership. Perhaps meetings are not productive or one partner is waiting for the other to complete some action. A series of missed meetings might cause partners to wonder if they wish to continue. It is up to both partners to communicate their concerns to each other with honesty and either recommit or agree to end the partnership.</i>

Appendix B: The Learning Agreement

Date:

The facilitator agrees to make every attempt possible to fulfill the following responsibilities to the protégé by offering the protégé:

- Vision and insight.
- Advice and counsel.
- Support and encouragement.
- Preparation for upward mobility.
- A safer environment for taking risks.
- Crisis or failure control plans.
- Insight on the games of the corporate culture.
- A solid role model.
- Constructive feedback and critical analysis.
- Respect for the rules of confidentiality.

Other responsibilities include:

The protégé agrees to make every honest attempt to:

- Be totally dedicated.
- Honestly assess his/her individual needs.
- Construct the Leadership Development Plan.
- Take initiative in skill development.
- Be proactive in his/her own Leadership Development.
- Actively participate in the relationship.
- Take full advantage of the training and assistance offered.
- Be willing to accept and follow through on the facilitator’s advice.
- Employ the rules of confidentiality.
- Develop and utilize the skills for leadership.

Other responsibilities include:

Protégé’s Signature

Date

Leader’s Signature

Date

Appendix C: Program Evaluation

Part I

Dialogue Questions to be discussed with your protégé:

- Has your “Vision/ Goal” changed as a result of participating in this program?
- How have you benefited personally and professionally from this partnership and all of the activities you have experienced?
- How have your leadership abilities been enriched over the past year?
- How will you apply your new leadership capabilities to further promote coaching?
- What are your hopes and expectations for the future?
- What have you learned about the process and value of leadership development?
- How will you use your leadership skills?
- What did you like most about our partnership?
- How will you search out further leadership development?
- What kinds of qualities and abilities will you look for in a leader?
- How can we best help each other as we end this partnership?

Notes:

Appendix C: Program Evaluation

Part II

This evaluation is for you to complete about your personal experiences as a facilitator.

Facilitator's personal evaluation notes:

What strengths did I find in myself as a facilitator?

What will I do differently the next time I'm a facilitator?

What will I share with others about the benefits of this partnership?

What have I learned from this partnership and how have my own leadership capabilities grown from the experience?

How long did this partnership last?

What did I like the most about this process?

Will I volunteer to be a facilitator again immediately? At a future date?

Appendix D: Activities

The following is a list of sample activities you can do within your “partnership” during the course of the formal mentoring relationship. Some require your active involvement and might take place during your official leadership sessions or spontaneously as they come to mind or become available. Others allow you to play the role of “learning broker,” where you encourage your protégé to pursue the activities on his/her own, then report back to you.

1. Teach your protégé how to get the most from you. What expertise you actually have, why you’re mentoring him/her, the boundaries you want to set and your typical styles of communicating and thinking.
2. Spend time getting to know each other and building the relationship before formally tackling the protégé’s objectives. These could include talking about the relationship, as well as about your interests and backgrounds. Take time to build trust.
3. Negotiate and come to agreement with your protégé on your expectations; how you’ll work together during the formal relationship, where and how often you’ll meet, the length of the relationship, confidentiality, etc.
4. Urge your protégé to be career self-reliant, taking responsibility for his/her own development.
5. Have leadership development sessions or meetings on a regular basis; weekly at first, then monthly. These can be as short as 15 minutes or as long as a couple of hours, including lunch. Schedule these times on your calendars.
6. Do some of your facilitating by telephone/e-mail.
7. At the beginning of your mentoring sessions, enjoy some small talk and ask protégés to give you an update on their lives, projects and objectives.
8. Offer to tell your career story in some detail. Include high and low points and how these learning experiences helped you.
9. Help your protégé clarify their personal visions—what they would like to be/do/own/influence/be with/be remembered for in the next one to five years; that is, a “vision.”
10. Go to lunch or coffee throughout your relationship and talk about non-work topics: Family, hobbies, upcoming vacations/news events, movies, etc.
11. Ask your protégé to describe tentative goals that could be part of his/her own visions; avoid discouraging him/her even if you’re dubious. Maintain a neutral (or positive) tone and body language. Help him/her take some steps down his/her dream paths and come to his/her own conclusions.