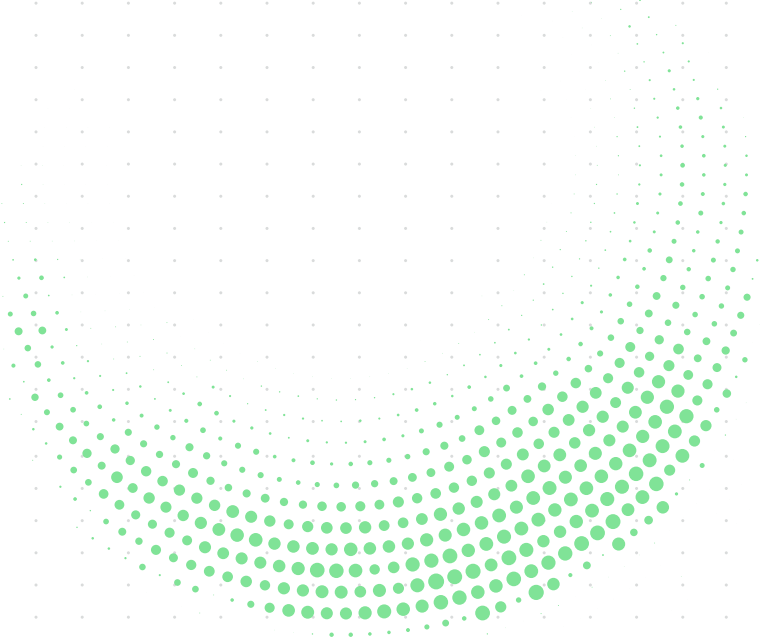


VOL. 1

4 WEEK GUIDE

Small Progress **Continuous Growth.**

*Better people development
in the workplace.*



Welcome Leader,

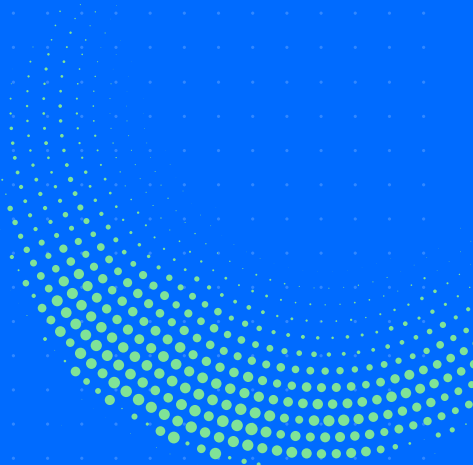
As a 29-year old manager of 130 employees, I learned the value of the top performer. One employee, in particular, stood out to me. He had a will to improve, a connection to the mission and empathy for our customers. I knew if I had 50 more people like this we would win.

I began to try and screen for these intrinsic qualities in the interview process. Yet, even with an updated hiring process and an idea of the qualities which made for a high-impact employee, I kept getting disappointed. I would assume the best but only succeed with one out of 10 hires. The other nine were decent team members, yet they weren't yearning to grow or improve and this lack of desire hurt the business. We needed innovation and engagement from all levels and never got it from most of the staff.

When I think about an audacious problem worth solving, I think about the 90% I could never seem to reach consistently.

At Leadr we're building a new kind of people management software that empowers managers with the tools they need to develop leaders at all levels of the organization.

Could the right people management software change the culture of an organization by engaging with the 90%? We're going to find out.



The purpose of this guide is to help you implement a leadership development model which actually drives sustained, progressive, and measurable employee growth.

The model, based on continuous improvement principles, provides a framework to help your team make small progress every day, leading to continuous growth and cultural transformation.

The standard of success is bold: continuous growth for every employee. The measurement of success is no less ambitious: progressively better outcomes and engagement from every employee.

Fear not though, we will walk you through a series of tangible steps designed to bridge the gap. We call these steps our Path to Progress:

- Determine the standards
- Establish a baseline
- Assess and gather feedback
- Deliver customized learning

- Apply coaching as learning is put into practice
- Track progress and reassess
- Adjust plan according to results

Just as we've grown accustomed to using project management tools to help us better execute on tasks, we'll be introducing you to people management tools, which deliver far more effective and steady results than traditional consultants, books or conferences.

Lasting and impactful change doesn't happen overnight, but it can begin to happen over the next four weeks.

Our hope is this kicks off a culture of continuous improvement in your organization.

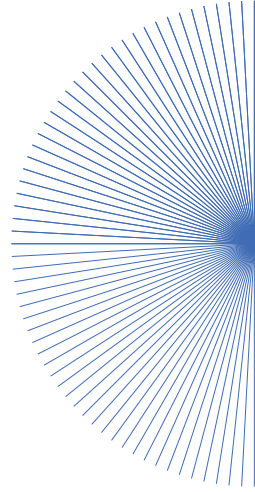
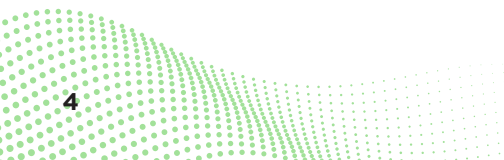
What will you be able to accomplish when every one of your employees is growing?

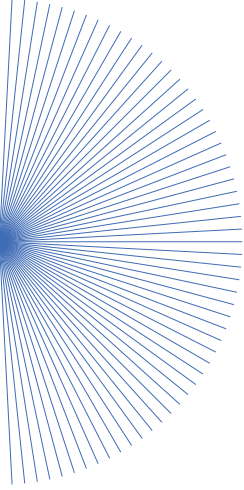


Matt Tresidder
Co-Founder, Leadr

Sometimes change requires a **new** **perspective**

Let's turn things sideways





Week One

- Take the **self-assessment**
- Determine **cultural and capability** standards
- **Communicate** to your team about the program
- **Schedule 1:1s** with each member of your team*
- Have employees take **self-assessment**

Week Two

- **Conduct 1:1s** with each member of your team*
- Choose tools for managing **assessment results***
- Choose tools for tracking and **gathering feedback***
- Create library of **learning content***

Week Three

- Create library of **discussion questions** in order to gather feedback from employees*
- Draft initial **coaching plan** for each employee
- **Set agenda** and discussion questions for this week's 1:1s*
- **Conduct 1:1s***

Week Four

- Retake self-assessment and **compare results**
- Conduct 1:1s*
- Deliver customized learning and **apply the first round of coaching** to each employee*

*Task can be done in Leadr

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Section 1

Assessment

“Challenging, real-life experiences are rich sources of growth and learning, but you don’t have to wait for opportunities to present themselves.”

CCL’s Cynthia McCauley.

“You can — and should — be proactive and seek them out.”

Assessment:

Key Tasks

- Define standards
- Establish baseline

At a Glance

Right from the beginning, we need to stop and define your organization's standards. Why? Because in order to lead effectively, you must have a destination. To say to your team, "More, less, better or increased," naturally begs the response, "Of what, and according to who?" In essence, they are asking you for clarity on how to hit the target. These standards will be the measurement categories you'll be using to track the growth of your team.

We view standards in two primary categories:

1. Capability

2. Culture

What is it? | Key Definitions

Capability standards:

The tangible and tactical skills needed to accomplish the items on your to-do list. These are often unique to each role, however, some can be shared across an entire department or organization.

Cultural standards:

The way or how in which you operate. The non-negotiable standards of practice for your employees. Think of these as virtues, characteristics and the more intangible qualities of how each person conducts themselves.

Assessments:

A way to measure proficiency in a subject. Capability standard assessments are easier to measure (*For example, take this test of your knowledge on Powerpoint*) while cultural standard assessments require more reflection and nuance (*For example, on a scale of 1-10 how humble are you?*).

Why are standards and assessments important?

Before you can measure growth or create a path toward progress; you first and foremost must know where you currently stand. We call this establishing the baseline. You'll want to do this for every member of your team, including yourself.

It is impossible to establish a baseline, however, until we have defined both our cultural and capability standards. Without these, we have nothing to measure against. In other words, without a clear and defined playing field, it becomes hard for players to play the game or know if they are performing well.

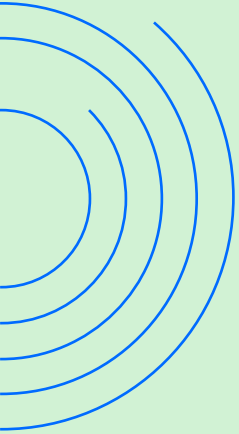
When was the last time you assessed new managers on their empathy before allowing them to start leading others? Or, when was the last time you assessed your own leadership skills?

While this kind of measurement can feel vulnerable at first, we believe over time it creates a culture of transparency and progress.

When new employees see that every person in the organization, regardless of seniority, continues to look honestly at themselves in the mirror, and invites others to do the same, this makes a powerful statement about progress over perfection.

Furthermore, when you constantly monitor growth and apply learning as needed to ensure continuous improvement, progressing towards individual and organizational goals becomes easier and more predictable.

While it's common to know and focus on where we want to be, it isn't until we understand our right now and then our how to get there, that progress begins to happen.



For next steps, we're going to walk you through a few exercises to help you define your standards and then establish your baseline.

We recommend taking the time to complete each assessment before moving on in the book.

- Define cultural standards
- Define capability standards
- Take leadership cultivation assessment
- Take leadership capability assessment

Next Steps

Assessment

Define Cultural Standards

It's time to write down your organization's unique culture standards.

Here are some ideas:

- Learning
- Innovative
- Friendly
- Collaborative
- Transparent
- Commitment
- Loyalty
- Mission-driven
- Empowering
- Profitability
- Dynamic
- Enjoyment
- Intense
- Aggressive
- Inspirational
- Purpose
- Excellent
- Trustworthy
- Risk-taking
- Caring
- Development
- Efficient
- Competitive,
- Vulnerable
- Agility
- Consistent
- Approachable
- Winning

Once defined, make sure to put them into practice:

- Use them to guide your day-to-day leadership and decision making
- Communicate and teach them to staff
- Assess each member of your team according to them, putting together a path toward progress for any areas of weakness
- Build these words into job descriptions, hiring practices, and every area of your business you possibly can

Write them down here:

**“Culture eats
strategy for
breakfast.”**

- Peter Drucker



Assessment **Capability Standards**

Next, record the capability standards for each member of your team.

Most likely, there will be some overlap, and then distinct skill sets for each person.

Refer back to their job description for ideas, or better yet, ask them to help you by making a list of what they see as the tactical skills they need to accomplish the items on their to-do list.

Each capability will have its own type of external assessment, or you may prefer to do your own assessment for each employee.

Either way, make sure to establish a baseline in order to help each team member develop their skills and make measurable progress.

Once you have both the list and the assessments documented, store the findings in a place where both you and the employee can refer back to it during your 1:1's. A tool like Leadr works great for this.

Assessment

The Leadership Cultivation Assessment

Finally, a quick exercise using the standards you've just defined from Justin Bronson, founder of Citizen + Co.

At a Glance

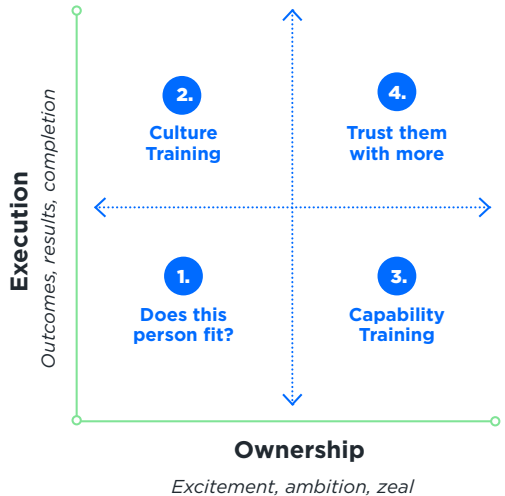
Justin suggests leadership development happens when we, "build a culture of shared ownership and collective accountability around outcomes." This falls right into line with our two standard categories.

Shared ownership = cultural alignment.

Collective accountability = capability alignment.

How to Use It

Use this grid to identify where each member of your team falls on the x and y axes, based on your assessment of them in the areas of execution and ownership. Once you know where they live on the diagram, it helps you to know what are the best next steps for the good of their development and the advancement of your brand.



To help you in your assessment, here are some sample descriptions of the types of employees in each of the grids above.

Grid #1:

Perhaps someone on your team doesn't seem excited about their work and every week you have to follow up with them on their projects. When they finally complete their work, it's apparent they aren't producing excellent results.

The question you want to ask yourself is do they fit here?

Grid #2:

Another direct report may be great at execution and gets excellent work completed on time, but bulldozes over their team members in the process.

The next step for this person is culture standards training.

Grid #3:

This person has great engagement with their work and team, and people enjoy working with them, but deadlines consistently get missed.

This person needs capability training so their work outcomes can match their cultural zeal.

Grid #4:

Perhaps this person continues to lead your team with culture, attitude, and zeal. They also take ownership of projects and you can delegate many duties to them and trust they will complete to the organization's standards.

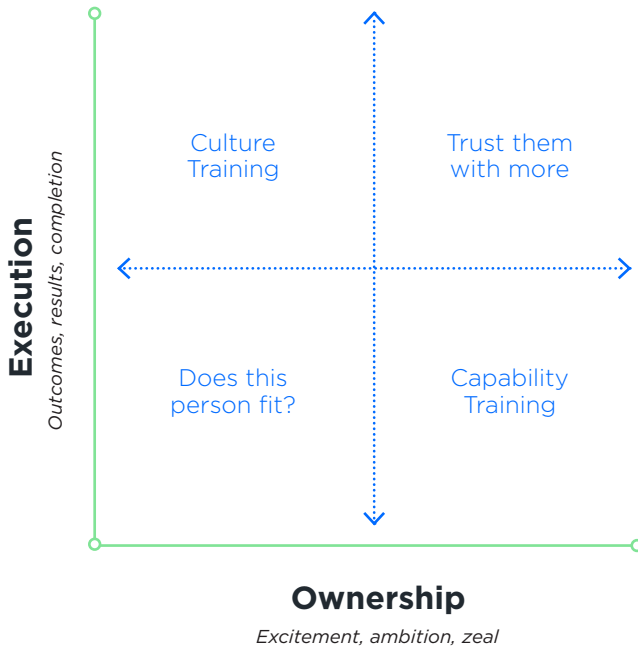
This person is ready to be trusted with more.

Take the assessment:

It's time to assess where you personally land on this graph.

- Place a sticker or mark on the grid you feel best describes you.
- Now, place one sticker or mark on the graph for each member of your team.

Make this assessment a topic of conversation during your next one on one. Come prepared with practical examples to back up your decision.



Assessment

Leadership Capability Assessment

At a Glance

Leaders set an example by taking the first step. As you roll out a new development culture in your organization, we encourage you - start with yourself.

The Leadership Capability Assessment is designed to gauge your leadership health. Perhaps you are just starting out in your role, or maybe you're seasoned; either way, take this time to honestly assess where you are currently operating at.

How to Use It

No one is going to look at your results, this is for your benefit. The assessment today will establish your baseline. We will test you again at the end of four weeks to uncover the progress you've made.

You'll be taking two tests - the first assesses on a yes/no scale, while the second asks you to gauge on a scale of 1-10.



When issues and concerns come up, I proactively deal with them, even if it involves conflict or uncomfortable conversations.

Yes / No

I encourage teamwork and collaboration on my team and back my words up by demonstrating the practice myself.

Yes / No

I applaud excellent performance and give proper feedback when needed, tailored to the personality style of the person being recognized.

Yes / No

My staff would describe me as a person who follows through on the commitments I make.

Yes / No

I empower each person on my team with delegation while also investing in them with my time and the organization's development resources.

Yes / No

I am comfortable admitting and correcting my mistakes, even in front of the entire team when necessary.

Yes / No

I am consistent in conducting weekly 1:1 meetings with my direct reports and rarely cancel or re-schedule them.

Yes / No

I am confident my team trusts me and knows I have their back. This is seen by them sharing sensitive information or raw challenges they are facing.

Yes / No

I believe leaders must be learners who continuously develop and never arrive. This includes me.

Yes / No

My team talks to me rather than around me.

Yes / No

I see people development as a primary responsibility of mine and make it a focus on where I spend my time.

Yes / No

I create unique development plans for each person on my team, setting personalized goals with them and tracking their progress over time.

Yes / No

I make it a priority to put people on projects and tasks which utilize their core strengths.

Yes / No

I am a safe person to give direct feedback to. My first response is gratitude, not a defense mechanism.

Yes / No

I am optimistic overall, and keep my team thinking positive when problems come. I have a long term vision for my people, my department and this organization, which keeps my team hopeful for the future, even when set-backs happen.

Yes / No

I understand my leadership blind spots and actively work to improve them. In fact, I could list out one area of weakness right now I'm actively working on.

Yes / No

Add up all your "YES" answers

Total them here: _____ /16

Rate on a scale of 1-10

I value the integrity and character of myself and others as more important than tangible work output. In fact, I make a point to hire, promote and recognize those with strong character rather than just focusing on talented individuals who can get the job done.



I am open to making changes in my behavior when necessary.



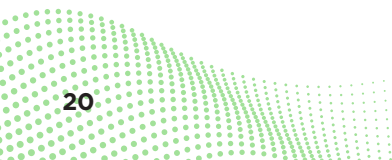
Diversity of thought and experiences and inclusion of a variety of voices are important to me. I could look around the table at my core team right now and see diversity and inclusion, rather than simply duplication of the same perspective.



I enjoy listening to other team member's ideas, choosing their idea over my own on a regular basis.



When a team member is upset, I try to understand and empathize with what they are going through rather than getting annoyed or seeing their pain as an inconvenience.



I enjoy surrounding myself with smarter people to collectively gain organizational success.



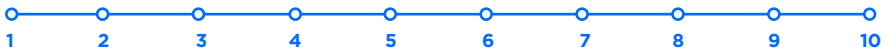
I lead from a place of vulnerability and encourage my team to do the same. This may include revealing areas of weakness, asking for help, or welcoming critical feedback.



My team considers me consistent in my demeanor, attitude, and values. I don't have days where they know it's best to avoid asking me for anything.



I am enthusiastic about the mission of our organization and spread excitement across my team.



I hold myself accountable to our organization's culture, and hold my team accountable as well.



I welcome healthy conflict, knowing it can reveal root issues, lead the team to a better idea, and bring people closer together.



I make time for people even when it doesn't personally benefit me. I rarely use the phrase, "Sorry, it's just such a busy time right now."



Add up all your answers and total them here: _____/120



Assessment Moving Forward

What was your first reaction to the results of your assessment?

“The purposes of self-assessment are to identify areas of strength and weakness in one’s work in order to make improvements and promote learning.”

- Andrade, H. & Valtcheva A. (2009).



Keep in mind, the starting scores are less important than the ability you now have to track progress. With an established baseline, once you complete your next four weeks and retake the assessments, you’ll be

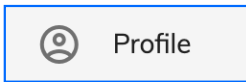
able to clearly see how your scores improved. This is what we define as development and it’s a great feeling we want you and every member of your team to get used to.

Let’s jump in.

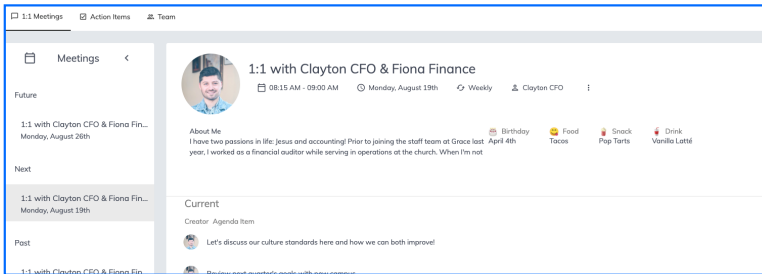
Assessment How Leadr Helps

- Log back into Leadr at app.leadr.com

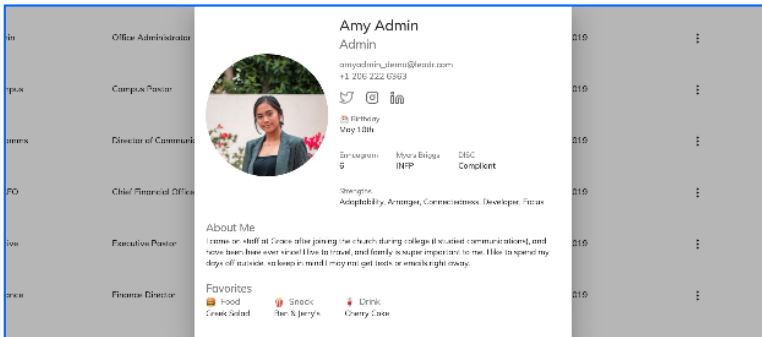
For those of you who use Leadr, take time to create profiles for each member of your team and schedule your first round of 1:1 meetings.



Create your own profile and fill in your baseball card.



Create a profile for each employee



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Section 2

Gather Feedback

“Without a good question,
a good answer has no place to go.”

Clayton Christensen



Gather Feedback:

Key Tasks

- Determine your feedback framework
- Choose the tools you will use to collect and manage feedback
- Develop feedback discussion questions
- Organize feedback into categories to keep track of patterns and progress

Since leadership is about continuous improvement, feedback is paramount. Why? Because feedback equals data. As with any system or model, the more data, the more accurate it can become.

The progression towards accuracy comes by using this data to make adjustments, improvements, and modifications. When viewed through this lens, even negative feedback can be received with gratitude. It is your path to continuous improvement.

Toyota used this idea in the 1980s as they built one of the highest-performing assembly lines in the auto industry.

Using a process called, ‘Kaizen,’ they would shut down the assembly line anytime an inefficiency or abnormality was found by a front-line employee. The line stayed shut down until the team rapidly gathered to plan, do, check and act to fix the problem. Over time, these small moments of progress led to continuously better results, until their production line quality grew to be unrivaled.

Sheila Heen and Douglas Stone offer this perspective in the January-February 2014 issue of the Harvard Business Review,

“The [feedback] process strikes at the tension between two core human needs — the need to learn and grow, and the need to be accepted just the way you are.”

In the following pages, we will provide you with a framework to gather feedback about yourself and your team.

What it is? | Key Definitions

Feedback:

Simply put, gathering feedback is the process of collecting data by asking meaningful questions.

360-degree Feedback:

A type of feedback which is gathered up, down, and all around. The goal is to ask those who you encounter often to provide feedback, in order to reveal gaps between your intentions and your impact.

Continuous Feedback:

The practice of building in feedback mechanisms which accommodate both spontaneous and structured information gathering in order to continuously collect data. Continuous feedback cultures rapidly identify areas for improvement in order to progressively make small progress.

Kaizen:

A Japanese continuous improvement philosophy made popular by Toyota in the 1980s which empowers frontline employees to suggest ideas as they find them.

Why is continuous feedback important?

In their research of over 50,000 executives, Jack Zenger and Joseph Folkman found that...

"Leaders who ranked at the top 10% in asking for feedback were rated, on average, at the 86th percentile in overall leadership effectiveness."

The best teams have a culture where consistent, continuous feedback is the norm. Why?

Speed of learning:

"Individuals acquire a skill much more rapidly if they receive feedback about the correctness of what they have done. If incorrect, they need to know the nature of their mistake. It was demonstrated long ago that practice without feedback produces little learning." (Thorndike, 1927)

Diversity of voice:

The next-generation workforce will be a flat hierarchy in terms of the sharing of ideas. Give front-line employees and every staff person a voice by implementing a culture

of continuous feedback. This not only benefits your organization because of the diversity in thought, experience, and ideas, but it leads to a highly-engaged workforce.

Ownership mentality and better engagement:

Once they see the implementation of their idea, it will spur more feedback. An ownership perspective begins to set in as every employee starts to look for and recommend areas for improvement - increasing organizational results, employee motivation and customer satisfaction.

Improved outcomes, decreased costs:

As small progress leads to continuous improvement, positive outcomes grow exponentially. This has a side benefit of decreased opportunity costs because it maximizes the talent of your existing workforce and because small, regular feedback is easier to implement than big, radical changes or shifts.

Gather Feedback

How to Begin

Step One | Ask First

Defining standards may give your team a mild scare. However, the idea of a continuous feedback culture will send many into a panic if they do not feel safe enough to trust one another. If you aren't sure how your team feels, this is a great first question to ask:

“Do you feel safe and trust me enough to provide honest feedback to you, and you, to me?”

Step Two | Create a Framework

In order to protect the trust of your team, put some practices in place to encourage helpful feedback, rather than feedback laced with negativity or passive-aggressive complaining.

A sample framework to guide you:

Specific

Yes: “Rachel, it was difficult to understand your portion of the

presentation in our strategy meeting because you were talking so fast.”

No: “There are so many things that bother me about how you run meetings, Tom.”

Timely

Yes: “Phil, thanks for taking the time to ask how my vacation was this morning, that meant a lot to me!”

No: “Last year you seemed to care more, Susan.”

Meaningful

Yes: “The podcast you shared with our team yesterday was impactful, Michael. Especially the segment on creativity routines. Thanks for including us!”

No: “Ashley, thanks for everything you do.”

Candid

Yes: “Laura, the way you got that project completed was against our culture standards. I value the relationships you have with your teammates, so let's talk through why they felt bulldozed, so you can improve in this area and excel here.”

No: “I think that maybe you could have done better, but it’s not a big deal, John.”

Once you have your framework in place, communicate this to each member of your team in both a group setting and also during that week’s 1:1’s. Make sure to take time to listen and respond to the fears or concerns people on your team may have.

Step Three | Choose your method for gathering feedback

This may be a tool, such as Leadr, or something more manual, such as a suggestion box or open office hours. Ideally, the method will accommodate both spontaneous feedback, as the team experiences a problem in real-time, and structured feedback, such as a weekly survey or structured discussion questions (see Step Four).

The goal is to get your organization as close to continuous as possible with their feedback.

The method for gathering feedback plays a huge role in achieving this goal and making sure every employee is given a voice.

Step Four | Develop a list of feedback discussion questions.

The 1:1 weekly check-in is an ideal place to ask structured feedback questions. Prepare questions in advance for each of these three areas, however, you may touch on only one area each week in order to have time for real conversation:

- **Organizational feedback**
(i.e..“What is one thing we aren’t currently doing, but could be doing to grow the organization?”)
- **Peer feedback**
(i.e..“Who would you like to work more often with? Why?”)
- **Upward feedback**
(i.e..“What is one thing that I could do to help you be more productive?”)
- **Unsure of where to start?**
Use our list of 100 sample questions to get you started:
<https://www.leadr.com/blog/want-better-11s-start-with-these-100-questions>

Gather Feedback

How to Measure Progress

Measuring feedback may feel like drinking from a firehouse at first, so let's break it down into three categories to help you organize the results.

Look for patterns or trends

Criticism is best confirmed from the mouth of two or three witnesses. This principle holds true when collecting feedback as well. Make note of the patterns or trends which appear from multiple sources. Add these items to your priority list.

Measuring progress:

Keep a running tally of the number of feedback items for each pattern area. As you begin to apply coaching, learning and development, track whether the tally goes up or down. Adjust your development plan based on the results.

Hold fast to your organizational standards

Now is the time to apply your cultural standards. Look for feedback which violates any of your core values. This may be in regards to an individual employee's behavior, or about something much larger, such as a strategic decision. You must protect your cultural standards if you want them to mean anything. It's been said that even Enron had an integrity poster on their wall.

Measuring progress:

A quick evaluation can be done by simply measuring the amount of feedback under each cultural standard. Some items can be fixed immediately (such as an out-of-culture business decision). However, since many of your culture standards are qualitative (harder to measure), and involve people, it can be helpful to identify areas for improvement from the feedback, establish a baseline, apply coaching, and then measure progress against the baseline. Adjust your coaching plan based on the results. Quick fixes are easier, but investing in your people to help them make small progress over time is incredibly meaningful.

Evaluate on a frequency vs. severity grid

The remaining feedback items can be evaluated using a simple 2x2 grid, with frequency on one axis and severity on the other. This will give you four quadrants, similar to a SWOT analysis. Focus your efforts on high severity and high frequency items.

Measuring progress:

Try and force yourself to quantify cost and impact when solving for items on the grid. For example, we struggle to retain repeat visitors. Only 20% of new visitors return. I believe we could increase this to 40% (high impact). Ideas - make a more personal connection with guests (low cost), redesign our communication pieces (medium cost), hire a person to create a better new visitor experience (high cost).

Make a plan, apply it and then check your results against the desired progress. Adjust your plan according to results.

SWOT Analysis

- Strengths (internal)
- Weaknesses (internal)
- Opportunities (external)
- Threats (external)

Gather Feedback How Leadr Helps

- Log back into Leadr at app.leadr.com

Leadr intelligently asks your team feedback questions throughout the week.

Keep track of feedback items to look for patterns and progress.

Three feedback cards are shown, each with a profile picture, a statement, and a rating scale from 1 to 5. The 'Agree' option is selected for each.

- Donovan Giesel makes clear and convincing presentations.**
Your response will be remain anonymous.
Rating: Agree
- Rachel Barksdale produces high volumes of meaningful results in an efficient and timely manner.**
Your response will be remain anonymous.
Rating: Strongly Agree
- Terri Reuss manages multiple projects without a decrease in productivity or quality.**
Your response will be remain anonymous.
Rating: Neutral

Profile card for Sam Support, Support Specialist. LEADR Score: 9.4. Enneagram: 5. Myers Briggs: ENTJ.

Skills: Teamwork (7.8), Inspiration (9.7), Culture (9.7), Communication (9.7), Vision & Strategy (10.0).

Strategy

- Sam Support applies knowledge, skills and experience in ways that result in effective decisions. 10
- Sam Support brings together information from relevant sources when making a decision. 10
- Sam Support considers a broad range of issues or factors in making decisions. 10
- Sam Support demonstrates creativity in problem solving. 10
- Sam Support generates solutions to problems that do not depend on "business as usual" experience and thinking. 10
- Sam Support makes decisions under uncertain conditions. 10

Provide accountability and prompt discussion around collected feedback and the progress plans you put in place as a result.

The screenshot shows a meeting interface with a sidebar on the left and a main content area on the right. The sidebar lists meetings categorized by 'Future', 'Next', and 'Past'. The main content area displays the meeting details for '1:1 with Clayton CFO & Chris Campus', including a profile picture, 'About Me' text, a 'Current' agenda section with two items, and an 'Action Items' section with one item.

1:1 Meetings | **Action Items** | **Team**

Meetings

Future

- 1:1 with Clayton CFO & Chris Ca...
Monday, September 2nd

Next

- 1:1 with Clayton CFO & Chris Ca...
Monday, August 26th

Past

- 1:1 with Clayton CFO & Chris Ca...
Monday, August 19th
- Budget Meeting
Monday, August 12th

1:1 with Clayton CFO & Chris Campus

08:15 AM - 09:00 AM | Monday, August 26th | Weekly | Clayton CFO

About Me
I have two passions in life: Jesus and accounting! Prior to joining the staff team at Grace last year, I worked as a financial auditor while serving in operations at the

Birthdays
April 4th

Food
Tacos

Snack
Pop Tarts

Drink
Vanilla Latté

Current

Creator: Agenda Item

- Discuss top 2 strengths based off feedback: Strategy and Execution
- Review last project with accountability on Communication. Do you feel you have improved?

+ Add Item

Action Items

| Creator | Action Item | Due Date | Assigned |
|---------|--|----------|----------|
| | Listen to podcast on Effective Communication | | |

+ Add Item

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Section 3

Deliver Learning

“Learning is not attained by chance, it must be sought for with ardor and attended to with diligence.”

Abigail Adams

Deliver Learning:

Key Tasks

- Create a catalog of learning content
- Determine the channels you will use to deliver learning
- Pick the tool(s) to help you manage the learning process
- Determine standards
- Establish baseline
- Assess and gather feedback
- Deliver customized learning
- Apply coaching as they put the learning into practice
- Track progress and reassess
- Adjust plan according to results

At a Glance

At this point, you've laid a solid foundation by defining your culture and capability standards, using assessments to identify your baseline and areas for progress, and set up a system for gathering continuous feedback from every level of your organization. We now begin the process of helping your team bridge the gap between their baseline and their potential by delivering customized learning.

Let's refer back to our Path to Progress for a quick reminder of where we're at:

Even though the initial assessments are over, don't forget to keep your ears open and encourage real dialogue with each employee. Do they have a preferred way to consume content? Are they enjoying the type of learning content? Is it hitting home? Are they feeling encouraged or is it leaving them frustrated? How are they balancing new learning objectives with their existing list of to-dos?

Meaningful conversations will keep the path to progress moving forward. Stop talking and it increases the chance for surprise delays, discouragement and resentment.

What it is? Key Definitions

Customized learning:

According to the RAND Corporation, customized (or personalized) learning, “refers to practices that tailor the pace and focus of instruction to address the needs and goals of each student.” This can include adjustments to subject matter, learning style or assessment method.

Learning styles:

Traditionally broken into three main categories - visual (learn by seeing), auditory (learn by hearing), and kinesthetic (learn by doing). While modern research deemphasizes the validity of learning styles, rather suggesting learners have differing abilities (i.e...stronger reader, worse listener, etc.), learning styles are still widely accepted by people, including over 90% of teachers according to a 2014 study.

Why is delivering customized learning important?

We live in an age of information overload. Unlimited content is now available at the push of a button in any format. Yet, content does not equal learning.

Learning is content which has been broken down and delivered in a way which best helps the person learn and consume. Think of this example, “Here’s a great book, read it.” Compared with, “Here’s a great book, I’ve read it, let’s go through it together. Read chapter one and then we’ll discuss in our one on one next week. I’ve also sent through a couple of discussion questions to be thinking about as you read it.”

Deliver Learning **How to Begin**

Step One | Make a catalog

Start by making a library or catalog of learning sources, make sure there is a variety of learning types (audio, video, short form, long form, etc.) Then, tag or organize your learning content based on the culture or capability category.

Step Two | Choose your delivery channel

You can deliver learning through any of your normal communication channels (email, text, slack, etc.) or use a tool like Leadr to manage the content library, deliver the content and set agenda items to check in with them about what they learned from what you sent.

Step Three | Deliver learning, customized to each employee.

For example, a starting place is to send out the same podcast to all employees. Next step, send out three different podcasts to three groups of employees. Even better, send a different podcast to each employee, based specifically on their progress plan.

Deliver Learning

How to Measure

Managing this level of customized learning with your staff can feel daunting. Which podcast did I send to them? Where are they at in the book I gave them?

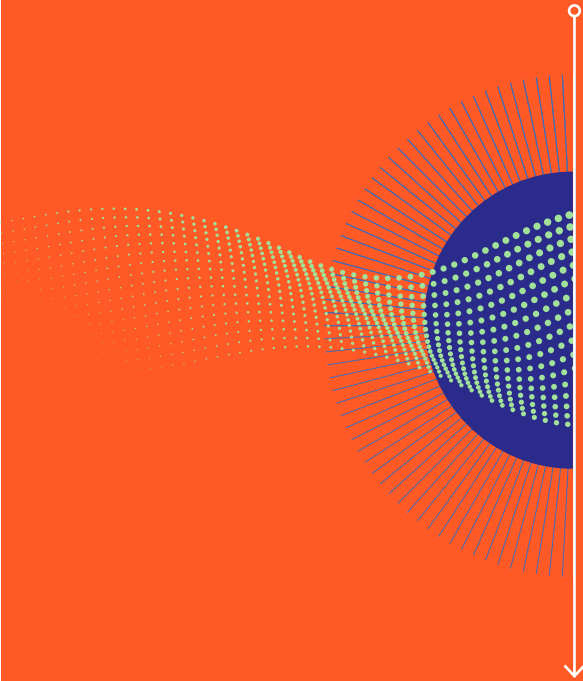
This is why getting organized with your tools is crucial.

Which tools will you be using to:

- find learning content
- deliver learning content to each employee
- track which content you've delivered
- track their progress through the learning
- record discussions or questions about the learning

This is where a tool like Leadr can save you time. All of these steps can happen right inside the platform, tied back to your 1:1 agendas and assessments. If you don't have Leadr, check out tools such as Trello or project management software like Basecamp or Asana.

**WE LIVE IN AN AGE OF
INFORMATION OVERLOAD.**



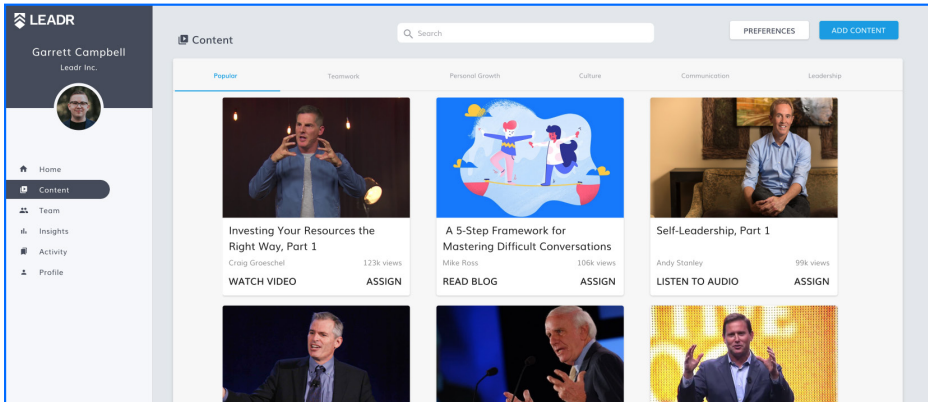
**UNLIMITED
CONTENT IS
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FORMAT.**

**YET, CONTENT
DOES NOT EQUAL
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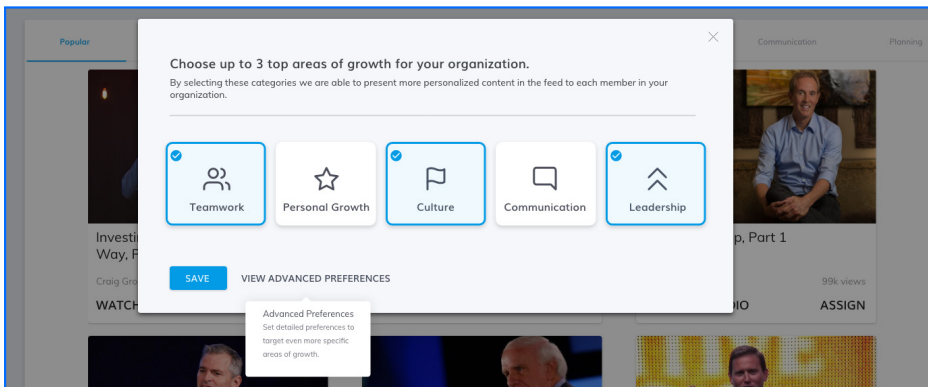
Deliver Learning How Leadr Helps

- Log back into Leadr at app.leadr.com

Create a catalog of learning content.



Categorize the content according to your organization's standards.



Deliver customized learning to employees.

The screenshot shows the LEADR interface for user Garrett Campbell. On the left is a navigation menu with options: Home, Content, Team, Insights, Strengths (selected), Organization, Activity, and Profile. The main content area is titled "II. Strengths" and includes a definition of strengths and a list of six categories: Working with Others (Teamwork), Integrity (Personal Growth), Clarity of Communication (Communication), Effectiveness (Leadership), and Humility (Leadership). To the right, "Growth Opportunities" are listed, including "Collaboration" (Teamwork) with a video "Episode 53: How to Be Real and Not Be Weird" by Craig Groeschel, and "Conflict Resolution" (Teamwork) with a video "How to Manage A Divided Nation During A Crisis" by Barack Obama. Each video has a "Suggest New" button.

Keep track of content, learning and progress and record discussion and questions with the employee. Build all of this into your 1:1 agendas.

The screenshot shows a "1:1 with Clayton CFO & Chris Campus" meeting agenda. The agenda is divided into "Future", "Next", "Past", and "Action Items" sections. The "Future" section lists a meeting on Monday, September 2nd. The "Next" section lists a meeting on Monday, August 26th. The "Past" section lists a meeting on Monday, August 19th and a "Budget Meeting" on Monday, August 12th. The "Action Items" section is currently empty. The right side of the interface shows details for the current meeting, including a profile picture, "About Me" text, and a list of items: Birthday (April 4th), Food (Tacos), Snack (Pop Tarts), and Drink (Vanilla Latte). Below this is a "Current" section with two items: "Discuss top 2 strengths based off feedback: Strategy and Execution" and "Review last project with accountability on Communication. Do you feel you have improved?".

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Section 4

Apply Coaching

“An effective coaching conversation gets to the heart of what matters. The coach is a catalyst, an important element in the process of accelerating change.”

**Henry & Karen Kimsey-House, Phillip Sandahl,
& Laura Whitworth** (*Co-Active Coaching:
Changing Business, Transforming Lives*)

Apply Coaching:

Key Tasks

- Create a progress plan for every employee
- Establish a regular cadence for check-ins
- Find a system to track and record progress
- Be ready to adjust the plan based on results

At a Glance

Perhaps just as audacious as our original goal - continuous growth for every employee, is our secondary aim - turning every manager into a coach. Thanks to the solid foundation you've been laying over these four weeks, you now have all the pieces needed to assemble a progress plan for every employee.

Work in tandem with each employee to draft, review and then agree on their progress plan. The weekly 1:1 meeting is a great format for these conversations.

What it is? Key definitions

Progress Plan:

An agreed-upon set of goals and expectations for each employee, designed to help the employee learn, grow and improve. Ideally, this is an ever-evolving plan and conversation, rather than a once a year piece of feedback. Think of it as a weekly meal plan from a nutritionist rather than a once a year physical from the doctor.

Why is coaching important?

Assessments and feedback are great gap-revealers, but if we simply wash our hands of the shared responsibility to bridge the gap with our employees, we've done them a disservice. Begin to think of yourself as a coach, not just a boss. You see the field, the goals, the opposition and most importantly, the players. Each player contains untapped potential. It's your job to invest in them, so they invest in themselves, in order to maximize that potential.

Don't dump content and run. And just as importantly, don't show them where they fall short if you aren't prepared to walk with them during the improvement process. Create a path to progress for each employee, and then guide them, side by side, without shortcutting the process, until they reach the destination.

Remember our audacious goal - continuous growth for every employee. Bold, but not impossible. How do we do it? By helping them to make small progress every day, leading to continuous growth.

Apply Coaching **How to Begin**

Step One | Get organized and create a cadence

Consistency is key with something so delicate as employee coaching. You'll rely on the regular and predictable cadence in order to establish trust and set expectations. Get organized with your tools, set a schedule and then stick to it.

Step Two | Assemble all the pieces

Ideally, work towards an all-in-one-place system for your assessments, standards, feedback, learning content, meeting agendas, etc. Having it all in one spot lends for greater visibility into trends, past history and measured progress.

Step Three | Agree with each employee on the progress plan

Work in tandem with each employee to review the organizational standards, the results of any assessments and then the new commitment to continued learning and growth. Set realistic goals and expectations - we love the phrase, "Small progress, continuous growth." And finally, make sure the employee is in agreement on the path forward. Cast the vision!

Assessments and feedback are great gap-revealers, but if we simply wash our hands of the shared responsibility to bridge the gap with our employees, we've done them a disservice.

Step Four | Make time and apply patience

We cannot emphasize this enough - meaningful work takes time. Quick fixes may be tempting, but we encourage you to put in the hours to walk alongside each employee on their path. The most impactful role models in our own lives knew how to apply patience with us, even when we didn't deserve it. Return the favor and be a catalyst in the lives of your employees. Make time for them, open your office door, go out to lunch, and reduce your use of the phrase, "I'm too busy."

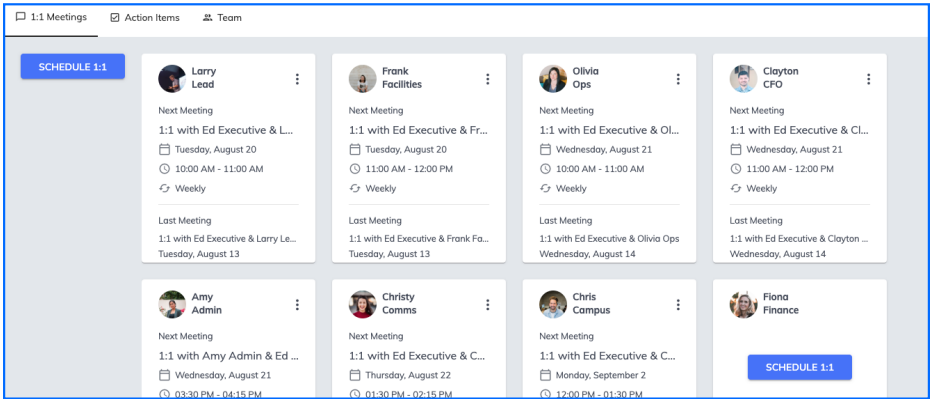
Step Five | Celebrate progress

Great coaches are driven by the prospect of progress. When we see the fruit of our labors, it makes the previous struggle worth it. Progress is noticeable and attractive. Take the time to celebrate it, even if it's just a small improvement. Measuring progress depends on the employee and the skills being developed. We'll touch on more ways to measure progress in the next chapter.

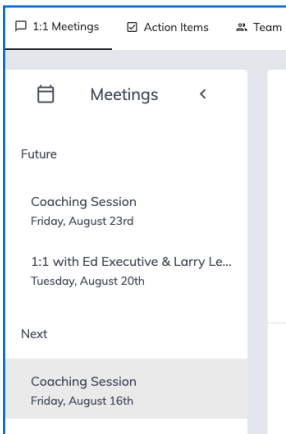
Apply Learning How Leadr Helps

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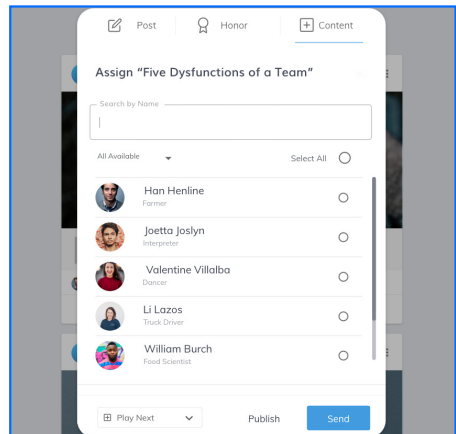
All in one place view for each employee.



Ability to look back over time.



Ability to assign content.



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Section 5

Tracking Progress

“Many leaders told us they don’t have time in the high-pressure economy for the slow and tedious work of teaching people and helping them grow.”

Daniel Goleman in his Harvard Business Review article, “Leadership that gets results.”



Tracking Progress:

At a Glance & Why it's Important

By now, you've invested the last four weeks implementing a new people development program. And while this may be its own reward, ideally we get you to place of measurable and continuous progress.

How to Measure

Recall our success metrics from the beginning of the book: better outcomes and engagement from every employee. How do we measure progress in these areas? A few ideas:

- Retake cultural or capability assessments to see improvement
- Monitor turnover rates
- Examine trends from employee feedback ([see pgs 28-31](#))
- Key business indicator improvements (i.e...customer satisfaction, product deployment speed, return visitors, etc.)

While measuring progress is not easy work, keep at it. Without the ability to assess results, it's nearly impossible to praise an employee, adjust the progress plan, or be an effective coach.

Tracking Progress

Self-Assessment Part Two

It's time to retake your original self-assessments from four weeks ago.

When issues and concerns come up, I proactively deal with them, even if it involves conflict or uncomfortable conversations.

Yes / No

I encourage teamwork and collaboration on my team and back my words up by demonstrating the practice myself.

Yes / No

I applaud excellent performance and give proper feedback when needed, tailored to the personality style of the person being recognized.

Yes / No

My staff would describe me as a person who follows through on the commitments I make.

Yes / No

I empower each person on my team with delegation while also investing in them with my time and the organization's development resources.

Yes / No

I am comfortable admitting and correcting my mistakes, even in front of the entire team when necessary.

Yes / No

I am consistent in conducting weekly 1:1 meetings with my direct reports and rarely cancel or re-schedule them.

Yes / No

I am confident my team trusts me and knows I have their back. This is seen by them sharing sensitive information or raw challenges they are facing.

Yes / No

I believe leaders must be learners who continuously develop and never arrive. This includes me.

Yes / No

My team talks to me rather than around me.

Yes / No

I see people development as a primary responsibility of mine and make it a focus on where I spend my time.

Yes / No

I create unique development plans for each person on my team, setting personalized goals with them and tracking their progress over time.

Yes / No

I make it a priority to put people on projects and tasks which utilize their core strengths.

Yes / No

I am a safe person to give direct feedback to. My first response is gratitude, not a defense mechanism.

Yes / No

I am optimistic overall, and keep my team thinking positive when problems come. I have a long term vision for my people, my department and this organization, which keeps my team hopeful for the future, even when set-backs happen.

Yes / No

I understand my leadership blind spots and actively work to improve them. In fact, I could list out one area of weakness right now I'm actively working on.

Yes / No

Add up all your "YES" answers

Total them here: ____ / 16

Reflection:

How does this compare to your original score?

Which questions stood out the most this time around?

What have you learned about yourself over these past four weeks?

Do you feel that you've made progress? Why or why not?

Going forward, what commitments are you making as both a person and a leader?

Rate on a scale of 1-10

I value the integrity and character of myself and others as more important than tangible work output. In fact, I make a point to hire, promote and recognize those with strong character rather than just focusing on talented individuals who can get the job done.



I am open to making changes in my behavior when necessary.



Diversity of thought and experiences and inclusion of a variety of voices are important to me. I could look around the table at my core team right now and see diversity and inclusion, rather than simply duplication of the same perspective.



I enjoy listening to other team member's ideas, choosing their idea over my own on a regular basis.



When a team member is upset, I try to understand and empathize with what they are going through rather than getting annoyed or seeing their pain as an inconvenience.



I enjoy surrounding myself with smarter people to collectively gain organizational success.



I lead from a place of vulnerability and encourage my team to do the same. This may include revealing areas of weakness, asking for help, or welcoming critical feedback.



My team considers me consistent in my demeanor, attitude, and values. I don't have days where they know it's best to avoid asking me for anything.



I am enthusiastic about the mission of our organization and spread excitement across my team.



I hold myself accountable to our organization's culture, and hold my team accountable as well



I welcome healthy conflict, knowing it can reveal root issues, lead the team to a better idea, and bring people closer together.



I make time for people even when it doesn't personally benefit me. I rarely use the phrase, "Sorry, it's just such a busy time right now."



Add up all your answers and total them here: ____ / 120



Reflection:

How does this compare to your original score?

Which questions stood out the most this time around?

What have you learned about yourself over these past four weeks?

Do you feel that you've made progress? Why or why not?

Going forward, what commitments are you making as both a person and a leader?

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Appendix

- [At a Glance Summary](#)
- [Glossary](#)
- [What is Leadr?](#)

Bookmark this page to use as a quick reference guide for your next four weeks.

Appendix:

At a Glance Summary

Section 1 | Assessment

Key Tasks:

- Define the standards
- Establish a baseline

Section 2 | Gather Feedback

Key Tasks:

- Determine your feedback framework
- Choose the tools you will use to collect and manage feedback
- Develop feedback discussion questions
- Organize feedback into categories to keep track of patterns and progress

Section 3 | Deliver Learning

Key Tasks:

- Create a catalog of learning content
- Determine the channels you will use to deliver learning
- Pick the tool(s) to help you manage the learning process

Section 4 | Apply Coaching

Key Tasks:

- Create a progress plan for every employee
- Establish a regular cadence for check-ins
- Find a system to track and record progress
- Be ready to adjust the plan based on results

Section 5 | Measure Progress

Key Tasks:

- Retake original self-assessments and compare results

Appendix

Glossary

Capability standards:

The tangible and tactical skills needed to accomplish the items on your to-do list. These are often unique to each role, however, some can be shared across an entire department or organization.

Cultural standards:

The way or how in which you operate. The non-negotiable standards of practice for your employees. Think of these as virtues, characteristics and the more intangible qualities of how each person conducts themselves.

Assessments:

A way to measure proficiency in a subject. Capability standard assessments are easier to measure (For example, take this test of your knowledge on powerpoint) while cultural standard assessments require more reflection and nuance (For example, on a scale of 1-10 how humble are you?).

Feedback:

Simply put, gathering feedback is the process of asking meaningful questions.

360-degree Feedback:

A type of feedback which is gathered up, down, and all around. The goal is to ask those who you encounter often to provide feedback, in order to reveal gaps between your intentions and your impact.

Continuous feedback:

The practice of building in feedback mechanisms which accommodate both spontaneous and structured information gathering in order to continuously collect data. Continuous feedback cultures rapidly identify areas for improvement in order to progressively make small progress.

Kaizen:

A Japanese continuous improvement philosophy made popular by Toyota in the 1980s which empowers frontline employees to suggest ideas as they find them.

Customized learning:

According to the RAND Corporation, customized (or personalized) learning, “refers to practices that tailor the pace and focus of instruction to address the needs and goals of each student.” This can include adjustments to subject matter, learning style and assessment method.

Learning styles:

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Appendix

What is Leadr?

Today's employees seek workplaces where they can learn, grow and be valued for their ideas, while the future success of organizations depends on talented and engaged employees who are empowered to try their ideas.

Leadr exists to bring these two groups together on a daily basis.

We are building the next generation of people management software, built to turn every manager into a coach, and give every employee a voice, in order to drive sustained, progressive and measurable employee growth, leading to cultural transformation.

Contact:

- [Learn more at leadr.com](https://leadr.com)
- hello@leadr.com

P.S. If you feel this book would benefit a colleague, send us a note at the email above and we'd be happy to send them a copy.

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