

LEADER AS	
COACH	1 2 3 4 5

Leader as Coach is a powerful training program that will show you how to get the best performance from your team.



Congratulations!

You've taken the first step in reaching your leadership goals.

This workbook is part of *The Accountable Leader* Program. It is meant to be used in conjunction with the online video series.

Go to <u>www.TheAccountableLeader.com</u> to learn more.

Thank you,

Brian

Brian Moran and Company





MODULE 1 HOLD THEM CAPABLE

LEADERSHIP & ACCOUNTABILITY

"Leadership is all about influence." As a leader, your results are not driven directly by your efforts, they come through your _____, through your

Leadership is all about creating results by _____ others to act. That's why this concept of accountability and holding people capable is so critical and so powerful.

Managers are taught that when someone's not doing what they're supposed to do, they need to hold them _____.

The actions of holding someone accountable are to apply ______ to try and get them to do what we want them to do.

Can you force someone to do something? _____

Forced accountability is not accountability, it's manipulation.

The typical response of being "held accountable"...

•



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CONSEQUENCES

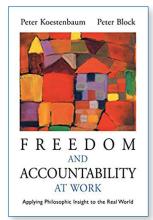
You will never get discretionary _____ with negative consequences. It gets you just enough to stop the consequences ... and comes with collateral damage.

The Consequence Of Managing Through Consequences

- The "volume" on consequences has to _____ up over time.
- People tend to hide to _____ negative consequences.
- _____ and entitlement can grow over time.
- Team attrition the _____ leave & the _____ stay.
- Limits the ______ of people you can manage (PIC/NIC)
- Consequences cannot get you as far as your team is capable.

To really create a high performance culture, you need to understand what accountability is and what it isn't. As we've talked about before, accountability isn't consequences, it's

"We have a small way of thinking about accountability. We think that people want to escape from being accountable. We believe that accountability is something that must be imposed."



Answer Key

Team People Influencing Accountable Negative Consequences No Pushback Resistance Excuses

> Effort Amp Avoid Resentment Accountable Victims Number Ownership

HOLDING YOUR TEAM CAPABLE

If you can't hold them accountable, though, what do you do?

will almost always beat mere

– Norman Ralph Augustine

"Motivation

You hold them _____.

Holding your team capable means that you _____ with _____ and the consequences of their choices.

Confronting With Choice

- Shifts ______ of the consequence dealer away from you.
- Team less concerned that you have an _____.
- Shifts long term _____ of their success to them.
- _____ seek _____ out for help when they need it.
- They see consequences as the outcome of their _____.
- Better vacations for you!

Discretionary effort comes with _____.

Ownership happens when I realize that I have choice.	
Structures Needed To Hold People CapableWhat do they want? What's their?	
• What matters most. That's	
• Are they doing it? That's where comes in.	
 Is it producing? The two critical measures are the tracking of outcomes, but most importantly the scoring of 	
 Are they aligning their time with their plan actions? 	
At the heart of accountability is ownership, and what undergirds that is choice.	
	Answer Key
Start holding your people capable and watch what happens to the results, to the relationships, to the culture.	Capable Confront Choices Burden Agenda
Notes:	Ownership They You
	Choices Ownership
	Vision Planning Process Control Execution Free-Will

IT'S ALL ABOUT THE EXECUTION

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Capture that here.

KEY TAKE-AWAYS

What are your key insights, your key take-aways?

ACTION COMMITMENTS

What will you do different? How will you apply this concept? How will you engage your team?

"A man (person) who wants to lead the orchestra must turn his back on the crowd."

– Max Lucado

APPLICATION

What might get in the way of you successfully acting on your commitments?

How can you increase the odds that you take action anyway?

What are some of your current auto-pilot responses to performance breakdowns that might send mixed messages in your effort to grow as a leader by holding others capable?

In what circumstances do you find that those old "Hold Them Accountable" tendencies occur most often? And what are some potential "Hold Them Capable" responses that you can use? How might you confront with Choice instead of Consequences?

Think through your "typical" week. What opportunities do you have in the normal course of business, that would build individual and team capabilities if you were "confronted" with ownership?

On the next page is an Ownership Conversation Planner that you can use to prepare for those highly leveraged moments where you can build the ownership mindset of your team members.

HOLD THEM CAPABLE PLANNING SHEET

Name of Individual:

Performance Breakdown/Improvement Opportunity: _____

What consequences have you applied in the past to improve this breakdown?

What have been the short-term and long-term outcomes of those actions?

What is the desired outcome you want?

How can you communicate the "standard," and get agreement that their current performance is sub-standard?

What three or four questions can you ask the performer to help them see how to take greater personal ownership of their choices and the consequences of those choices?

1.	
2.	
3.	
4.	

How might they respond to these questions, and how can you respond if they resist ownership?

When specifically, do you intend to conduct the ownership conversation?



LEADERSHIP IS ALL ABOUT INFLUENCE.





MODULE 2 COURGEOUS CONVERSATIONS

CONFRONTING THE TRUTH

Courageous conversations are intentional conversations that confront the _____.

How effectively a team executes relies to a great extent on the _____ of the conversations.

ISSUES:

"Even if

you're on

the right

track,

you'll get

run over

if you

just stand

there."

- Will Rogers

What are some of the fears that may deter you from confronting these issues, and confronting in general:

What are the results of not confronting problems and issues:

Answer Key

Truth Quality

virtually guaranteed if we
is the foundation of leadership.
To get the truth, we have to be to be
CHARACTERISTICS OF COURAGEOUS CONVERSATIONS
: Stay focused on the message and the , and don't be side-tracked by triggers or
another's unwillingness to face the issue.
: These conversations are learning experiences where both parties understand more about each
other's and the underlying truth of the situation.
: Recognize your
accountability in the current situation. This reduces the others defensiveness and role models humility and openness.
: Use questions to help discover individual
perspectives and growth and learning.
: By working through difficult issues, relationships are reconciled and strengthened .
: Ultimately Courageous Conversations are not about making others wrong or highlighting failures,
but are concerned with resolution and moving forward.
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The very outcomes we fear if we _____ someone, are

Answer Key

Confront Don't Courage Willing Uncomfortable Intentional Core Issue Seek Truth Perspectives Acknowledge Personal Contribution **Question Based** Facilitate **Build Relationship Resolution Focused**

COURAGEOUS CONVERSATION MODEL

- 1. NAME THE ISSUE WITH AN EXAMPLE
- 2. IDENTIFY YOUR CONTRIBUTION
- 3. WHAT'S AT STAKE
- 4. DESCRIBE YOUR EMOTIONS
- 5. VOICE DESIRE TO RESOLVE ISSUE
- 6. INQUIRE INTO PARTNER'S VIEWS
- 7. IDENTIFY RESOLUTION
- 8. AGREE ON ACTIONS

COURAGEOUS CONVERSATIONS OPENING STATEMENT:

NAME THE ISSUE WITH AN EXAMPLE:

IDENTIFY YOUR CONTRIBUTION TO THE ISSUE:

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"Courage is being scared to death but saddling up anyway."

- John Wayne

WHAT'S AT STAKE:

DESCRIBE YOUR EMOTIONS:

Confronting is simply a _____

Don't be afraid to _____, the sooner the better.

Courageous Conversations _____ relationships.

"Truth is the only safe ground to stand on."

> – Elizabeth Cady Stanton

> > Answer Key

Conversation Press In Build

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ACTION COMMITMENTS

What will you do different? How will you apply this concept? How will you engage your team?

"One man with courage makes a majority."

> – Andrew Jackson



MODULE 3 PERFORMANCE COACHING PART 1

THE IMPACT OF COACHING

Performance coaching is a fundamental element of effective leadership.

Think of a coach you've had, it could be a parent, teacher, sports coach, or supervisor - answer the following questions:

1. What was the nature of the relationship?

2. How did the coach help you perform better?

Leadership is _____, and Coaching is the to influence.

A study conducted by David Maister from Harvard Business School found a direct correlation between coaching and financial performance.

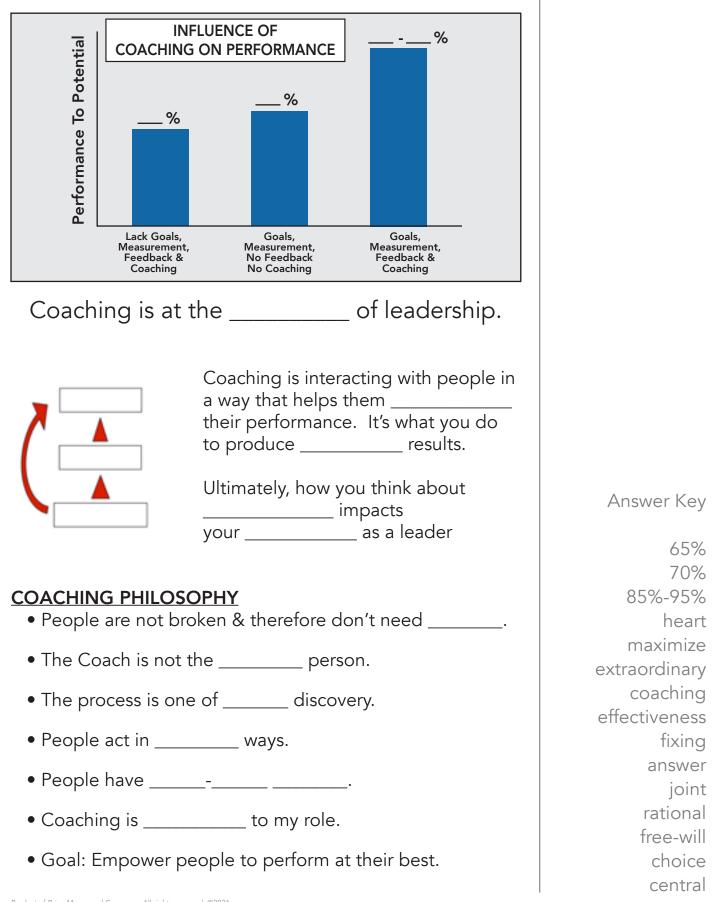
- Financial performance driven by client relationship and employee _____, which is impacted by
- A 1 point increase in coaching on a 6 point scale increases financial performance by _____.
- _____, more than any other factor drives financial performance.

"The greatest danger for most of us is not that our aim is too high and we miss it, but that our aim is too low and we reach it."

– Michelangelo

Answer Key

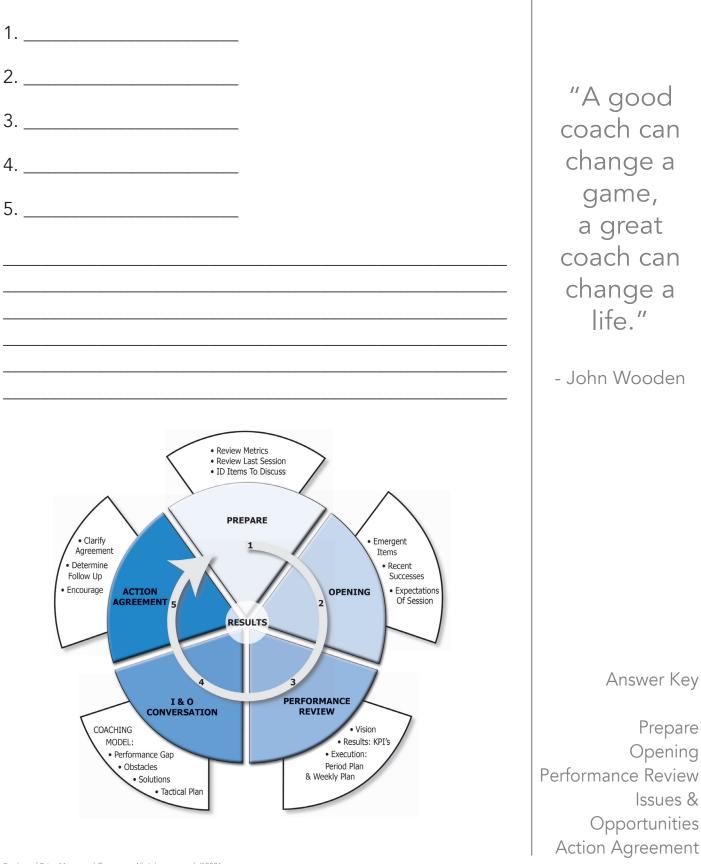
Influence platform satisfaction coaching 17% - 23% Coaching



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	THINKING	
	Gets In The Way	Enables Coaching
"If at first you don't succeed Try doing what your Coach told you to do the first time."	 Coaching is simply	a Conversation.
	4 Levels of Conversation	
	1. S	
	2. O	
	3. F	
Answer Key		
Surface Opinion Fact-Based Purposeful	4. P	

COACHING PROCESS



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Capture that below.

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ACTION COMMITMENTS

What will you do different? How will you apply this concept? How will you engage your team?

"Coaching is the platform to influence others."

- Brian Moran

APPLICATION

This month be especially conscious of the way that you approach the performance-based conversations that you are currently having with your team members:

Notice your thinking, do you think like a coach or is your thinking getting in the way?

- Do you think people need to be fixed, and that you need to fix them?
- Do you think that behavior is sometimes irrational?
- Do you see coaching as central to your role, or as a "nice to have" when you have enough time?
- Do you think that people don't want to be coached?

Begin to work with the Coaching Model, applying the 5 elements of a good coaching session:

- Preparing for each of your coaching sessions effectively?
- Determine your coachee's mindset at the opening of a session, and adjust your approach accordingly?
- Set the stage for an effective session by reviewing recent performance metrics together?
- Jointly explore the issues and opportunities that exist, and get agreement on the biggest area(s) for improvement?
- Get to agreement and ownership of the necessary actions and follow-up before the session ends?

Do your conversations "Move the needle?"

- Are your conversations surface level and opinion based, or are they fact based and purposeful?
- Do you discuss the truth in a given situation so that both parties learn and grow?

Next month we will dig into the coaching model and process in more detail and discuss each of these concepts, but by thinking about them as you lead your team, you will set yourself up to get even more value from next months' leadership module.



MODULE 4 PERFORMANCE COACHING PART 2

THE COACHING PROCESS

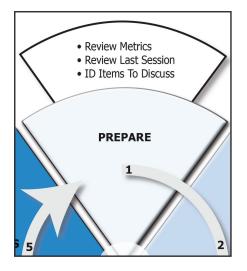
Performance coaching is a fundamental element of effective leadership.

 Review Metrics
 Review Last Session
 ID Items To Discuss PREPARE Clarify Emergent 1 Agree Determine • Recent Follow Up Successes Encourage Expectation
 Of Session OPENING ACTION **COACHING** REEMEN' RESULTS **PROCESS** PERFORMANCE I & O CONVERSATION Vision COACHING MODEL: • Results: KPI's Performance Gap Execution Period Plan
 & Weekly Plan Obstacles Solutions Tactical Plan

Step 1: Prepare

Review

- Review last session
- Identify items to discuss



Answer Key

"Destiny is a

name often

given in

retrospect to

choices

that had

dramatic

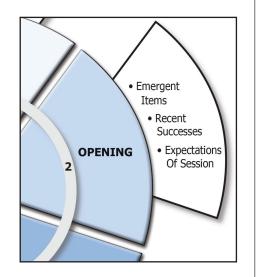
consequences."

– J.K. Rowling

Metrics

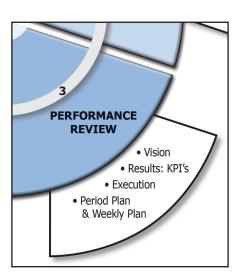
Step 2: Opening

- Emergent items
- Recent _____
- Expectations



Step 3: Performance Review

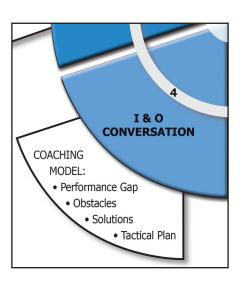
- Vision
- •
- Execution



Step 4: Issues & Opportunities

Coaching Model

- Identify _____ Gap
- Identify Obstacles (see page 4 for Coaching Tools)
- Brainstorm _____
- Build Out Tactical Plan



"Be the coach and mentor you wish you had."

Answer Key

Successes Results Performance Solutions

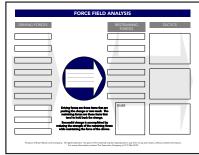
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Performance Coaching Part 2 | The Accountable Leader

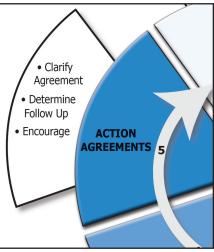
COACHING TOOLS

FORCE FIELD ANALYSIS "The more you help others succeed, the more **OBSTACLE SORTER** you will succeed." – Brian Moran PERFORMANCE ANALYSIS **Step 5: Action Agreement** • Clarify _ Clarify • Determine Follow Up Determine • Encourage Follow Up • Encourage Answer Key



List the obstacles and blocks, and then sort them into three groups:		
1. PERFORMER	Blocks/obstacles that exist in the person	
	- lack of skill, attitude, thinking, low motivation, etc.	
Blocks/obstacles that exist in others		
2. OTHERS	- anxious customer, manager stressed, etc.	
٦	Biocks/obstacles in the situation	
3. SITUATION	- new deadline, inadequate resources, etc.	

EPECTATIONS & ADMEMBENT Does associate know performance is unsatisfactory? Does associate know performance is unsatisfactory? Does associate know what is supposed to be done & when? Does associate thick constribute give is more important?	COMMUNICATION Help Associate Understand
Has associate taken ownership?	
Does associate know how? Does associate think either your way won't work or their way is bette	Show Associate
CONSTRUCTION Des poste consequence follow non-performance? Des negative consequence follow non-performance? Des poste consequence follow non-performance? Des negative consequence follow performance?	Align Consequences
LO REDERION Are there obtaches beyond associate's control? Does associate lack necessary resources? Is associate personally incouples of doing it? No one could of it?	REDESION Remove Obstacle, Transfe Terminate, Redesign Job



Agreement

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EFFECTIVE QUESTIONING

FACTUAL

To get at additional facts To open discussion

EXPLANATORY

To get reasons & explanations To broaden discussion To develop additional info

JUSTIFYING

To challenge old ideas To develop new ideas To get reasoning & proof

LEADING

To introduce a new idea To advance a suggestion of your own

HYPOTHETICAL

To develop new ideas To suggest another opinion To change the course of the discussion

ALTERNATIVE

Compare alternatives To get agreement

AGREEMENT

To develop consensus To get agreement To take action

ACCOUNTABILITY

To confront freedoms To highlight choice To create ownership

ACTION/COMMITMENT

To determine level of commitment To enlist commitment to action Examples:

✓ What, where, why, when, who & how?

Examples:

- ✓ In what way would this help solve the problem?
- \checkmark What other aspects of this should be considered?
- ✓ Just how would this be done?

Examples:

- ✓ Why do you think so?
- ✓ How do you know?
- ✓ What evidence do you have?

Examples:

- ✓ Have you considered. . .?
- ✓ How can you leverage your strengths with this issue?

Examples:

- ✓ What would happen if . . .?
- ✓ Let's assume that . . ?
- ✓ Imagine that . . .?

Examples:

- ✓ Which do you think is best, A or B?
- \checkmark Are we in agreement then to do X?

Examples:

- ✓ Is there general agreement on this plan?
- Based on your understanding, tell me what you believe we are agreeing to?

Examples:

- ✓ What choices do you see available to you?
- \checkmark What is keeping you from owning this?
- \checkmark Are you willing to own this?

Examples:

- \checkmark Can you commit to this action?
- \checkmark What are you willing to commit to?

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KEY TAKE-AWAYS

What are your key insights, your key take-aways?

ACTION COMMITMENTS

What will you do different? How will you apply this concept? How will you engage your team?

coach will make his players see what they can become, rather than what they are."

"A good

– Ara Parseghian

APPLICATION

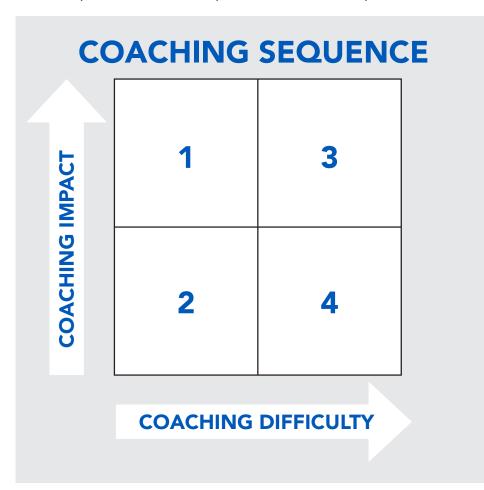
Suggested Coaching Approach

As you begin, we recommend that you identify your least challenging coaching opportunity and start there. Then engage your next easiest opportunity, and then the next easiest, and so on until you are coaching your entire team. In this way, you will hone your skills by becoming comfortable with the model and the process, before tackling your more challenging coaching opportunities.

Preparing to coach:

Map your team members individually on the grid below by placing their initials in the appropriate quadrants based upon the expected impact and difficulty of the issues that you will address in coaching.

Once you have completed the grid, pick someone in quadrant 1 to start with.



Coaching Session 1:

Before the session, review your notes to become familiar with the coaching model and re-watch the Leader As Coach videos if necessary. Create a list of talking points for session 1 and take it with you to the first session with each of your coaching candidates.

Schedule a coaching conversation with one candidate from quadrant 1, and explain that you will be meeting with everyone on your team over the upcoming weeks to help the team, and each individual on the team, to become even more effective than they are.

When you conduct your first session, introduce the coaching model and explain why you are engaging in the coaching process with the team.

Give them a printed copy of the coaching model and review each step so that they can be prepared for each session before hand. As you review each step, explain how you will prepare for future sessions and what they can do to be prepared as well.

Ask them if they have any questions or concerns and address them as best you can. If there are any questions that you cannot answer, tell them that you will get back to them with the answer when you have time to work through it. NOTE: Be sure to get back with them as promised!

At the end of each session, be sure to confirm the date and time of the next session.

After the session take a few minutes to identify ways to improve and incorporate those changes into your approach for the next candidate that you will coach.

Ongoing Coaching Sessions:

Before The Session:

Before each coaching session, decide what outcome you would like from the session, and what you can do to create that outcome. It is a good practice to prepare a few questions that you could ask for each stage of the model. You may not ask all of the questions, and you may ask additional questions, but thinking through some good questions before hand can help keep you from getting stuck.

If there are notes and action commitments from previous coaching sessions, review them and be sure to follow up with them in the upcoming session. If you track performance metrics for the person you will coach, gather them and review them before the session as well.

Decide how much time you will dedicate to each step of the model and create a simple outline with timings of the coaching conversation that you will adhere to as closely as possible in the session.

The people that you coach (and you as the coach), especially in the first few sessions, will likely be somewhat uncomfortable with the process. That means that you may linger on the more comfortable elements of the model so that there is less time available for the uncomfortable ones. Be aware of this human tendency, and decide beforehand how you will overcome the joint desire for avoidance, and how you will gently and quickly get back on track with the coaching agenda.

During The Session:

As you begin the session, keep a printed copy of the model and as you progress through it be sure to elicit participation for the person that you are coaching at each stage. If they are not prepared, either remind them to do so next time, or ask them to go and gather the information needed and wait for them to return before continuing.

Progress through each stage of the model using your prepared notes and questions to guide the discussion. Be sure to maintain a process of joint discovery, and to avoid the "telling" mode. Ask questions to ensure understanding and participation throughout.

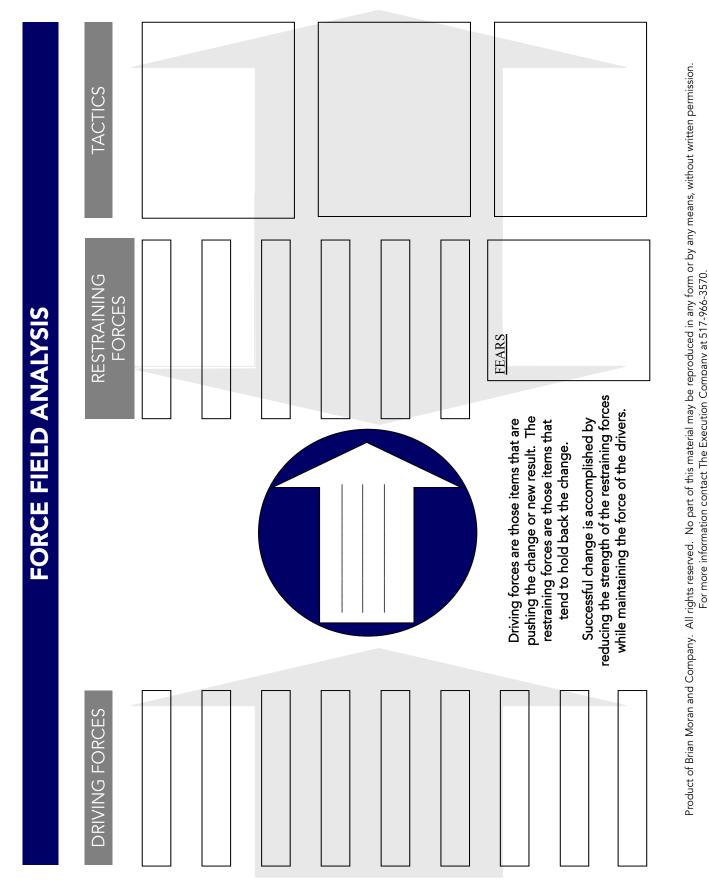
As you work through each stage, ask them to take notes of the agreements and insights that arise from the conversation. You should do the same as well. At the end of the session don't forget to communicate your confidence in them, and also offer your support if they get stuck between sessions.

After The Session:

Put your notes in a file for preparing for the next session. Put any action items for you to follow-up with them before the next session in your calendar.

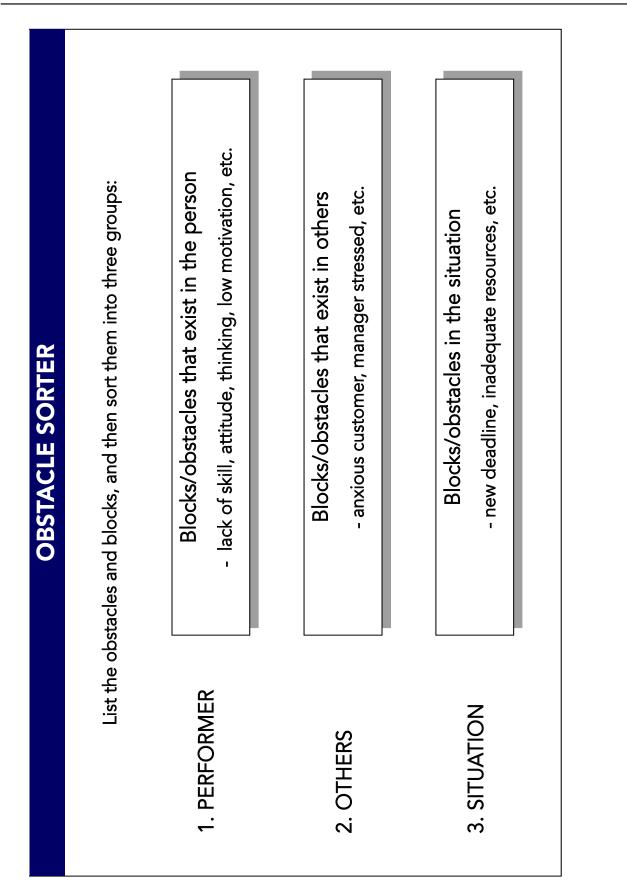
Also, do an after-action review and note any improvements and modifications needed in your coaching approach and put those in your agenda for the next session that you conduct.





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Does associate know what is supposed to be done & when? Does associate think something else is more important? Has associate taken ownership? TRAINING Does associate know how? Does associate think either your way won't work or their way is better?	COMMUNICATION Help Associate Understand TRAIN Show Associate
CONSEQUENCES Does positive consequence follow performance? Does negative consequence follow non-performance? Does positive consequence follow performance? Does negative consequence follow performance?	CONSEQUENCES Align Consequences
JOB REDESIGN Are there obstacles beyond associate's control? Does associate lack necessary resources? Is associate personally incapable of doing it? No one could do it?	REDESIGN Remove Obstacle, Transfer, Terminate, Redesign Job



MODULE 5 DEVELOPING TALENT

DEVELOPING TALENT

The Importance Of Talent

People are not your most important _____, the "Every _____ people are. business The ultimate throttle on ______ is not markets, or is a people technology, or competition, or products. It is the ability to get and keep enough of the right _____. business." Survey On Talent - 72% of those surveyed agreed that it is critical for their companies to _____ and _____ talent. Answer Key - _____ agreed they Hire Highly Talented People Asset Right - _____ said they Develop People Effectively Growth People - _____ said they Retain High Performers Attract Retain - _____ Remove Low Performers THE OLD WAY THE NEW WAY All _____, starting with the ____, are Managers accountable for strengthening their talent pool CEO We provide good _____ and benefits We shape our company, our jobs, even our strategy to _____ to talented people Appeal Recruiting is like _____ Purchasing Recruiting is like _____ Marketing We think development happens in We fuel development primarily through Training _____ programs stretch jobs, _____, and mentoring Coaching We treat _____ the same, and like to think that everyone is equally capable We affirm all our people, but invest Everyone _____ in our A, B, and C players

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19% 3% 8%

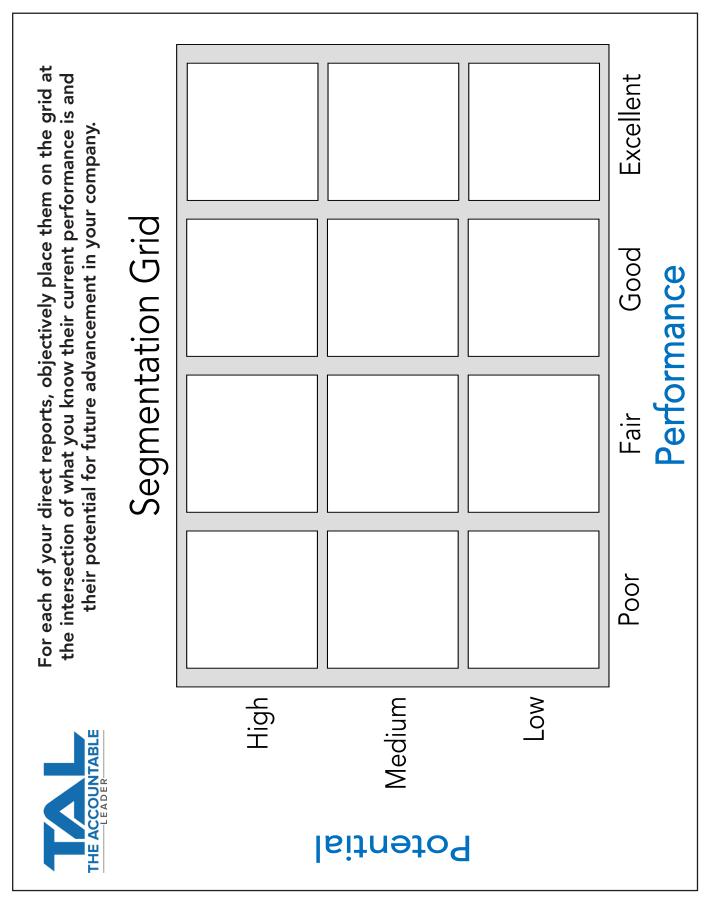
3% HR

Pay

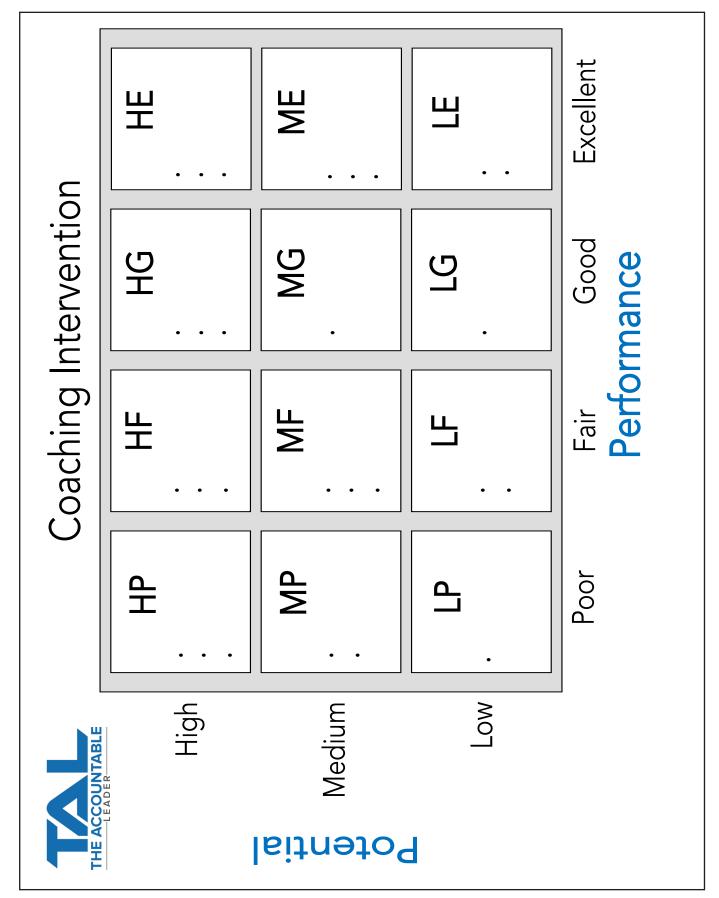
Differently

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	"We treat everyone fairly, but not the same."
"The growth and development of people is the highest calling of leadership."	 A Players Excellent performance, low to high potential Embody the of excellent performance Consistently deliver Results Inspiring others Represent 10% Invest in your A Players, them highly, keep satisfied B Players Solid performers Represent of talent pool Increase of talent pool Increase investment Greatest potential to impact performance
- Harvey S. Firestone Answer Key	<u>C Players</u> - Rarely deliver results - Represent - Can be frustrating - Develop into players - Reassign or outplace the company
Standard	Segmentation Grid
20% Pay 60% 70% Capabilities Appropriate Overall Acceptable 10% 20%	High Medium Low
B Costing	Poor Fair Good Excellent Performance



THE ACCOUNTABLE	To build a successful firm you must develop your people. Rarely does talent arrive fully developed. And yet the average person possesses an enormous amount of potential that when nurtured and challenged can be brought to splendor.	ssful firm yo rely does tal y yet the ave ormous amo ed and chal ndor.	u must develop ent arrive fully erage person bunt of potential lenged can be	It is incumber develop peop within them. Let's begin by	It is incumbent on leadership to cultivate and develop people, bringing out the best that is within them. Let's begin by focusing on your Direct Reports.
DIRECT REPORT	POSITION	SEGMENT A, B, C	FOCUS: 4 Wks. • 8 Wks. • 12 Wks.	/ks. • 12 Wks.	COACHING INTERVENTION
	-		• •		
			• •		
			•		
			•		
			•		
			• •		
			• •		
			•		
			•		



ASSESSING BENCH STRENGTH

In addition to strengthening Direct Reports, a leader has to make certain that talent is being nurtured and developed throughout the orga-nization. A "talent mindset" requires that all managers take responsibility for strengthening their talent pool.

As the depth of talent increases, the organization becomes stronger and more capable with an increased ability to improve and sustain success. Bench strength is critical to the long-term success of your organization. Let's assess your bench strength.

POSITION: CURRENT TALENT:	BENCH STRENGTH: •
	•
POSITION: CURRENT TALENT:	BENCH STRENGTH: • •

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Capture that below.

KEY TAKE-AWAYS

What are your key insights, your key take-aways?

ACTION COMMITMENTS

What will you do different? How will you apply this concept? How will you engage your team?

"You grow the organization by growing and developing the people."

> - Michael Lennington

APPLICATION

Talent development is one of the most impactful improvement strategies available to leaders seeking to optimize their team's results. According to surveys, most leaders agree with the importance of talent development, yet only a small percentage of those same leaders effectively develop their teams. They key is to act on what you've just learned.

To apply the concepts in this month's training, once you have completed the segmentation and the development plans, there are two key actions that remain.

First, meet with each of your direct reports to discuss their development plans. Second, if you are using the 12 Week Year, be sure to add the tactics from the Coaching Interventions in your 12 Week Plan.

That's it! Remember that your (effective) people are your most important assets.



Congratulations on completing Leader As Coach!

As you no doubt are aware, knowing is not enough.

Execution is what makes the difference. The Leader As Coach concepts are powerful and proven.

Like anything new, you will need to work with them to align your thinking and build your skill. Come back to your notes and revisit the videos during the months ahead.

Your commitment to improve as a leader will serve both you and those you lead – keep climbing, keep serving.

For more ways you can develop as a leader visit **www.theaccountableleader.com** or **www.12weekyear.com**.

Be Encouraged,

Brian