

What's Next: Using the Model

I can think of few situations more frantic than the arrival of a new patient at a hospital emergency room. Perhaps there has been a major auto accident. Several patients are wheeled in from ambulances. The injuries are severe. People's lives hang in the balance. Doctors and nurses fly into action.

Not surprisingly, those actions—no matter how frenzied they appear on the outside—are not random, in content or in sequence. Health professionals follow a well-established algorithm, a step-by-step approach, for handling emergencies. It's the ABC's of diagnosis. First, they check the patient's airway (A). If the airway is blocked, certain next steps are taken. Then the patient's breathing (B) is checked. If there are no signs of breathing, steps are followed to initiate breathing. If the patient is breathing, then, thirdly, circulation (C) is checked: Is blood getting to the extremities of the body? If not, the doctors and nurses take actions to restore circulation. This mnemonic device gives medical professionals an easy way to remember the three essential steps (airway, breathing, and circulation) for dealing with a patient in a crisis moment.

The LDC model can be used in a similar way. Following is an overview of how you can use the model as a step-by-step guide for either planning (when you're a leader of a team) and assessing (when you're evaluating a leadership situation from the outside).

For Planning with Your Team

Step 1: Begin with **Lead**, asking:

- What are we doing to lead well?
- What can we do better?
- What do we need to do to set direction?
- Once the direction is clear, how do we bring alignment to it?
- As we're moving through these actions, how can we tap into people's motivation and energy to bring their best to our work?
- What management steps need to be incorporated?

Step 2: Turn to **Develop**. Ask:

- How are we doing in developing our people?
- As we look at each person, what is an area of strength we can enhance?
- Is there an area of weakness that needs attention?
- What information would be helpful to people?

- Are we taking the initiative to let each person observe someone who has a strength in his or her weak area?
- Are we creating opportunities to observe how people are doing in those areas of weakness?
- What is the best way to give feedback so improvement occurs?

Step 3: Look at **Care** and ask:

- What's the relational or emotional health of the team?
- What can we do to better care for our people?
- Are there things we could be doing to better know each person?
- Are there things we could do to better connect with each person?
- What should we be doing to better provide for our people?
- Do people on our team feel safe and protected by us?

For Assessing a Leadership Situation

Step 1: Start with the **Primary Responsibilities**. Ask:

- What's the need or opportunity in this situation?
- Is this a Lead, Develop, or Care issue, or a combination of two (or even of all three)? Why do I think this is the case?

Step 2: Based on the above assessment, move to the **Operational Aspects** within the problem area(s). For example, if there is an issue with Lead, ask if there is a need or opportunity to set direction, to bring alignment, to release people's energy, or to better manage the work of others.

Step 3: The final step is to turn to the most appropriate practical **Tools and Exercises** offered in part III. If there is a Set Direction issue, for example, suggest to the team leader/manager that he/she walk through the Set Direction Tool with the team to gain a clearer look at the direction in which they need to move. If possible, sit in on the leader's use of the tool to see how well he or she does in using it—then give constructive feedback.

III. TOOLS & EXERCISES

Lead Tools

- Set Direction Tool (Six Questions)
- Align Tool #1 (Alignment of Thinking—An Audit of Group Attitude)
- Align Tool #2 (Alignment of Action)
- Align Tool #3 (Alignment of Resources)
- Align Tool #4 (Alignment of People)
- Align Tool #5 (Selection of People)
- Motivate Tool
- Manage Tool #1
- Manage Tool #2 (Leverage and Develop Management Planning Tool)

Develop Tools

- Development Matrix Tool
- Coach Tool #1 (Developmental Dialogue—DRESSCODES)
- Coach Tool #2 (Developmental Dialogue—COACH)

Care Tools

- Know Tool #1
- Know Tool #2 (Life Stages Chart)
- Connect Tool
- Provide Tool
- Protect Tool

PRIMARY RESPONSIBILITY: LEAD

Set Direction Tool
(Six Questions)

- 1) Think through a situation for which you need to set direction. For the questions in the first column below, use the middle column to write your initial thoughts on the answers.
- 2) Next, discuss your initial responses with someone. Ask the person if he/she sees any gaps or blind spots in your thinking. Ask if your responses are clear and concise. Based on this discussion, add any further thoughts in the third column.

	Initial Thoughts	Further Thoughts
Who should be setting direction?		
Where are we going?		
Why are we going there?		
What does success look like?		
What are our current realities?		
Which boundaries are needed to meet our target?		

ACTION POINT: Write out one tangible step you will take and when you will accomplish it.

Align Tool #1
(Alignment of Thinking: An Audit of Group Attitude)

- 1) Review or redo the Set Direction Tool and determine who is involved.
- 2) Respond to the following questions in column one, and write your initial thoughts in the middle column.
- 3) Once you are finished, discuss your initial responses with someone. Ask if he/she sees any gaps or blind spots in your thinking. Discuss additional ways you could address the alliances in your context. Based on your discussion, add any further thoughts in the third column.

	Initial Responses	Further Thoughts
Is everyone “all in”? Why or why not?		
How are alliances (factions, cliques, circles of friends) having an impact on the group as a whole?		
What are the alliances about?		
How might the issues the alliances are causing be addressed?		

ACTION POINT: Write out one tangible step you will take and when you will accomplish it.

PRIMARY RESPONSIBILITY: LEAD

Align Tool #2
(Alignment of Actions)

This tool is used for aligning goals of an individual, couple, family, group, team, or project.

- 1) Review the six questions in the Set Direction Tool before proceeding.
- 2) Desired Result: Determine the first goal you want to achieve and write it down in the box at the top of the chart below.
- 3) Right Things: In the first column, write down the top four actions that must be accomplished for your goal to be achieved.
- 4) Right Way: In the middle column, write down any qualifiers or descriptions of the actions from column one. Ask yourself, “What is the best way(s) to do this action?”
- 5) Right Time: As you look at what you have written, look for actions that are interrelated or sequential. Ask yourself if there are some that must be in process or finished before another can start. Are there actions that need attention daily, weekly, or at some other regular interval? Use the right column to sequence the four actions (numbering them 1 through 4).
- 6) Repeat this process for the other goals that must be accomplished to achieve your desired end result—breaking up each one into manageable and sequenced actions.

Desired Result:		
Right Things	Right Way	Right Time

ACTION POINT: In the far right column above, under or beside your sequencing numbers, write the date(s) when you will start and complete each action.

PRIMARY RESPONSIBILITY: LEAD

Align Tool #3
(Alignment of Resources)

- 1) Review your answers to the six questions in the Set Direction Tool before proceeding.
- 2) Fill in the chart below, following the instructions in the right-hand column for a task at hand—perhaps one of the actions from Align Tool #2.

<p>Brainstorm a list of resources (things and people) needed to accomplish the task.</p> <p>When you are finished, underline what you have and circle what you need.</p>	<p>Things: People:</p>					
<p>Prioritize the importance of your circled needs.</p>	1.	2.	3.	4.	5.	6.
<p>What are possible ways to secure what you need?</p>						

ACTION POINT: Write down one step you are determined to accomplish after doing this exercise.

PRIMARY RESPONSIBILITY: LEAD

**Align Tool #4
(Alignment of People)**

- 1) Review your answers to the six questions in the Set Direction Tool.
- 2) Fill in the chart below, following the instructions with regard to a current project or goal.

If this is a new project, consider the **roles** that need to be aligned. (What “seats on the bus” are needed?)

If this not a new project, consider the **people** that need to be aligned. (Who is currently in which “seats on the bus”?)

Fill in the “Thoughts to Convey” column of this form with one role in mind.

Fill in the “Thoughts to Convey” column of this form with one person in mind.

Next, set an appointment with prospective candidates and fill in the “Reactions” column during the meeting.

OR

Next, set an appointment with that person and fill in the “Reactions” column during the meeting.

Finally, fill in the last column and schedule additional appointments to work through any alignment issues.

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Project:			
Prepared for (Name):		Meeting Date and Time:	
	Thoughts to Convey	Reactions on Alignment	Further Steps
Where are we going?			
Why are we going there?			

<p>What is the contribution needed from this role?</p>			
<p>Describe the person you need for this role.</p> <p>OR</p> <p>Why is this person currently in the role?</p>			
<p>What does the role look like when done well?</p>			
<p>Why is it critical to the overall project that this role be done well?</p>			

ACTION POINT: Write down one step you are determined to accomplish after doing this exercise.

Align Tool #5 (Selection of People)

- 1) Review the chart below.
- 2) Answer the Action Point questions.

Leader Selection³¹

	<u>Organizational Considerations</u> <i>What exactly is the role, and what does the ideal candidate look like?</i>		<u>Individual Considerations</u> <i>Is the candidate willing to do the work, and is he/she actually suited to leadership?</i>	
CONTEXT	<ul style="list-style-type: none"> • Written job description • Industry knowledge • Time frame • Goals and expectations • Existing structures 	1	<ul style="list-style-type: none"> • Desire • Energy • Openness • Courage • Resilience 	3
FIT	<ul style="list-style-type: none"> • Critical success factors • Cultural values • Relevant experience • Temperament and personal qualities • Necessary skills 	2	<ul style="list-style-type: none"> • Emotional intelligence (EQ) • Deportment • Organization • Learning channel • Adaptability • Communication 	4
				WILLINGNESS
				CAPACITY

ACTION POINT: Answer the following questions pertaining to each quadrant above.

The Organizational Considerations

CONTEXT—*What exactly are you looking for?*

- **Written job description:** What are you asking the person to do? Be as precise as possible.
- **Industry knowledge:** What kinds of knowledge will be essential to success? What does the candidate need to understand about the audience you are serving?
- **Time frame:** When must a decision be made? If there is a deadline to find someone, it will influence the selection process; you may need to revise expectations based on available candidates.

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- Goals and expectations: How will the person know if he or she has succeeded? How will you know? Success can be measured in both results and habits. Clarity will avoid conflict.
- Existing structures: How does the role fit into the whole organization? You need to understand how the new role will fit into the larger picture, because questions will arise.

FIT—*What does the ideal candidate look like?*

- Critical success factors: What habits are needed to succeed as a leader in this role? Will the person be writing reports, dealing with groups, counseling one-on-one, in charge of his or her own schedule?
- Cultural values: What values does the organization want its leaders to embody? Is your work fast-paced, relational, service oriented, needs-based?
- Relevant experience: What past experiences are necessary to this role? Sometimes a candidate must have certain personal experiences to understand the role.
- Temperament and personal qualities: Is there a personality component to success in this role? Does the role need a charismatic personality, a quiet listener, a networker?
- Necessary skills: What specifically does the role require that is nonnegotiable? (Is writing or public speaking essential, for example?)

The Individual Considerations

WILLINGNESS—*Is the candidate willing to do the work of leading?*

- Desire: Does he or she want the challenges of leadership? Not all who seek leadership roles truly understand what comes with it.
- Energy: Is the person willing to put in the time and energy required to lead well? Leading is different than doing the work itself, but often a leader does both. Energy is essential.
- Openness: Is he or she willing to learn from the team, the boss, and peers? Is the person teachable and willing to change behavior when given good reason?
- Courage: Is the person willing to face tough times and tough people? Times of testing are part of the deal.
- Resilience: Is the person willing to give it his or her best effort every day? Will he or she put yesterday in perspective and face today as a new opportunity?

CAPACITY—*Is the candidate actually suited to leadership?*

- Emotional intelligence: Is this the right time for the person to take on this role, or does he or she need more seasoning?
- Deportment: Does the candidate present himself or herself well to every audience with whom he or she will interact? Does the person carry him- or herself in a way that brings credibility to the work, or does he or she present an unnecessary obstacle? (Example: Does the person have reasonable manners, dress appropriately for the situation, grasp the social cues around them, etc.?)
- Organization: Is there a real capacity to balance tasks, time, people, budgets, materials, goals, and reports? Demands present challenges, and a leader must be able to balance them without excuses.
- Learning channel: Is the person a learner, aware of how he or she learns best? Does the candidate demonstrate a history of intellectual, emotional, and professional growth? Does he or she know how to “feed” him- or herself in this regard?
- Adaptability: Can the person navigate changing situations and maintain balance? In an ever-changing world, how well can he or she deal with interruptions, complaints, crises, and human weakness, and still keep the team on task?
- Communication: Does the person understand the value of clarity, and can he or she achieve it? Is the person a proactive communicator who can develop people and build teams using clear and honest communication?

PRIMARY RESPONSIBILITY: LEAD

Motivate Tool

- 1) Across the top of the chart below, write the names of those who look to you for some level of leadership.
- 2) Make your best educated guess at what motivates or energizes these three people; put a check in the corresponding box(es) along with your reasoning.
- 3) Now, validate your assumptions through observation and conversation, and then fill in the boxes in the corresponding rows of the chart. We suggest that you ask the people directly what they feel are their two top motivators.
- 4) In the final row of the chart, write down specific ways that you could energize each person by tapping into their motivations.

	Name 1:	Name 2:	Name 3:
Rewards			
Consequences			
Security			
Appreciation			
Empowerment			
Development			
Purpose			
Competition			
Validate and apply your assumptions and then fill in the next two rows			

Observation			
Conversation			
Act on what you've discovered.			
Way(s) to Energize This Person According to His/Her Motivator(s)			

ACTION POINT: How could you develop the habit of knowing and utilizing your people's primary motivations?

PRIMARY RESPONSIBILITY: LEAD

Manage Tool #1

- 1) Self-evaluation: Rate your perception of your current effectiveness in four areas of the Operational Aspect of Manage. Use numbers 1–5 (filling them in in the “Score” column), where 1 = never true of myself, 2 = rarely true of myself, 3 = at times true of myself, 4 = usually true of myself, and 5 = always true of myself.
- 2) In the column on the far right, considering your scores, explain how your management skills in planning, organizing, guiding, and assessing have an impact on your overall leadership.
- 3) If possible, have a conversation with someone to verify your self-evaluation and thoughts concerning your managing abilities. It may be valuable for you to seek the input of others through a 360-degree review or a coach.

Planning		
	Score	How is this having an impact on your leadership?
I have a good understanding of our goals, and I can clearly articulate them to others.		
I perceive what steps are needed to get from the present situation to a desired goal.		
I review my active plans weekly to mark progress and make adjustments.		
Those involved in a project with me know where we started, where we are, and where we are headed.		
I am comfortable adjusting my plans according to unforeseen circumstances that arise.		
I think of potential actions in terms of being (1) surely doable, (2) possibly doable with certain caveats, or (3) impossible now because of certain reasons.		
Organizing		
When I divide work among people, I try to ensure that no one is bored or overworked.		
My direct reports clearly know what their roles are and are familiar with the roles of the others on the team.		

<p>My calendar shows that I have organized my time, giving priority to the strategic needs of each day.</p>		
<p>I regularly have team meetings with an agenda that I have prepared ahead of time.</p>		
<p>My schedule and calendar are organized so that I know today's agenda and am confident to reschedule in the moment if needed.</p>		
<p>I respond to correspondence in a manner that does not require those important to me to remind me or resend.</p>		
<p>Guiding</p>		
<p>I clearly understand the job description (role) of each of my direct reports and how I expect that role to be executed.</p>		
<p>My direct reports clearly understand their job descriptions and how I expect them to be executed.</p>		
<p>I have a plan to spend time with and observe my direct reports, and I follow my plan.</p>		
<p>I know the personality type of each of my direct reports so that when I give feedback, it is personalized with the greatest chance of being well received.</p>		
<p>I am approachable and available to those who need to contact me for important issues.</p>		
<p>I spend enough time with my direct reports to allow me to evenly compliment and correct them.</p>		
<p>Assessing</p>		
<p>I understand and appropriately use an assessment system (e.g., job descriptions, periodic reports, performance reviews).</p>		
<p>When I sense when my direct reports are bored, frustrated, or overworked, I speak as transparently as I can with them about expectations and adjust as I am able.</p>		

My direct reports and I meet for regular performance checks in addition to required performance reviews.	
When I hear that one of my people may have conflicting thoughts with our plans, I first take time to observe and listen directly to them.	
I see progress made with the recommendations that I make to my direct reports during our interactions.	
I would not remove or transfer a direct report without first implementing a plan with him or her to develop the person to the expected level.	

ACTION POINT: Write down one step you are determined to accomplish after doing this exercise.

PRIMARY RESPONSIBILITY: LEAD

Manage Tool #2 **(Leverage and Develop Management Planning Tool)**

- 1) Consider how you can leverage each management skill (planning, organizing, guiding, and assessing) in your current and future leadership. From the previous tool, pick a self-assessment statement from each skill area in which you scored yourself highly, and write how you can leverage it to strengthen your management.
- 2) Consider how you need to grow in the four management skills to enhance your current and future leadership. From the previous tool, pick a self-assessment statement from each area in which you scored yourself the lowest, and briefly describe how you could improve and grow in that area to strengthen your management.

	Planning	Organizing	Guiding	Assessing
Strength to leverage				
Growth needed				

ACTION POINT: Write one step you are determined to accomplish after doing this exercise.

PRIMARY RESPONSIBILITY: DEVELOP

Development Matrix Tool
(Blends the Teach, Model, and Coach Operational Aspects)

You should develop those you lead on the basis of three things: (1) what is required of them—according to what they have been asked to do; (2) what you observe in them—according to their thinking, behavior, and skills; and (3) what they observe in themselves—according to their goals, aspirations and experiences.

- 1) Consider those you lead. Pick one person and brainstorm about the question, “How does that person need to develop to succeed?” Then write your ideas in the top box of the appropriate column.
- 2) Pick one idea from each of the three boxes you just filled in, and decide how you will teach, model, and coach that person in that idea.
- 3) Once that idea is developed in him or her, choose another idea from the top box and repeat step two. Do this for several or all people you lead.

Name:		Situation:		Timeframe:	
	Thinking	Behavior		Skills	
What he/she needs to succeed. →					
How I can help. ↓					
Teach					
Model					
Coach					

ACTION POINT: When will you review your plans with them?

PRIMARY RESPONSIBILITY: DEVELOP

Coach Tool #1
(Developmental Dialogue Using DRESSCODES)

Use the following acrostic as a guide for intentionally coaching and developing those you lead.

AREAS	POSSIBLE QUESTIONS TO ASK
D escribe	Begin with an event, conversation, effort, or situation. "Tell me about the ____ you had last week. How did it go?" Describe it.
R ole	What was your part or role in that? What were you responsible for? Describe it.
E xpectation	What was your desired outcome as you began this experience? What were you hoping would happen?
S uccess	What went well? Why? Identify and discuss each part. What factors and people influenced that? What did you do to influence the good result?
S urprise	What surprised you? Why?
C hange	What would you do differently if you could go back and start again? Why?
O bservation	What did you observe about yourself as you went through this experience? How did you respond? What did you see in your leadership? . . . in your emotions? . . . in how you relate to others?
D evelopment	In what areas do you sense the need to grow or develop in your leadership? . . . in your skills? . . . in your relationships?
E xecution	How do you plan to do that? What are the next steps?
S hare	Can I share a thought? (This is where you give them some input. Be selective and keep your remarks to just one or two things that you think will make the most difference.)

PRIMARY RESPONSIBILITY: DEVELOP

Coach Tool #1
(Developmental Dialogue Using COACH)

Another tool for establishing a Developmental Dialogue uses the acronym COACH (explained in the chart below). Use this chart as a guide for ongoing coaching and development of those you lead. (Note: I recommend this tool for going more in-depth after initially using DRESSCODES—Coach Tool #2.)

<u>C</u> ONCERN	<u>O</u> BSERVATION	<u>A</u> CTION	<u>C</u> APACITATE	<u>H</u> ANDSHAKE
<i>Establish Goals</i>	<i>Promote Discovery</i>	<i>Plan the Action</i>	<i>Authorize & Empower</i>	<i>Recap</i>
<p>Establish Goals for the Conversation</p> <ul style="list-style-type: none"> • How would you like to use our time together today? • How will you know we've accomplished that? • What is our starting point? • Where do you want to end up? • What outcome would you like from our time together? • From your point of view, what is the present situation? • Where do you want to go? <p><u>To narrow the focus:</u></p> <ul style="list-style-type: none"> • What is most urgent or important right now? • What would you like to see change? • Of the issues you raised, which is your top priority? <p>Establish Goals for the Long Term</p> <ul style="list-style-type: none"> • What are your long-term career aspirations? • What are some of your long-term personal aspirations? • How do these aspirations fit into your stage of life? • What legacy do you want to leave in your current role? 	<ul style="list-style-type: none"> • What advantage is there to taking a look at this? • What have you tried and how did it make you feel? • How has this worked for you in the past? • What piece have you experimented with? • How have others responded? • When has it felt right? • What have you seen work for others? • What has challenged you the most about this? • Tell me more . . . • What groundwork have you done? • How is that important to you? <p>Types of Questions</p> <ul style="list-style-type: none"> • Observation: Who, What, When, Where? • Interpretation: What does it mean? • Correlation: Where else have we seen this? What else relates to this? • Application: What does this mean to you? 	<ul style="list-style-type: none"> • What needs to happen? • What do you need to do to achieve your goal? • What might you try? • How else might you get to the same place? • What might happen if you explore this possibility? • What are the pluses and minuses of this approach? • How would this action contribute to achieving your goal? • What will it cost if you don't do this? • Who do you need to talk to? • Who can help you? • What is the most important thing for you to do this week? • What is the most pivotal action you could take? <p>Defining Limits of Authority</p> <ul style="list-style-type: none"> • Who is accountable for the successful completion of the project? • What is the scope of the project? <p>Establishing Checkpoints</p> <ul style="list-style-type: none"> • How often will you meet? 	<ul style="list-style-type: none"> • What will be the most difficult part? • Who do you have to be for this to happen? • How will you take care of yourself? • How will others respond? • How could you sabotage yourself? • Do you need to revise any of this? • Is this a realistic deadline? • Who do you need to include or tell about this? • Who would you like me to talk to? • Who else do you need for this to happen? • What resources will you need? • What support do you need from me? • What else do you need to be successful? • What are the roadblocks you expect or need to plan for? • Are there other things that would have to change for this to happen? • What if you run into trouble? 	<p>Looking Back</p> <ul style="list-style-type: none"> • What did you get out of our conversation today that you needed? • What are you going away with today? • What was valuable today? • Did we accomplish what you wanted to today? • What commitments were made? • What did you learn today? • What was decided? <p>Looking Forward</p> <ul style="list-style-type: none"> • What are you committing to do this week? • Can you check in by email and tell how it went? • What support do you need from me? • Is there anything that came up today that you want to be sure we give time to next week? • For our next meeting, what date and time will work for you? • Has anything else come to mind?

<u>C</u> ONCERN	<u>O</u> BSERVATION	<u>A</u> CTION	<u>C</u> APACITATE	<u>H</u> ANDSHAKE
<i>Establish Goals</i>	<i>Promote Discovery</i>	<i>Plan the Action</i>	<i>Authorize & Empower</i>	<i>Recap</i>
<p><u>Top 12 Discovery Questions</u></p> <ul style="list-style-type: none"> • What do you want to have happen? • Say more about . . . • What have you already tried? • What are the reasons this didn't work as well as you had hoped? • How did you feel about this? • What is your point of view? • What are some other choices or options? • What has worked for you in the past? • What do you think is the most important thing to do here? • What needs to happen in order for you to . . . ? • How do you want to handle this? • What is stopping you from moving ahead now? 		<ul style="list-style-type: none"> • What type of progress report is needed? • Is this a realistic deadline? • What are you committing to do this week? <p>Clarifying Expectations</p> <ul style="list-style-type: none"> • What are the desired outcomes? • What level of accuracy or completeness is expected? • What requirements need to be met? 	<p><u>Questions When You're Stuck</u></p> <ul style="list-style-type: none"> • What are some things you have wanted to try but haven't? • What would you do if you had no limitations? • If you could wave a magic wand, what would you make happen? • What have I forgotten to ask you? • If you were the coach, what would you ask yourself? • If you don't know, who would know? • In the next two years, what is the most pressing challenge or opportunity you face? • What is the one change you can make that would have the most impact on your effectiveness as a leader? • What's the most difficult problem you are confronting now? • Is your current strategy/behavior working? 	

PRIMARY RESPONSIBILITY: CARE

Know Tool #1

- 1) Use this tool to determine how you can better know those you lead, in order to lead them better. We suggest you use one form for each person you supervise.
- 2) Fill in the table to the best of your knowledge. Leave blank any boxes that don't apply or that aren't appropriate based on your leadership situation.

Information you can and should know:	
Given name	
Preferred name	
Professional aspiration	
Desired area of development	
Personality type	
Strengths	
Weakness	
Motivators	
Information that may or may not be appropriate for you to know depending on the situation and relationship:	
Birthday	
Hometown	
Hobbies	
Alma mater(s)	

Issues of interest or activism			
Life story			
Skills			
Recreational activities			
Significant other	Name:	Birthday:	Anniversary:
Children	Name(s) and birthdays:		
Other Information			

ACTION POINT: Determine the following two things.

1. How you can better know this person in ways that are comfortable, effective, and appropriate so that you can lead them better?

2. How and where will you confidentially store this information?

PRIMARY RESPONSIBILITY: CARE

Know Tool #2
(Life Stages Chart)³²

- 1) Using this tool, identify which column best fits your life stage as a leader.
- 2) Write out your initial reaction and one further question to the “Critical Question” of your stage’s column.
- 3) Circle all the “Characteristics” from your stage’s column with which you identify.
- 4) Circle one “Danger” that you have noticed in your life from your stage’s column.
- 5) Looking at what you have circled, identify two “Keys” (or create your own) that could help leverage your years in this stage.

LIFE STAGES

NAME OF STAGE	LEARNING	BUILDING	FOCUSING	INVESTING
<i>Critical question</i>	<i>Who am I?</i>	<i>Where is my place?</i>	<i>Why am I here?</i>	<i>How do I finish well and leave a legacy?</i>
CHARACTER-ISTICS	High activity Broad learning Hopeful/anxious Searching/verifying Accomplishing Gathering Self-Oriented Survival	Intense schedule Narrow leading Tyranny of the urgent Driven by expectations Improving Work-oriented Success	Changing schedule Targeted learning Uncertain/weary Second thoughts Contributing>Influencing Purpose-oriented Significance	Focused/looser schedule Selected learning Anxious Accepting my role Influence > Contributing Converging Others-oriented Security
DANGERS	Bad life decisions Not knowing self Pressure to “figure it out” Inadequate ambitions	No life structures Doing overrides Being Incongruency of stress Neglect of relationships	Dabbling Plateauing Change for the sake of change Prioritizing comfort and security	Stop learning and growing Lack of purpose (rolelesses)
KEYS TO SUCCEEDING	Exposure/experience Understanding self	Developing life structures	Clarifying purpose	

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	Faithfulness Mentors Feedback/adjustment Respond–learn–growth	Applying self Stewardship Mentors/Peers Feedback/adjustment Respond–learning–grow	Focusing self Stewardship Mentors/peers Feedback/adjustment Respond-learn-grow	
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ACTION POINT: Adjust your monthly work flow to incorporate your keys to succeeding, and consider using a coach who can help you rethink your thinking and development.

PRIMARY RESPONSIBILITY: CARE

Connect Tool

- 1) Choose someone with whom you wish to connect better.
- 2) Answer the following questions regarding that person.

Person's name:	
What do you know about the person that will help you initiate a conversation with him or her?	
What are some things that you think you have in common with this person?	
What has this person expressed in the past (thoughts, feelings) on which you could follow up in a conversation?	
What are you willing to reveal about yourself that might further your connection with him/her?	
Based on what you know about this person, what day of the week or time of day would be best for conversing together?	

ACTION POINT: Answer the following three questions.

- 1. Where and when will you have the conversation? _____
- 2. What preparation do you need to do before the conversation? _____

- 3. Who will you ask, and how will you instruct him or her, to help you evaluate how well you engage and limit distractions during conversations? _____

PRIMARY RESPONSIBILITY: CARE

Provide Tool

- 1) Think of a team or individual you want to evaluate regarding Provide. Fill in the top row with the applicable information.
- 2) In the “Current actions” column, write down the way you currently provide the things mentioned in each row.
- 3) Determine if your provision is sufficient in each area and indicate this (yes/no) in the next column.
- 4) If what you are providing is *not* sufficient, use the “Changes needed” column to plan changes that will provide the item in sufficient quantity and quality.
- 5) If you can, discuss this chart with someone else; also, as your thinking grows, write any further thoughts in the last column on the right.

Name:		Project/scope:		
How do you provide . . .	Current actions	Sufficient?	Changes needed	Further thoughts
. . . time?				
. . . attention?				
. . . feedback?				
. . . affirmation?				
. . . clarity?				
. . . physical resources?				

... immaterial resources?				
... support?				
... opportunity?				

ACTION POINT: Answer the following five questions.

1. How can you determine what the appropriate level of provision is for this person or team?

2. Are you able to provide appropriately for their success? If not, where can you find assistance?

3. Is there something you are providing that is not helpful or resulting in an overdependence on you?

4. How will you know when you are limiting their development by providing more than you should?

5. When and where will you have a conversation with this person or team to become aligned on the appropriate levels of your provision for them? Note that when you do have this conversation, you may wish to use the items listed in the chart above as bullet points.

PRIMARY RESPONSIBILITY: CARE

Protect Tool

- 1) Think of a team or individual that you want to evaluate regarding Protect. Fill in the information in the first row in the chart accordingly.
- 2) In the first open column, write down the current ways you leverage your role to protect them in a safe context regarding the things mentioned in each row.
- 3) In the next column state if your protection is sufficient.
- 4) If your protection is not sufficient, use the fourth column to plan changes that will protect them sufficiently.
- 5) If you can discuss this with someone else or your thoughts grow, write any further thoughts in the far-right column.

Name:			Project/scope:	
Area in which I leverage my role to provide safety	Means by which I provide this protection	Sufficient?	Changes needed	Further thoughts
A predictable work routine and environment				
A physically healthy work environment				
An emotionally healthy work environment				
Their peers (coworkers)				
My peers (fellow leaders)				

Themselves—their view of themselves				
Themselves—personal well-being (health, family, physical activity, etc.)				
Overall context and organizational dynamics				

ACTION POINT: Answer the following three questions.

1. How can you determine what the appropriate and needed level of protection is for this person or team?

2. Are you able to sufficiently protect them so that they can succeed? If not, where can you find assistance?

3. When and where will you have a conversation with this person or team to become aligned on the appropriate level of your protection of them? You may wish to use the topics listed in the chart as bullet points in your conversation.

For ongoing training in the LDC Leadership Model, please visit www.ldcteam.com.