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**Leadership
and the
One Minute
Manager**

Leader Guide

**Ken Blanchard
Patricia Zigarmi
Drea Zigarmi**

AUTHORS
Ken Blanchard
Patricia Zigarmi
Drea Zigarmi

PROJECT MANAGER
Michele Jansen

LAYOUT AND DESIGN
Peggy Kennedy

EDITORS
Charlene Ables
Michele Jansen

PROOFREADERS
Linda Hulst
Kay Andrews

PRINTING SERVICES
IKON Office Solutions

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THE Ken Blanchard
COMPANIES

125 State Place, Escondido, CA 92029 USA
San Diego 760 489-5005 • 800 728-6000 • 760 489-8407
London 44 (0) 20 8540 5404 **Toronto** 905 568-2678 • 800 665-5023
www.kenblanchard.com

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Preface

After the success of the first two books in the One Minute Manager® library, *The One Minute Manager®* and *Putting the One Minute Manager to Work®*, people asked us at seminars and by letter, “What else do I need to know to really develop my people’s skills and confidence?” The answer was easy. We just turned back to what had been the “bread and butter” of The Ken Blanchard Companies since its conception—Situational Leadership® II. This concept was first developed by Paul Hersey and Ken Blanchard in the late 1960s. Since then we have modified it, with the help of our colleagues, to its present form.

The core concept of the Situational Leadership® II Model is that there is “no one best leadership style.” People in leadership positions become more effective when they use “different strokes for different folks”—that is, when they vary their leadership style in response to the needs of the people they’re trying to manage. With some employees, in some situations, on some tasks, managers need to provide lots of direction; with others, encouragement and recognition are important. In some situations it is appropriate to delegate. Effective managers learn how to diagnose the situation and how to select the appropriate leadership style to match the skills and commitment of their employees.

To really be an effective manager, you have to be a Situational Leader and master the three skills of Situational Leadership® II—flexibility, diagnosis, and partnering for performance. Effective managers are comfortable with more than one style; they have good diagnostic skills that allow them to accurately size up situations; and they are willing to discuss changes in their leadership style with their employees.

Preface, continued

Study this leader guide thoroughly. Reading the content outlines, presentation suggestions, and summaries will increase your self-confidence with the subject matter. This will stimulate new ideas and possible training activities that will be useful to you as you customize your own presentation of *Leadership and the One Minute Manager*.

We hope you'll use and apply what you learn from *Leadership and the One Minute Manager* to make a significant difference in your life and in the lives of those who work with you.

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*Ken Blanchard
Patricia Zigarmi
Drea Zigarmi*

Introduction

Leadership and the One Minute Manager will give you a framework, a language for talking to the people you manage about what they need from you in order to be good performers.

The participant workbook is designed to help participants learn more about the three skills of a Situational Leader: flexibility, diagnosis, and partnering for performance.

The purpose of this leader guide is to provide you, the facilitator, with

- Step-by-step content outlines to help you present a video-assisted Situational Leadership® II training program
- An understanding of the concepts, theory, and language of the Situational Leadership® II Model
- A source of reference materials, learning activities, and training aids to help you design and organize your presentation of Situational Leadership® II and plan a highly interactive learning experience for your participants

The video you will be using in training, *Leadership and the One Minute Manager*, uses scenes from “the movies” to teach the theory of Situational Leadership® II. In the first part of the video, participants will learn about leadership style flexibility and the four leadership styles: Directing, Coaching, Supporting, and Delegating.

In Part 2, participants will learn diagnosis—or how to choose a leadership style that is appropriate to the competence and commitment of the people they manage. By looking at a series of film clips, they’ll see what happens when leaders match their leadership style to the needs of the associates.

Introduction, continued

Finally, in Part 3 of the video, participants will see movie scenes that show what happens when leadership style does not match development level. Participants will also learn the importance of partnering for performance.

At the end of the video (after the credits) you'll find 12 movie clips to use in training Situational Leadership® II. We repeated the clips from the video (and substituted a new clip from the television show MASH, for Style 3) for trainers who want to introduce the clips themselves or use them to reinforce learning.

In each section of the workbook there are questions to test participants on what they've learned, graphics to reinforce their learning, and activities to help them plan for applying what they've learned back on the job.

In the Appendix of the participant workbook there are pages for taking notes and optional learning activities to reinforce the concepts learned.

In this leader guide you will find presentation outlines, lists of the supplies and equipment you'll need, and suggestions for optional activities. Participant workbook pages, with the answers to questions, are provided at the end of each module, and are printed on cream-colored paper for easy identification.

*Ken Blanchard
Patricia Zigarmi
Drea Zigarmi*

Preparation for Training

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Program Goals and Objectives

The overall goals of this training program are to help participants

- Understand the theory and language of Situational Leadership® II
- Learn how to use the three skills of a Situational Leader—flexibility, diagnosis, and partnering for performance—to respond more effectively to the needs of the people they manage

These goals will be accomplished by learning about

- Directive and supportive leader behavior
- The four leadership styles: Directing, Coaching, Supporting, and Delegating
- The importance of leadership style flexibility
- The concept of development level and the skill of diagnosing a person's competence and commitment on a particular task at a particular time
- The importance of matching leadership style to development level
- What it means to use “different strokes for different folks” and “different strokes for the same folks depending on the task or goal”
- How to reach agreements with associates about which leadership style is most appropriate
- How to set performance goals that build skills and commitment
- How to recognize good performance
- How to correct poor performance

Program Goals and Objectives, continued

Possible Audiences

The video *Leadership and the One Minute Manager* is a valuable learning tool for all levels of management in both profit and nonprofit organizations. Knowing why some people need a lot of direction and why others don't, why some people do a better job when they are left alone while others need lots of coaching and praising to feel good about the work they are doing, can help executives, senior managers, midlevel managers, and first-line supervisors carry out their people-managing responsibilities more effectively and productively.

Even managers who do not have direct reports can use these concepts in managing their own performance and in influencing the performance of colleagues at work and family members at home.

Implementing the *Leadership and the One Minute Manager* training program from the top down is most effective. Without the support of top management, other managers in the company may think this is "just another management training program." Including the highest level of management in your first workshop will not only demonstrate top management's support for the program, but it will also prepare these top executives to use *Leadership and the One Minute Manager* concepts and language in their day-to-day interactions with people throughout the organization.

Planning and Designing a Successful Training Program

Knowing Your Participants

In preparing for a *Leadership and the One Minute Manager* program, it is important to be sensitive to the unique characteristics of the participants you're working with—the type of work they do, the challenges and opportunities they face in their present work environment, their attitudes toward the company's performance review system, and their prior experience with management training programs. Your awareness of these factors will help in relating the theory of Situational Leadership® II to real-world concerns and will make the training more relevant to the people you're working with.

Program Design

The *Leadership and the One Minute Manager* video was created to give you, the seminar leader/facilitator, a fun and flexible way to plan and design a customized training program. Sample designs for a 3- to 3.5-hour and a full-day training program follow.

In developing your own design, consider

- Who will attend the training program?
- Is the training mandatory or voluntary?
- How much time will you have?
- What do you hope to accomplish with the training program? For example, are you trying to introduce participants to Situational Leadership® II? Are you trying to gain their commitment to an in-depth training program? Are you trying to build skills?

Planning and Designing a Successful Training Program, continued

- How well do the participants know one another?
- What are the unique needs of this group of participants?
- Have these participants been involved in previous management training? Have their experiences been positive or negative? Can you build on the previous training they've had and refer to the theories or content they know, tying it into Situational Leadership® II?
- How can you vary the learning activities you offer to keep participants involved?

Personal Preparation

As a facilitator for a *Leadership and the One Minute Manager* training program, your success and the success of those you will be training depends upon the amount of preparation you do. Unlike many of the video-assisted training programs you may have facilitated in the past, which only ask you to introduce the program, announce the breaks, and turn the video player on and off, this video program asks you to get involved and draw on the business and management experiences you and the participants bring to the session.

Planning and Designing a Successful Training Program, continued

To prepare yourself to present this training program, we suggest the following steps:

1. Approach the assignment with a positive attitude about the content and design of your program. The movie clips make this video fun! You can increase your confidence by knowing your audience and the course material, by practicing your presentation, and by seeking feedback and coaching on your skills as a workshop leader.
2. Read the book *Leadership and the One Minute Manager* and study each section thoroughly, making notes in the margins and highlighting key points you may want to emphasize during your presentation.
3. Preview the *Leadership and the One Minute Manager* video prior to presenting your workshop.
 - On the first viewing, sit back, relax, and be a visual learner. Don't be distracted by taking notes or dividing your time between the leader guide and the video. Allow yourself to just watch.
 - View the video again. This time, go through the participant workbook one section at a time, taking notes on the pages provided. (If this is your first time through the participant workbook, take a few minutes to familiarize yourself with its contents first. Note that participant workbook pages, with answers, are provided at the end of each section in your leader guide. They are printed on cream-color paper for easy identification.) Complete the Capture column of your notes first, then fill in the Take Home and Pass Along columns just as a participant would. Then go over the Video Learning Questions on the participant workbook pages in your leader guide.

Planning and Designing a Successful Training Program, continued

4. Study this leader guide thoroughly so you're familiar with the information you're presenting.
5. Plan the training program and content to match the time available.

Methods of Presentation

There is more than one way to lead an effective training session. As you move through the leader guide, you will find a number of different learning formats, including the following:

- *Lectures* are appropriate when you want to get a lot of information across in a short amount of time. Some questions might be permitted, but usually only for clarification.
- *Structured discussions* involve participants in more two-way communication. A structured discussion can be effective when time is limited and you want to channel group discussion along a predetermined track.
- *Unstructured discussions* allow the group considerable latitude in determining what is discussed. An unstructured discussion is a good teaching method when there's enough time and where essence is more important than the form in which the material is presented. An unstructured discussion allows the participants to concentrate on whatever aspects of the program they feel are most relevant to their needs.

Planning and Designing a Successful Training Program, continued

- *Small-group discussions* are carried out in teams of four to eight participants. Individual participants have the opportunity to try out their ideas and opinions on their peers, to apply new knowledge, to practice new skills, and to obtain feedback from their peers in an atmosphere that is less threatening than a large group.
- *Roleplaying activities* are practice sessions designed to give participants the opportunity to try out new behaviors or to dress-rehearse new skills under controlled circumstances in interactions with peers and learning partners. All roleplaying exercises should include a mechanism for each participant to receive feedback on the behaviors he or she is practicing.

Creating an Effective Learning Environment

The physical setup of the room and the effective use of training aids and learning materials enhance your presentation. The following checklist will help you manage the materials and supplies necessary for this training program.

- _____ a. Video: Match the video format to the equipment being used.
- _____ b. Video playback unit: Consider having a backup unit in the event of a mechanical breakdown. Review the features and operation of the unit before the program.
- _____ c. Color monitor/TV: Choose the monitor size based on one person per diagonal inch. For example, a 19-inch monitor will be visible to 19 people. In large groups, consider a projection TV or several 19- to 25-inch color monitors. It is imperative that each person have an unobstructed view.

Planning and Designing a Successful Training Program, continued

- _____ d. Room lighting: To determine whether to darken the room, preview a portion of the tape on the equipment you will use. Ask a participant to monitor the light switch throughout the program.
- _____ e. Additional equipment: Arrange for flip charts and markers, even if you're creating and using other audiovisual aids. If you plan to have a lot of group work, include one flip chart and a supply of markers for each group.
- _____ f. Break-out rooms: Depending on your design, you may want separate break-out rooms for small-group work. If so, these rooms should be prearranged and marked so that the participants can find them easily.
- _____ g. A pen or pencil for each participant
- _____ h. A pencil sharpener
- _____ i. *A Leadership and the One Minute Manager* Participant Workbook for each participant
- _____ j. A name tent or name tag for each participant
- _____ k. Scheduled breaks: Announce break times during your introduction of the program.
- _____ l. An agenda for each participant, including topics and time frames, break times, the location of rest rooms and telephones, suggested places to eat (if meals are not provided), and starting and stopping times
- _____ m. A list of participants' names, addresses, and phone numbers if appropriate

Planning and Designing a Successful Training Program, continued

- _____ n. Samples of optional handouts can be ordered from your Blanchard sales representative.* If you will be using the LBAII® Self and Scoring, be sure to order one for each participant. Call your Blanchard salesperson* for assistance or to place an order for any of the optional materials.

- _____ o. Room setup suggestions
 - The conference style works well with a group of 6 to 15 participants.
 - The U-shape is ideal for 15 to 25 people. Try to avoid seating people on the inside of the U.
 - Classroom-style seating is preferred for groups of more than 25. When using this design, take particular care to make sure that everyone in the room can see the trainer and the monitors.

* Your Blanchard sales representative can be reached at 1 800 728-6000.

Sample Training Design A

3- to 3.5 -Hour Design

<i>Suggested Time Frame</i>	<i>Activity</i>
30 minutes	<ul style="list-style-type: none"> • Introduce the program. • Have participants introduce themselves. • Present an overview of the One Minute Notetaking method.
35 minutes	<ul style="list-style-type: none"> • View Part 1 of the video: Flexibility. <ul style="list-style-type: none"> – Have participants take notes on the notetaking pages in the back of their workbooks and then answer the Video Learning Questions in Part 1 of their workbooks. – Discuss the answers.
15 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 29 of their workbooks on Leadership Style Flexibility.
45 minutes	<ul style="list-style-type: none"> • View Part 2 of the video: Diagnosis. <ul style="list-style-type: none"> – Have participants complete their own notes and then answer the Video Learning Questions in their workbooks. – Discuss the answers.
15 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 47 of their workbooks on Diagnosis.
20 minutes	<ul style="list-style-type: none"> • View Part 3 of the video: Partnering for Performance. <ul style="list-style-type: none"> – Have participants complete their own notes and then answer the Video Learning Questions in their workbooks. – Discuss the answers.
15 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 61 of their workbooks on Partnering for Performance.
15 minutes	<ul style="list-style-type: none"> • Summarize and close.

Sample Training Design B

Full-Day Training Program

<i>Suggested Time Frame</i>	<i>Activity</i>
30 to 60 minutes	<ul style="list-style-type: none"> • Introduce the program. • Have participants introduce themselves. • Present an overview of the One Minute Notetaking method.
20 minutes	<ul style="list-style-type: none"> • Distribute copies of the LBAII® Self* assessment and have participants fill them out. (Optional—see page 103.)
35 minutes	<ul style="list-style-type: none"> • Introduce the video and view Part 1: Flexibility. <ul style="list-style-type: none"> – Have participants complete their own notes and then answer the Video Learning Questions in their workbooks. – Discuss the answers.
30 minutes	<ul style="list-style-type: none"> • Distribute copies of the LBAII Scoring* to participants. Lead them through the steps of scoring the LBAII Self—Determining Flexibility and Determining Effectiveness. (Optional—see pages 104–109.)
30 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Notes column for Learning Activity 1 on Leadership Style Flexibility on page 16 of their workbooks and answer the questions at the end of each situation.
30 minutes	<ul style="list-style-type: none"> • Have participants, individually, and then in small groups, complete Learning Activity 2 on Leadership Style Flexibility on page 22 of their workbooks.
15 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 29 of their workbooks on Leadership Style Flexibility.

* Call your Blanchard sales representative at 800 728-6000 to order LBAIIs if you choose to do this optional activity.

Sample Training Design B, continued

<i>Suggested Time Frame</i>	<i>Activity</i>
45 minutes	<ul style="list-style-type: none"> • View Part 2 of the video: Diagnosis. <ul style="list-style-type: none"> – Have participants complete their own notes and then answer the Video Learning Questions in their workbooks. – Discuss the answers.
30 minutes	<ul style="list-style-type: none"> • Have participants complete the Learning Activity on Diagnosis in small groups, and then reach consensus about their answers.
15 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 47 of their workbooks on Diagnosis.
20 minutes	<ul style="list-style-type: none"> • View Part 3 of the video: Partnering for Performance. <ul style="list-style-type: none"> – Have participants complete their own notes and then answer the Video Learning Questions in their workbooks. – Discuss the answers.
10 minutes	<ul style="list-style-type: none"> • Have participants individually or in small groups complete the Partnering for Performance Learning Activity on pages 58–59 in their workbooks.
20 to 30 minutes	<ul style="list-style-type: none"> • Ask participants to complete the Action Plan on page 61 of their workbooks on Partnering for Performance. <ul style="list-style-type: none"> – Form triads to discuss the action plans.
30 minutes	<ul style="list-style-type: none"> • Have participants complete the Putting It All Together activity in the appendix of their workbooks on pages 67–72, for additional practice. (Optional.)
20 minutes	<ul style="list-style-type: none"> • Summarize and close.

Effective Presentation Skills

Visual presentation skills include appearance, posture, gestures, eye contact, and your level of nervousness.

Tips for improving these areas include

- Focusing on one person before you begin to talk
- Holding eye contact with one person until you have completed a thought
- Using your hands to emphasize the points you're making
- Turning your nervousness into visual and vocal energy
- Staying centered in front of the group—not pacing, rocking from side to side, or standing where participants can't see you
- Using aids such as flip charts to create visuals for your audience

Vocal presentation skills include volume, inflection, pace, and use of syllables like “ah” and “um.”

Tips for improving these skills include

- Modulating your voice to emphasize points
- Pausing when necessary—pausing communicates confidence and control
- Laughing at your own jokes; being confident rather than tentative
- Being aware of words that distract from your presentation (for example, okay, ah, and um)
- Believing that you are interesting and that the group wants to learn what you will present

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Introduction to Leadership and The One Minute Manager

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*When the best leader's work
is done,
the people say,
"We did it ourselves."*

Introduction

Overview

Welcome participants to the seminar, introduce yourself, and outline the program objectives for your time together. Familiarize your audience with your design, your teaching methods, and the materials to be used.

Objectives

In this section, you will

- Welcome participants and create an atmosphere of excitement and enthusiasm for the program
- Familiarize participants with the program's objectives, design, teaching methods, materials, and the participants' responsibility in the learning process
- Take care of administrative matters such as attendance rosters, name tents, workbooks, and administering the Leader Behavior Analysis II (LBAII®) Self. (Optional—see page 18.)

Advance Preparation

- Review all course materials.
- Prepare flip charts, overhead transparencies, or a computer visual aid presentation, as needed.

Suggested Time Frame

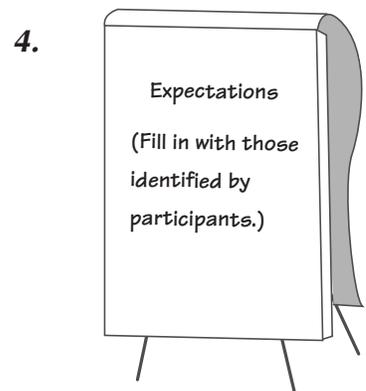
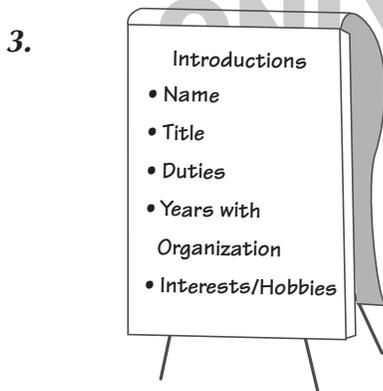
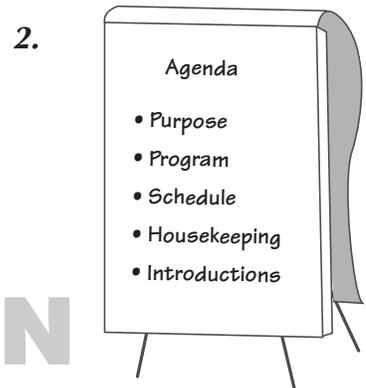
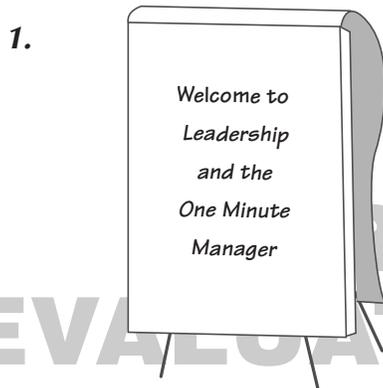
30 to 45 minutes, depending on the number of participants

Equipment/Materials

Flip charts—You may also choose to create your own overhead transparencies or computer-generated visual aids for this program.

Introduction, continued

Flip Charts for Introduction to Leadership and the One Minute Manager



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Introducing the Seminar

Introduce yourself and welcome participants to the seminar. Acknowledge the mix of management levels and experience in attendance if that is the case.

Ask participants to fill in their name tents. First name only is usually sufficient. (Have several felt-tip markers placed strategically around the room so that the names will be readable.) Use the suggested flip charts as visual aids for your introduction.

Purpose

To teach participants how to use different leadership styles with the people they manage—leadership styles appropriate to each person's level of development and the situation

Program

Tell participants that the *Leadership and the One Minute Manager* program focuses on how to manage people more effectively and that during the seminar they will learn about the three skills of a Situational Leader: flexibility, diagnosis, and partnering for performance.

Schedule

Outline the seminar design by time blocks, including morning and afternoon breaks and when a lunch break is scheduled.

Housekeeping

Point out the location of telephones, rest rooms, vending machines, snack bars, etc.

The Leader Behavior Analysis II (LBAII®) Self— Optional*

Prior to having participants review the One Minute Notetaking section in their participant workbooks or showing the first segment of the *Leadership and the One Minute Manager* video, you may want to administer the LBAII Self—an instrument designed to help participants understand their own leadership styles.

Presentation notes on the LBAII are in the Appendix—Optional Activities section of this leader guide starting on page 103.

Allow 20 minutes for participants to complete the instrument. Then ask them to set it aside.

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* The Supervisor Behavior Analysis II (SBAII) is a supervisory-level version of the LBAII. You may choose to use it to assess participants' leadership styles if the majority of your participants are frontline supervisors. Call your Blanchard sales representative for more information or to order the assessments.

Introducing the Participants

In designing an activity to introduce participants to each other, consider whether or not they 1) work together, 2) are part of the same organization but have little contact with each other, or 3) are from a number of different organizations. Determining the working relationships of participants will help you decide whether self-introductions or cross-introductions will be more effective. Where there is a high degree of familiarity, use self-introductions. When participants don't know one another or don't know each other well, cross-introductions may be more interesting and fun.

Cross-introductions involve pairing participants with a partner and giving them the assignment of interviewing each other to find out the answers to a number of questions you've written on a flip chart. In either of the two processes, ask participants to share with the group their name, title, duties, years with the organization, and possibly, hobbies and interests. Have participants share their expectations for the program and write them down as they are identified. Use the flip charts suggested on page 16.

Introducing the Participants, continued

Summary

Tell the participants that you will refer back to a list of their expectations periodically, as a means of measuring whether or not the program is responding to their concerns and meeting their needs. If you sense doubt or hostility from the participants, tell them so; do not avoid or sidestep the obvious.

Break

Depending on the number of participants in your session, a break may be in order at the conclusion of the introductions. If you are training a small group, go right into the notetaking overview at the conclusion of the introductions.

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One Minute Notetaking

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Share it with others!

The One Minute Notetaking Method*

Overview

This segment of the program is designed to teach participants an approach to notetaking that will help them recall, apply, and teach others the theory, concepts, and language of Situational Leadership® II.

Give the participants an in-depth introduction to the participant workbook, explaining the notetaking process and how they will use their workbooks during the training session. Point out the Video Learning Questions in their workbooks on page 11. Tell participants that they will answer the questions at the end of each segment of the video. If they look at the questions before viewing the video, they'll know what to look for during the presentation.

Objectives

In this section, you will

- Present participants with an organized and beneficial learning system
- Dispel some false assumptions about learning from a lecture, such as “you should just sit and listen” and “just take notes when you hear something important”
- Teach notetaking as three steps

* The One Minute Notetaking method was developed by Ken Blanchard from his work with Dr. Walter Pauk, Director of the Reading and Study Skills Center at Cornell University and Dr. Stephen Covey of Brigham Young University, a longtime friend and colleague. For more information see Walter D. Pauk, *How to Study in College* (Boston: Houghton Mifflin Company, 1983).

The One Minute Notetaking Method, continued

Advance Preparation

- Review the presentation notes on notetaking that follow.
- Review the section in the participant workbook on notetaking.
- Personally use the notetaking method during a preview of the video or during some other learning experience.
- Prepare the necessary flip chart. (See below.)

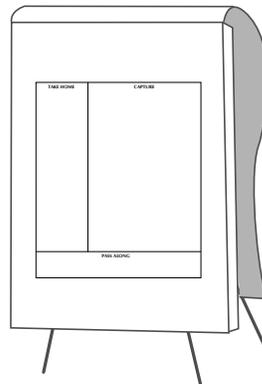
Suggested Time Frame

15 to 30 minutes

Equipment/Materials

Flip chart

Flip Chart for One Minute Notetaking Method



Presentation Notes

Present the following information, using a flip chart showing the three-column notetaking page, or have participants refer to their workbooks as you explain.

- Ask participants to open their workbooks to the One Minute Notetaking worksheet on page 4. Draw their attention to the unusual layout of the page and explain that you are about to present a notetaking method that has been used in a variety of settings to increase a person's learning potential and to significantly improve the retention of information.
- Describe the two myths of adult learning.
 - *Myth 1: People can recall what is said in training by just listening.* Most people forget 70 percent of what is said within three hours, and they forget another 10 percent within the next 24 hours. Within three weeks, their recall is down to 5 percent—not a very good return on their time or dollar investment in the training.
 - *Myth 2: People should listen carefully and only write down what they feel is important.* This means participants must hear, evaluate, and then write down what is said. By the time they've written down one point, several other points have been made and missed. Also, it may be late in the training day before an important point gets written down. Unfortunately, the context—all the little steps that help the listener make sense of this important point—may be missed. It's like writing down the punch line to a joke but forgetting the story.

Presentation Notes, continued

- Label the large area on the right of the flip chart page “Capture.” Explain that the Capture column is the area where the learner 1) writes down everything (you might want to write this statement in the Capture column), 2) withholds evaluation—if you are evaluating, you are not listening, and 3) uses his or her own shorthand and words—makes what is being said real for each participant.
- Move to the left-hand column and write “Take Home.” This is the second step in effective notetaking. Once each participant has completed the Capture column, the Take Home column serves as the area to summarize the information that the participant has written down and to relate it to his or her own experience. (Write the words “summarize, evaluate, and relate” in the Take Home column.) The Take Home column should be filled in within 24 hours of the learning experience.
- The third step in effective notetaking involves completing the Pass Along column. This column is used as an index to what’s written on the page. Move to the flip chart and write “Pass Along” in the column that runs along the bottom of the page. In this column, participants use key words or phrases, look for good one-liners, and write clearly and large. Write on the flip chart as you explain. The words in this column should trigger the information contained on the page.

Presentation Notes, continued

- Instruct participants to reverse the sequence in which they took down the information to review their notes. First, look at the Pass Along column. If the key words or phrases enable you to give yourself a 15- to 30-second lecture on the material covered on this page of notes, place a check mark in the upper left-hand corner of the page and move on. You know the information. If, however, you stumble a bit, move back to the Take Home column and see if the information given helps your recall. If you still have difficulty remembering the subject matter, move to the Capture column and reread all of the information there. The goal of the One Minute Notetaking method is to help learners separate what they know from what they do not know and to assist them in organizing their notes so that they can teach the new knowledge to others.

Summary

- One Minute Notetaking is an active-learning process.
- Capture everything that's said.
- Do not evaluate. If you are evaluating, you're not listening.

Capture column

- Take down everything.
- Do not evaluate.
- Use your own words.

Take Home column

- Summarize what's in the Capture column.
- Be specific.
- Make it relevant to you; relate it to your own experience.
- Complete the Take Home column within 24 hours.

Pass Along column

- Write down key words or phrases.
- Use as an indexing system.
- Look for good one-liners.
- Write clearly and make your key words large.

- This notetaking method is designed to separate what you know from what you do not know.
- To test your retention of the information, reverse the notetaking process.

Notetaking Page

TAKE HOME	CAPTURE FOR EVALUATION PURPOSES ONLY
PASS ALONG	

PARTICIPANT
WORKBOOK



**FOR
EVALUATION
PURPOSES
ONLY**

Part 1: Flexibility

FOR
EVALUATION *Different strokes*
PURPOSES *for*
ONLY *different folks*

Introduction

Overview

There are three skills involved in becoming a Situational Leader: flexibility, diagnosis, and partnering for performance. The first skill, flexibility, involves being able to use a variety of leadership styles comfortably—at times directing and closely supervising, at other times offering support and encouragement, and at times letting associates run with the ball. The purpose of this part of the video is to teach participants about flexibility.

An effective leader is flexible and able to use all four leadership styles: Directing, Coaching, Supporting, and Delegating. These four styles consist of different combinations of two basic leader behaviors: directive behavior and supportive behavior. In this section of the program, each of the four styles is described in detail. Participants will learn what a leader does in each style. In addition, two optional learning activities and a section on action planning are included to help participants begin to apply their learnings back on the job.

Objectives

In this section, you will

- Define leadership style and the two dimensions of leadership style: directive and supportive behavior
- Describe four different leadership styles—Directing, Coaching, Supporting, and Delegating—and how they differ from one another
- Build participants' understanding of what a leader does in each of the four styles
- Show that there is no one best style: effective leaders provide people with the direction and support they need, *when* they need it

Introduction, continued

Teaching Sequence

1. Introduce Part 1 of the video: Flexibility.
2. Have participants read through the Video Learning Questions in their workbooks on pages 11, 13, and 15.
3. Show Part 1 of the video, encouraging participants to take notes using the notetaking pages at the back of their workbooks starting on page 76.
4. Have participants complete the Take Home and Pass Along columns in their notes.
5. Have participants answer the Video Learning Questions on pages 11, 13, and 15 in their workbooks.
6. Discuss the “right” answers.
7. Score the flexibility dimension of the LBAII® Self, using the LBAII Scoring. (Optional—see Appendix, page 104.)
8. Have participants, individually or in small groups, complete Learning Activity 1 on page 16. Discuss.
9. Have participants individually or in small groups complete Learning Activity 2 on page 22. Discuss.
10. Have participants complete the Action Plan section on Leadership Style Flexibility on page 29.

Introduction, continued

Advance Preparation

- Review Part 1 of the video.
- Read the leader guide.
- Review pages 17 to 47 of the book *Leadership and the One Minute Manager* on flexibility.
- Prepare flip charts.
- Review the directions for scoring the LBAII. (Optional—see Appendix, page 104.)
- Review the directions for Learning Activities 1 and 2.
- Review the directions for the Action Plan activity.

Suggested Time Frame

- Viewing Part 1 of the video, completing the Video Learning Questions, and discussion (35 minutes)
- Scoring the LBAII—Flexibility (20 minutes—optional)
- Learning Activity 1 (30 minutes)
- Learning Activity 2 (30 minutes)
- Action Plan (15 minutes)

Equipment/Materials

- A VCR, TV monitor, and the video
- Copies of the participant workbook
- Copies of the LBAII Self and Scoring (optional)
- Flip charts
- Easels

Introduction, continued

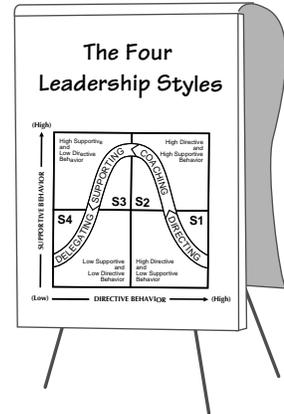
Flip Charts for Part 1—Flexibility

1.

**Three Skills
of a Situational
Leader**

- Flexibility
- Diagnosis
- Partnering for Performance

2.*



3.

Directive Behavior

The extent to which a leader engages in one-way communication; spells out the associate's role; tells the associate what to do, where to do it, when to do it, how to do it; and closely supervises performance

4.

Supportive Behavior

The extent to which a leader engages in two-way communication, listens and provides support and encouragement, facilitates interaction, and involves the associate in decision making

5.

**Different strokes
for
different folks.**

*A close-up of this graphic is on page 40.

Presentation Notes

The goal of a Situational Leader is to meet people where they are and to give them the direction and support they need, *when* they need it. An effective Situational Leader learns to use “different strokes for different folks”; in other words, different leadership styles in response to people’s needs for varying degrees of direction and support.

There are four different leadership styles: Directing, Coaching, Supporting, and Delegating. These four styles vary in three ways in terms of 1) the amount of direction the leader provides, 2) the amount of support the leader provides, and 3) the amount of associate involvement in decision making.

When managers are trying to influence the behavior of others, they engage in two types of behavior: directive and supportive. Directive behavior is the extent to which a leader tells an associate what to do, how to do it, and when to do it, and then closely supervises performance. The four key words for directive behavior are *structure, organize, teach, and supervise*. Supportive behavior is defined as the extent to which the leader lets the associate take responsibility for directing his or her own work. The four key words for supportive behavior are *encourage, listen, ask, and explain*.

Directing is a combination of high directive and low supportive behavior. The leader provides specific instruction about roles and goals and then closely supervises the associate’s performance.

Coaching is a combination of high directive and high supportive behavior. The leader explains the directions, solicits suggestions, praises approximately right behavior, but continues to direct task accomplishment.

Presentation Notes, continued

Supporting is a combination of high supportive and low directive behavior. The leader and associate make decisions together. The role of the leader is to facilitate, listen, draw the associate out, encourage, and support. *Delegating* is a combination of low directive and low supportive behavior. The leader turns over responsibility for task accomplishment to the associate; the associate provides his or her own direction and support.

With a Directing leadership style, the leader is in charge. With a Coaching leadership style, the associate is more involved in decision making, but when push comes to shove, the leader decides. With a Supporting leadership style, the associate's role is to decide how the task is to be accomplished. The leader's role is to listen and provide assurance, support, resources, and ideas if requested. When a Delegating leadership style is used, the associate decides how, when, where, and with whom the goal is to be accomplished.

Remember that managers can get results in any style. Therefore, there is no "one best" leadership style. As a Situational Leader, it's important to use "different strokes for different folks." Flexibility is important because no two people come to a task with identical skills, knowledge, confidence, or motivation. To manage people effectively at different levels of development, vary your leadership style to fit the needs of the situation. Diagnosis, which is what Part 2 of *Leadership and the One Minute Manager* is all about, is the second skill of a Situational Leader.

Summary

- There are four leadership styles: Directing, Coaching, Supporting, and Delegating.
- Each style is a different combination of directive and supportive behavior.

S1—Directing = high direction/low support

S2—Coaching = high direction/high support

S3—Supporting = high support/low direction

S4—Delegating = low direction/low support

- The four leadership styles differ in three ways: the amount of direction the leader provides, the amount of support the leader provides, and the amount of associate involvement in decision making.
- Flexibility is important because no two people come to a task with identical skills, knowledge, confidence, or motivation. To manage people effectively at different levels of development, you need to vary your leadership style to fit the needs of the situation.

**FOR
EVALUATION
PURPOSES
ONLY**

Video Learning Questions 1-6

TAKE HOME	CAPTURE
<p><i>The goal of a Situational Leader is to meet people where they are and to give them the direction and support they need, when they need it.</i></p> <ol style="list-style-type: none"> List the three skills of a Situational Leader. <ol style="list-style-type: none"> <u>Flexibility</u> <u>Diagnosis</u> <u>Partnering for Performance</u> What are the four leadership styles? <ol style="list-style-type: none"> <u>Directing</u> <u>Coaching</u> <u>Supporting</u> <u>Delegating</u> The four styles are combinations of what two behaviors? <ol style="list-style-type: none"> <u>Directive Behavior</u> <u>Supportive Behavior</u> Directive Behavior is the extent to which a leader <i>tells an associate what to do, how, and when to do it.</i> List the four words used to describe Directive Behavior. <ol style="list-style-type: none"> <u>Structure</u> <u>Organize</u> <u>Teach</u> <u>Supervise</u> As managers change their leadership style from Directing to Coaching to Supporting to Delegating, they use less <u>direction</u> because their associates learn to direct themselves. 	
<p>PASS ALONG</p>	

Directive Behavior

The leader

- Sets goals or objectives
- Plans and organizes work in advance
- Identifies job priorities
- Clarifies the leader's and associate's roles
- Establishes timelines
- Determines methods of evaluation and checks work
- Teaches an associate how to do a specific task
- Supervises progress

Supportive Behavior

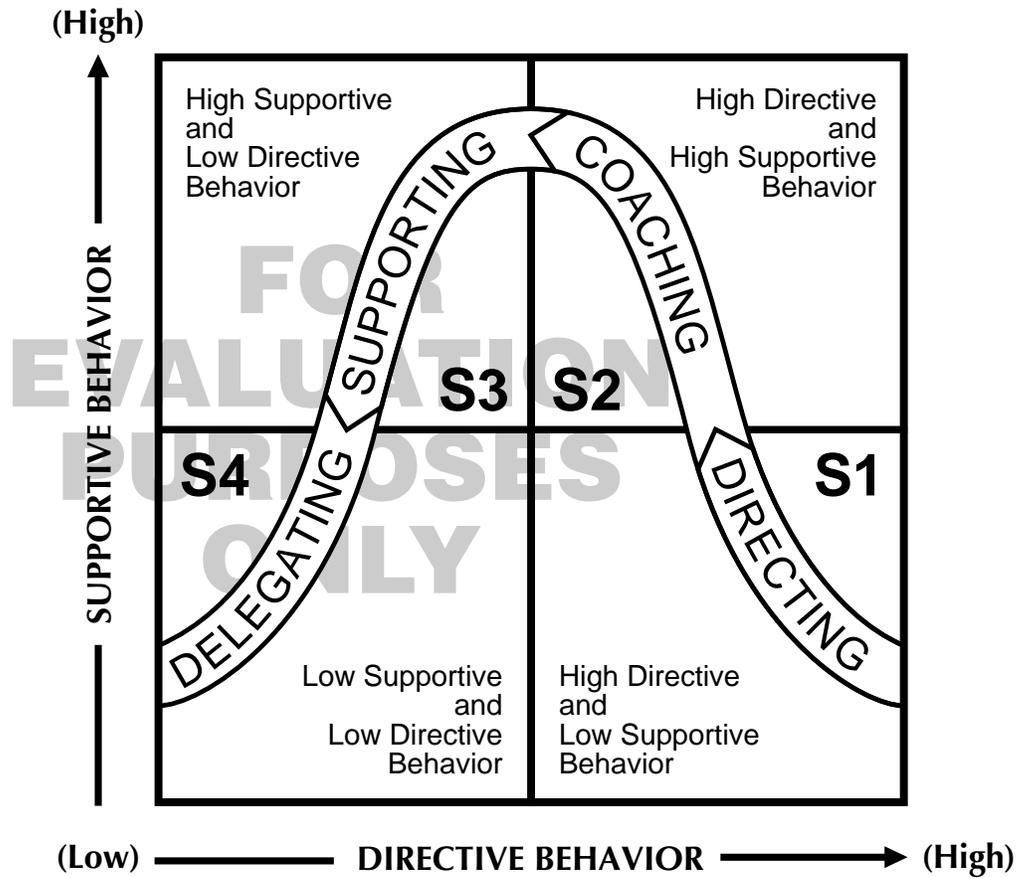
The leader

- Encourages, reassures, and praises
- Listens
- Asks for suggestions or input
- Explains why
- Encourages self-reliant problem solving
- Makes information about the organization accessible
- Discloses information about self

Video Learning Questions 7-14

TAKE HOME	CAPTURE
<p>7. Supportive Behavior is the extent to which a leader</p> <p><i>Listens, supports, encourages, and facilitates the associate's decision making and problem solving</i></p> <p>8. The four key words used to describe Supportive Behavior are</p> <p>1. <u>Encourage</u> 3. <u>Ask</u></p> <p>2. <u>Listen</u> 4. <u>Explain</u></p> <p>9. As managers move from Directing to Coaching, they <u>increase</u> the amount of support they provide.</p> <p>10. In using a Directing leadership style (S1), the manager is <u>high</u> on Directive and <u>low</u> on Supportive Behavior.</p> <p>11. With a Directing leadership style, <u>the leader</u> is in charge of decision making.</p> <p>12. The scene from <i>Young Frankenstein</i> in which Dr. Frankenstein tells his assistant to "Put the candle back!" is an example of a <u>Directing</u> leadership style.</p> <p>13. What did Dr. Frankenstein do, as an effective Style 1 manager, to "get out of a tight situation?"</p> <p><i>He was clear on what to do, how, and when to do it.</i></p> <p>14. In using a Coaching leadership style (S2), the manager is <u>high</u> on both direction and support.</p>	
<p>PASS ALONG</p>	

The Four Leadership Styles



Video Learning Questions 15–21

TAKE HOME	CAPTURE
<p>15. In the film clip showing Style 2, Coaching, with Gregory Peck in <i>12 O'Clock High</i>, the leader gives both <u>direction</u> and <u>support</u>.</p> <p>16. With a Coaching leadership style, the associate is more involved in decision making, but when push comes to shove, the <u>leader</u> decides.</p> <p>17. In another scene from <i>12 O'Clock High</i>, General Savage uses Style 3, Supporting, with a disillusioned pilot named Jesse Bishop. Style 3 is high on <u>support</u> and low on <u>direction</u>.</p> <p>18. With a Supporting leadership style, the associate's role is to decide how the job is to be done. The leader's role is to <i>Listen, provide recognition, and encourage</i>.</p> <p>19. In using a Delegating leadership style (S4), the leader is <u>low</u> on both direction and support.</p> <p>20. In another clip from the movies, we see Dr. Frankenstein <u>delegate</u> the task of getting a brain to Igor.</p> <p>21. When a Delegating leadership style is used, the <u>associate</u> decides how, when, where, and with whom the goal is to be accomplished.</p>	
<p>PASS ALONG</p>	

Leadership Style Flexibility Learning Activity 1

Directions

On pages 16–21 of their workbooks, participants will see three different manager-associate interactions. Have them read through each situation, using the column on the left to note when the manager makes a directive or a supportive comment. Participants may use the information on page 12 in their workbooks to help them identify what type of comment the manager is making. Before they go on to the next situation, have participants answer the questions at the end of the situation. Participants can complete this activity individually or in small groups. Small-group discussion of the questions enhances the value of the learning activity.

Notes

Directive (D) or
Supportive (S)
Behavior?

<p><u> D </u> <i>identifies task</i></p>
<p><u> D </u> <i>gives direction</i></p>
<p><i>reviews progress, summarizes</i></p>
<p><u> D </u> <i>spells out "how to's," next steps</i></p>

Situation 1

Setting Jerry, a new associate in the marketing department of a large company, is meeting with Susan Barnes, his manager.

Susan: Good morning, Jerry. How are you?

Jerry: Good morning, Susan. I'm fine, thanks.

Susan: Come on over and sit down and let's get organized on how we're going to track the results of the ad campaign for our new product.

Jerry: I'm looking forward to working on this project, and I feel I can do a good job.

Susan: Good, Jerry, so let's get started on some notes. (Jerry grabs a pen and a piece of paper.) What we've done thus far is to set up a campaign so that we know exactly where the sales are coming from, which states the data is coming from, which ads each state is getting, and we have a way to track progress. Right?

Jerry: Yes, that's right. What's next?

Susan: The next step of the process is to take the data that comes in and put it on the computer. That way we will be able to track it easily. We'll know exactly how the sales are running in each state with which particular ad. Once that's up and running, we can do some statistical analysis of the data.

Leadership Style Flexibility Learning Activity 1, continued

D
*spells out
 with whom
 Jerry is to
 work*

Jerry: This is helpful. I'm getting a sense of what to do next and of where we are ultimately going.

Susan: Jerry, I need you to talk to Sam Adams over in the data-processing unit. He will help you understand our computer and learn how to program it so that you can track the data and know what we're doing with the ad campaign.

Jerry: Good, I've never worked with this kind of computer before and I can use some additional training.

D
*checks for
 understanding*

Susan: All right, Jerry. Why don't you go over what you think the next steps are with me so I can be sure I've communicated them clearly?

Jerry: Fine, I'm going to take the data and prepare it to go on our computer for analysis. And, I'm going to talk to Sam Adams to learn more about our computer.

S
*asks for
 questions*

Susan: Right, now, do you have any questions?

Jerry: No, I'm ready to go.

D
*establishes
 next
 checkpoint*

Susan: Great, if you think of anything, let me know. Let's plan to meet next Monday at 9:00 a.m. to discuss your progress.

Jerry: Fine, see you then.

1. Were most of Susan's comments directive or supportive?

Directive

2. Who talked the most?

Susan

3. What leadership style was Susan using with Jerry?

Style 1—Directing

Leadership Style Flexibility Learning Activity 1, continued

Notes

Directive (D) or
Supportive (S)
Behavior?

D
*sets
timelines;
clarifies roles*

S
*facilitates
problem
solving*

S
*asks for
input,
listens*

S
*Praises,
encourages,
asks for input,
offers an idea,
and lets the
associate
decide*

Situation 2

Setting Fred is a professional engineer with a medium-sized construction management company. He works for the vice president of operations, Jim Hall.

Fred: Good afternoon, Jim. I appreciate your taking a few minutes to meet with me this afternoon.

Jim: Unfortunately, Fred, all I have is a few minutes. I'm getting ready to go on an important business trip to Houston. But, let's see what we can do now, and if we need to, we can meet again when I get back, or I can talk to you on the phone from Houston.

Fred: All right, here's the situation. You're familiar with the Dayton project?

Jim: Right.

Fred: Well, we're behind schedule on that project, and I'm having some difficulty figuring out what we should do to get back on schedule.

Jim: What seems to be the problem? What's going wrong at this point?

Fred: We've gotten the framing up and the foundations are poured, but we're running into a problem with the electrical wiring and the plumbing. I think the problem is with the people that the subcontractors are assigning to the job. I'm not quite sure which way we should go from here. Perhaps we should talk to the subs about replacing some of their associates.

Jim: That sounds like a reasonable solution to me, Fred. But, do you think that will really solve the problem? Maybe we need to go over their heads to someone at a higher level.

Leadership Style Flexibility Learning Activity 1, continued

S
praises,
facilitates
associate
problem
solving

Fred: Well, I believe that my first step should be to start with the people at the subcontractor's level—the people we have working on wiring and plumbing. Then, if that doesn't solve the problem, let's go to the general contractor and discuss the replacement of people. I think my plan may work, but I'm interested in what you think.

Jim: I think your approach will work. Why don't we stay in touch while I'm in Houston? Then, if your plan doesn't work, we can get back together again when I'm back to discuss what we should do next. But, I'd like to see you try out your solution first. I think it has a good chance of working.

Fred: All right, Jim. I'll proceed. I appreciate your time and I think I got the answer to my problem.

1. Were most of Jim's comments directive or supportive?
Supportive
2. Who talked the most?
Fred
3. What leadership style was Jim using with Fred?
Style 3—Supporting

Leadership Style Flexibility Learning Activity 1, continued

Notes

Directive (D) or
Supportive (S)
Behavior?

D
identifies
problems
S
shares
information,
asks for input
D
establishes
standard

S
asks for input

S
reassures

D
spells out
"how to's"

S
praises,
encourages

D
redirects, sets
timelines

Situation 3

Setting Lee Simpson is a supervisor at a high-tech company. His manager is Ralph Adams.

Lee: Good morning, Ralph. What did you want to see me about?

Ralph: Lee, you know that we've been having some trouble with product quality in your area and, in general, with your work as a supervisor. Now, I feel that I probably have not provided the kind of direction you needed as you moved into a supervisory position, and I want to help resolve that problem. Lee, do you understand the importance of the fact that rejections in your area are up by 10 percent?

Lee: Yes, I do.

Ralph: Do you have any ideas as to what we might do to resolve this problem?

Lee: Well, I admit I'm a little confused as to what to do. I've only been a supervisor for a short amount of time.

Ralph: All right, let me give you some suggestions and see what you think about them. What I would suggest is that you give all of your people a copy of our current quality standards and procedures. Then, be sure that each associate understands and is using these procedures. You understand the procedures and I know you can explain them to your people.

Lee: I think so. Okay, I'll meet with my people this afternoon and tell them this is how it's going to be.

Ralph: No, Lee, I don't think I'd do it quite that way. Let's get together tomorrow at 9:00, and we'll go over the quality standards and procedures and discuss how to introduce and implement them with your people.

Leadership Style Flexibility Learning Activity 1, continued

S
*empathizes,
offers
support*

Lee: Thanks.

Ralph: I know you can handle this job, Lee. I think you just need some time and maybe a little guidance from me. Perhaps I haven't provided the guidance you've needed in the past, but now I'm going to. Let's work together on this and see if we can correct this product quality problem.

Lee: Sounds good to me, Ralph. See you tomorrow.

FOR EVALUATION

1. Were most of Ralph's comments directive or supportive?

Directive and Supportive

2. Who talked the most?

Ralph

3. What leadership style did Ralph use with Lee?

Style 2—Coaching

Leadership Style Flexibility Learning Activity 2

Directions

Have participants turn to page 22 in their workbooks. Each of the eight situations that follow describes a typical job situation. Following each situation are four possible actions the leader could take. Decide which response represents Style 1—Directing; which represents Style 2—Coaching; which represents Style 3—Supporting; and which represents Style 4—Delegating. Refer participants to the graphic of the Four Leadership Styles on page 14 to help them decide. Write the style number on the line to the left of the action.

1. An associate, recently transferred to your department, has proven that she can run all of the basic computer software your department uses. You have worked with her closely and believe that she may be capable of handling more complex applications. She has demonstrated a willingness to learn and work hard, but you know that the complex software will require more technical skills on her part. You would
 - 54 a. Assign her to the more complex applications with little direction or support, since she has proven her ability to understand and use the basic software.
 - 51 b. Assign her to work with the more complex applications, explain how she is to use the software, and continue to supervise her work closely.
 - 52 c. Assign her to the more complex software and meet with her frequently to discuss any problems she might be having. Continue to monitor her performance.
 - 53 d. Assign her to work on the more complex software and praise her willingness to learn.

Leadership Style Flexibility Learning Activity 2, continued

2. In the past your company has allowed maintenance associates to decide what parts of a large job will be covered by field area craftsmen and what parts could be done by shop labor. Because of new labor agreements with the union, the old procedures are no longer feasible. You have been asked to develop a new procedure. Your associates are aware of the problem and want to help. They have been able to help in the past. They have an excellent record of accomplishment and work well together. You would
- S1 a. Decide on the new approach for job coverage and make sure they follow the procedures you develop.
- S2 b. Decide on the new approach yourself but make sure you incorporate their ideas and suggestions.
- S4 c. Ask them if they would work out the approach themselves for your approval.
- S3 d. Support and encourage them to work out a new approach but contribute your ideas as asked. Make resources available.

Leadership Style Flexibility Learning Activity 2, continued

3. You are a customer service supervisor. It has come to your attention that one of your associates has been taking extended lunch periods. Not only does he leave for the cafeteria early, but he usually finds some reason to wander through the office to visit people before going back to his workstation. His coworkers are beginning to complain. You would
- S2 a. Explain that you want him back from lunch on time but listen to his side of the story.
 - S3 b. Ask him what he intends to do about his tardiness and then support his efforts to change.
 - S4 c. Make sure he knows the problems his behavior is causing but let him decide how to resolve the issue.
 - S1 d. Tell him that you expect him to go to lunch at the prescribed time and return on time, and then check to see that it is done.
4. Your associates are competent and usually able to work well on their own as long as you visit their workstations regularly to praise them and offer encouragement. Recently, they have fallen behind on an important job and will probably finish late. You would
- S2 a. Ask for their suggestions and use their ideas as you supervise the efforts to bring the project in on time.
 - S3 b. Continue to visit their work area and encourage them to finish on time.
 - S4 c. Mention the possibility of not meeting the schedule and let them work out how to bring the project in on time.
 - S1 d. Spend a lot of time in their work area and closely supervise the activities of the group.

Leadership Style Flexibility Learning Activity 2, continued

5. As a supervisor of a sales unit, you have noticed that one of your new salespeople is not keeping accurate work records. She has been in your work unit for about a month and has a positive attitude about her job. You would
- S3 a. Ask her about her failure to keep accurate work records. Then ask her what she will do differently in the future.
 - S2 b. Spell out her duties and performance standards but be willing to incorporate any suggestions she might have.
 - S1 c. Review the specific occasions on which she failed to keep accurate work records. Then spell out what you expect of her and supervise her work closely.
 - S4 d. Emphasize the need for accurate and complete records and give her more time to improve her performance.
6. You are planning some important maintenance work that involves some changes in shift coverage for your associates. While you have made initial staffing decisions in the past, you know they have some clear ideas on shift coverage. The performance of your group has been outstanding with almost no direction or support from you. You need to make the best possible decisions for this new shift coverage as soon as possible. You would
- S2 a. Work out the new shift coverage plan but use their ideas and suggestions.
 - S4 b. Ask them to work out the new shift coverage plan.
 - S3 c. Get the group together and help them work out the shift coverage plan.
 - S1 d. Work out the new shift coverage plan and post it.

Leadership Style Flexibility Learning Activity 2, continued

7. You are a production supervisor and have transferred to a new production unit. The performance of the associates in this unit has been declining. While they may understand work procedures, they do not relieve each other on time, they fail to record significant items in the log, and the quality of their work is a problem. Their last manager was well liked but did not demand much from them. You would
- S4 a. Make sure they know about their poor performance but let them decide what the specific problems are and how to solve them.
 - S1 b. Hold a group meeting and let them know what you expect in the areas where performance is low and then closely supervise their work.
 - S3 c. Call a group meeting and encourage them to discuss and solve their own performance problems.
 - S2 d. Outline some new goals and then ask for and use their suggestions and ideas in making improvements.

Leadership Style Flexibility Learning Activity 2, continued

8. A very capable engineer in your production unit has asked for your help. In the past you have given her assignments, and she has been able to figure out what needs to be done and how to do it. She seems reluctant to start the most recent task you have given her and doubts whether she can do it. You would

- S2 a. Tell her what she is to do in detail but incorporate ideas she may have on how to complete the project.
- S1 b. Tell her what activities are necessary for the project to be done successfully and then supervise her work closely.
- S3 c. Listen to her doubts to find out what part of the project she is not sure about and then reassure her that she can do the job.
- S4 d. Give her more time to get started.

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Action Plan—Leadership Style Flexibility

Directions

Have participants complete the Action Plan worksheet on page 29 in their workbooks and share their responses with a learning partner.

The First Skill of a Situational Leader—Flexibility

What leadership styles do you find most comfortable using?

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Think for a minute about the people you manage. With which individuals and on which task do you use a Directing leadership style? A Coaching style? A Supporting style? A Delegating style?

Which styles do you need to develop? What skills does a leader need to use in relation to those styles? What three things can you do to develop those skills?

PARTICIPANT
WORKBOOK



Part 2: Diagnosis

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*When I slow down,
I go faster.*

Introduction

Overview

It's one thing to tell people there is no "best" leadership style—it's another thing to help them determine when to use which style. Part 2 of the *Leadership and the One Minute Manager* video will help participants learn about the concept of development level and how to diagnose a person's competence and commitment on a particular task. They'll also become aware of how other situational variables, such as the importance of the task or the amount of time they have to do the task, can affect their choice of a leadership style. Finally, they'll come to understand the importance of providing "different strokes for different folks" and "different strokes for the same folks, depending on the task or goal."

Objectives

In this section, you will

- Build skills in diagnosing the competence and commitment of people to the tasks they're assigned
- Define the concept of development level and describe the differences between the four levels of development
- Teach participants how to match their leadership style to the development level of the people they manage
- Alert participants to the problems of undersupervising or oversupervising

Introduction, continued

Teaching Sequence

1. Introduce Part 2 of the *Leadership and the One Minute Manager* video: Diagnosis.
2. Have participants read through the Video Learning Questions on pages 33, 35, and 37 in their workbooks.
3. Show Part 2 of the video and encourage participants to take notes using the notetaking pages starting on page 76 in their workbooks.
4. Have participants complete the Take Home and Pass Along columns in their notes.
5. Have participants answer the Video Learning Questions on pages 33, 35, and 37 in their workbooks.
6. Discuss the “right” answers.
7. Score the effectiveness dimension of the LBAII® Self, using the LBAII Scoring. (Optional—see Appendix, page 107.)
8. Have participants, individually or in small groups, complete the Diagnosis Learning Activity starting on page 38. Discuss.
9. Have participants complete the Action Plan on Diagnosis on page 47 in their workbooks.

Introduction, continued

Advance Preparation

- Preview Part 2 of the video.
- Read the leader guide.
- Review the section on diagnosis in the book *Leadership and the One Minute Manager* on pages 32 to 52.
- Prepare flip charts (see pages 58 and 59).
- Review the directions for scoring the effectiveness dimension of the LBAII. (Optional—Appendix, page 107.)
- Review the directions for the Learning Activity.
- Review the directions for the Action Plan activity.

Suggested Time Frame

- Viewing Part 2 of the video, completing the Video Learning Questions and discussion (45 minutes)
- Scoring the effectiveness dimension of the LBAII (20 minutes—optional)
- Learning Activity (30 minutes)
- Action Plan (15 minutes)

Equipment/Materials

- A VCR, TV monitor, and the video
- Copies of the participant workbook
- Copies of the LBAII Self and Scoring (optional)
- Flip charts
- Easels

Introduction, continued

Flip Charts for Part 2—Diagnosis

1.



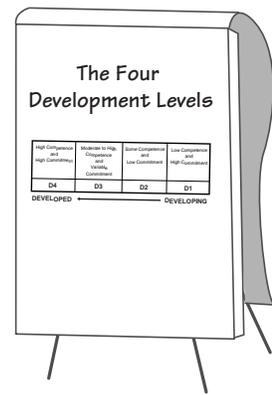
2.



3.



4. *



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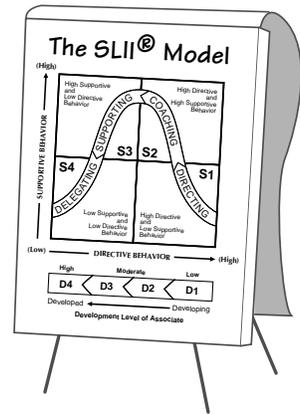
*A close-up of this graphic is on page 65.

Introduction, continued

5.



6. *

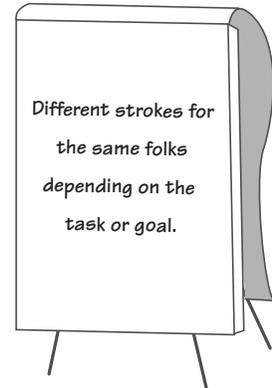


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7.



8.



*A close-up of this graphic is on page 69.

Presentation Notes

The key to being a Situational Leader is matching leadership style to development level. A Situational Leader provides “different strokes for different folks” and “different strokes for the same folks, depending on the goal or task.” No one is completely competent, confident, or committed to all tasks, all of the time. The choice of an appropriate leadership style should depend on what the associate is being asked to do and a diagnosis of their competence and commitment to the task at hand. The more knowledgeable the associate, the less direction the leader provides. The more motivated and confident the associate is, the less support the leader provides. The goal of this section is to help managers look first at the person and then at the situations they are managing, so that they don’t just use the leadership style that’s most comfortable for them, whether it is appropriate or not.

To avoid using the wrong style at the wrong time with a particular person on a particular task, effective managers consider the associate’s development level, which is a function of the associate’s competence and commitment to perform a task well without supervision.

Competence is a function of the associate’s task knowledge and skills gained through formal education, on-the-job training, and experience. In determining an associate’s competence, managers also need to look at the associate’s knowledge of the organization as well as transferable skills like planning, time management, and interpersonal communication that are important for the accomplishment of the specific task under consideration.

Presentation Notes, continued

Commitment is a function of the associate's motivation and confidence. Motivation is the associate's interest and commitment to the task and his or her enthusiasm and desire to succeed. Confidence is the person's sense of security or self-assuredness—the extent to which the associate trusts that he or she has the ability to do the work independently.

There are four levels of development:

- At **D1** a person has low competence but high commitment. We call a D1 an Enthusiastic Beginner.
- At **D2** a person has low to some competence, but often their confidence and motivation are low. We call a D2 a Disillusioned Learner.
- At **D3** a person has moderate to high competence but variable commitment. Interest in doing the task may vary from day to day, as may confidence. We call someone at D3 a Capable, but Cautious, Performer.
- At **D4** a person is competent and committed, and confident and motivated. We call a D4 a Self-Reliant Achiever.

The leadership style with the highest probability of success is the one that matches the development level of the associate. If, for example, you analyze someone as a D4 on a particular task, then S4 is appropriate. When you are dealing with highly competent and committed people, the most effective leadership style is Delegating—you let them run with the ball.

Presentation Notes, continued

The match works because the leader provides what the associates cannot provide for themselves. For a D1 associate, the leader provides direction. For a D2 associate, the leader provides direction and encouragement. For a D3 associate, the leader provides support. For a D4, the leader delegates responsibility.

When a leader does not match his or her leadership style to the needs of the associate or situation, the leader either oversupervises or undersupervises. When managers oversupervise their associates, it frustrates the associates. When managers undersupervise their associates, they usually don't get the results they want. It is important to change your leadership style as the person's development level changes. As performance improves, the leader cuts back on direction and increases support. Eventually, the leader cuts back on support, too. Then, if a person's confidence or motivation drops, more support is provided.

Summary

- The second skill of a Situational Leader is diagnosis, which means slowing down and taking a look at the situations and people you manage in order to determine the most appropriate leadership style for the situation before automatically using the style that's most comfortable for you.
- The key to determining the best leadership style for a person on a particular task is to look at his or her needs for direction and support.
- These needs can be determined by figuring out the person's development level on a particular task. How competent and committed is the associate to the task?
- Competence is a function of a person's skills and knowledge gained through training and experience. Competence is also a function of a person's transferable skills—skills developed in other assignments that build confidence—like planning, organizing, decision making, problem solving, and time management.
- Commitment is a function of confidence and motivation.
- There are four development levels:
 - D1—low competence and high commitment
 - D2—low to some competence and low commitment
 - D3—moderate to high competence and variable commitment
 - D4—high competence and high commitment

Summary, continued

- A different leadership style is appropriate for each level of development.
 - Directing is appropriate for D1.
 - Coaching is appropriate for D2.
 - Supporting is appropriate for D3.
 - Delegating is appropriate for D4.
- Development level is task specific. An individual can be at one level of development on one task and at another level of development at another task. You need to vary your leadership style with each individual, depending on the task. You have to use “different strokes for different folks” and even “different strokes for the same folks, depending on the task or goal.”

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The Four Development Levels

High Competence and High Commitment	Moderate to High Competence and Variable Commitment	Low to Some Competence and Low Commitment	Low Competence and High Commitment
D4	D3	D2	D1

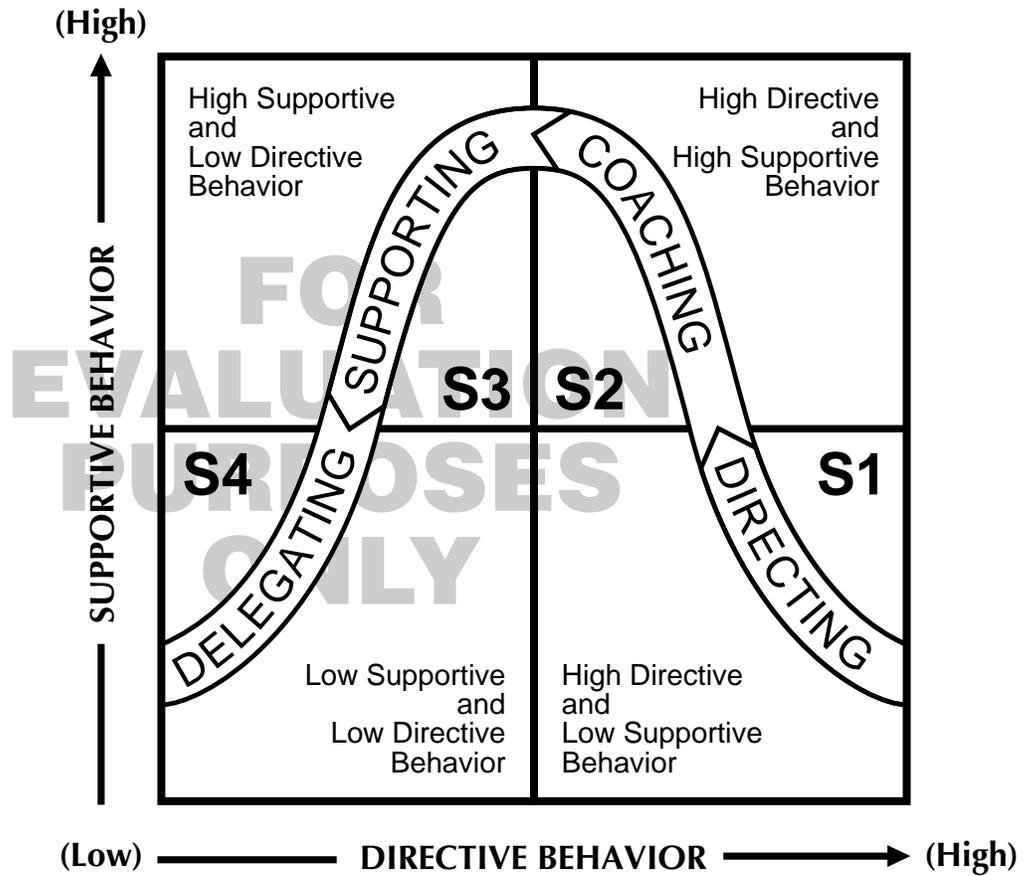
DEVELOPED ←————→ DEVELOPING

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Video Learning Questions 1–9

TAKE HOME	CAPTURE
<p>1. Diagnosis is determining when to use each <u>leadership style</u>.</p> <p>2. The scene from <i>Butch Cassidy and the Sundance Kid</i> shows the importance of thinking a situation through before acting. That's why <u>diagnosis</u> is the most important skill of a Situational Leader.</p> <p>3. There are many variables to consider in diagnosis, including <i>the organization, job, goal, task, leader, team members, and the associate.</i></p> <p>4. Performance depends on two key aspects of development level—the associate's <u>competence</u> and <u>commitment</u>.</p> <p>5. Competence has to do with an associate's <u>knowledge</u>, <u>experience</u>, and <u>skills</u>.</p> <p>6. The first scene from <i>The Paper Chase</i> shows Mr. Hart on the first day of class. Professor Kingsfield has to quickly <u>redirect</u> Mr. Hart to get the behavior he expects.</p> <p>7. The second scene from <i>The Paper Chase</i> shows Mr. Hart when he has developed <u>competence</u>.</p> <p>8. The second key element of development level is commitment, which is a function of <u>enthusiasm</u> or interest in doing the task well, and <u>confidence</u>, a feeling of self-assuredness.</p> <p>9. The film <i>Breaking Away</i> shows the <u>commitment</u> of a young man who trains to be a bicycle racer.</p>	
PASS ALONG	

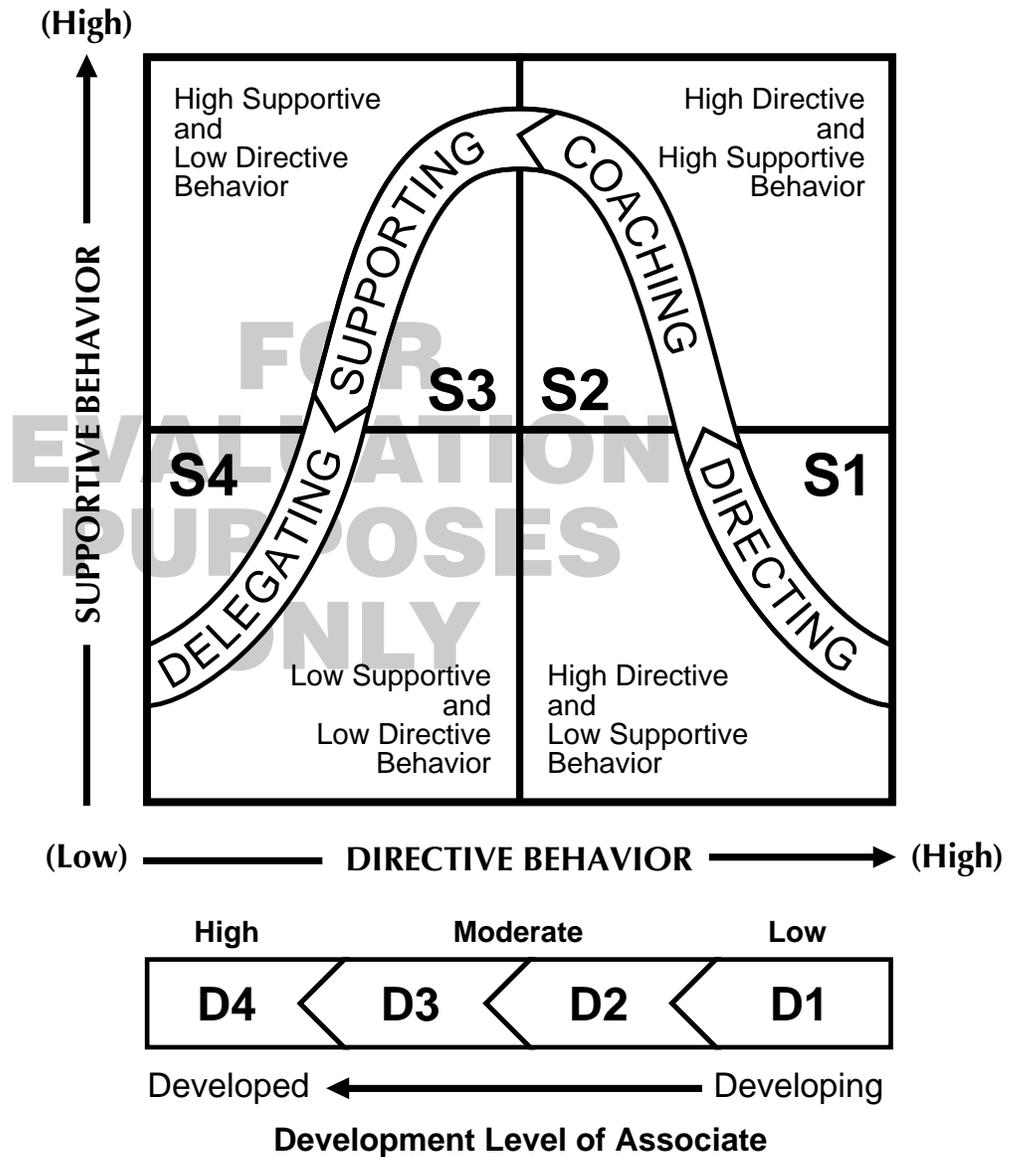
The Four Leadership Styles



Video Learning Questions 10–16

TAKE HOME	CAPTURE
<p>10. Look at the Four Development Levels graphic on page 32. At D1 an associate has <u>low</u> competence and <u>high</u> commitment.</p> <p>11. Another name for someone at the D1 level of development is an <u>Enthusiastic Beginner</u>.</p> <p>12. What leadership style does someone at D1 need? <u>S1—Directing</u> Why? <i>Because he or she has low competence but high commitment</i></p> <p>13. At D2 an associate has <u>low to some</u> competence.</p> <p>14. We call an associate at the D2 level of development a <u>Disillusioned Learner</u>.</p> <p>15. Why is Style 2, Coaching, appropriate for someone at D2? <i>Because he or she has low to some competence and low commitment</i></p> <p>16. At D3 an associate has <u>moderate to high</u> competence.</p>	
PASS ALONG	

The Situational Leadership® II Model



Video Learning Questions 17-22

TAKE HOME	CAPTURE
<p>17. At D3 an associate has moderate to high competence but <u>variable</u> commitment.</p> <p>18. We call an associate at the D3 level of development a _____ <i>Capable, but Cautious, Performer</i>.</p> <p>19. A leader who is using Style 3, Supporting, with an associate at D3 who lacks confidence would _____ <i>support, encourage, listen, and motivate</i></p> <p>20. At D4 an associate has high <u>competence</u> and <u>commitment</u>. We call an associate at this level of development a _____ <i>Self-Reliant Achiever</i></p> <p>21. Why would a Delegating leadership style work for someone at D4? <i>They have all the skills and enthusiasm and confidence they need. They can "run with the ball."</i></p> <p>22. What did you learn from watching the series of clips from <i>The Karate Kid</i>? <i>When you continually match the right leadership style to development level, people develop into Self-Reliant Achievers.</i></p>	
PASS ALONG	

Diagnosis Learning Activity

Directions

Ask participants, individually or in small groups, to take a look at the eight leadership situations on pages 38–45 in their workbooks and to indicate what the associate's development level is and which leadership style is needed by choosing action a, b, c, or d.

1. As a supervisor, you have noticed that one of your project leads and another team leader are working together effectively with encouragement from you. Lately, however, conflicts between them have caused delays and lower morale. You would
 - a. Get them together and tell them how they can resolve their conflict and see that they do it.
 - b. Talk to them separately about the problem and then get them together to discuss the problem. Encourage them to get along together and support their efforts at cooperation.
 - c. Talk to them separately to get their ideas and then bring them together and show them how to work out the conflict using their ideas.
 - d. Tell them you are concerned about the problem but give them time to work it out by themselves.

Development Level D2

Action C

Diagnosis Learning Activity, continued

2. For the last few months you have been working with some members of a start-up team, designing training and writing manuals for a workflow process that is being redesigned. During that time you have found that one member has taken the lead when problems arise. She gets along well with the others on the start-up team and is recognized as having the capability to oversee the completion of the project. Because of time restraints, you must move on to the other phases of the start-up. You have asked her to take charge of the project. Others on the team are pleased with your decision. You would
- Involve her in thinking about the problems she may encounter and support her efforts to take charge of the project.
 - Let the group work on its own under her leadership.
 - Talk with her and set goals for the project but listen to and consider her suggestions.
 - Stay in close contact with her so you can direct and closely supervise her efforts to complete the project.

Development Level D4

Action B

Diagnosis Learning Activity, continued

3. You have asked one of your associates to take on a new assignment. In his other responsibilities, he has performed well with direction and support from you. The job you have asked him to do is important to the future of your work unit. He is enthused about the new challenge. He may not have all the necessary skills. You would
- Give him the assignment and let him determine how to do it.
 - Define the activities necessary to complete the assignment successfully and supervise his work closely.
 - Listen to his concerns but encourage him to take on the new assignment and support his efforts.
 - Direct his efforts but solicit any ideas he may have.

Development Level D1

Action B

Diagnosis Learning Activity, continued

4. You are the supervisor of a merchandise design group. You have been making sure that your associates understood their responsibilities and what you expected of them and have supervised them closely. For the past month or so there have been very few complaints from the field, the group is making fewer scheduling errors, and their performance has generally been improving. You would
- Begin to let them work on their own with very little supervision but keep track of their scheduling errors and complaints.
 - Keep track of their scheduling errors and complaints and use them to praise and encourage their efforts.
 - Continue to set direction in areas where improvement is still needed but praise them for the reduction in errors and complaints and support their efforts to improve.
 - Continue to direct and supervise their efforts closely.

Development Level D2

Action C

Diagnosis Learning Activity, continued

5. Your administrative assistant, who is usually dependable, has missed the deadline for an important report for the second month in a row. You have consistently set objectives and timelines for this person, as well as provided encouragement and support. The report is overdue, and accounting is telling you that your department is holding up the monthly closure. You would
- Set a new deadline for the report to be completed and direct and supervise him closely.
 - Discuss the problem with your assistant, set a new deadline, and support and encourage him to get the report completed.
 - Emphasize the importance of getting the report completed as soon as possible and explore his reasons for why it is late.
 - Make sure he knows the report is overdue and assume he will get the report in as quickly as possible.

Development Level D1

Action A

Diagnosis Learning Activity, continued

6. You have recently been made supervisor of a production unit. In getting to know your people, you have found that one of your associates is particularly capable and innovative. He has made a number of cost-saving suggestions. At first you gave him a great deal of encouragement and support for his work but little direction. You would
- Begin to be more specific about what you want him to do but make sure you consider any creative suggestions he may have.
 - Continue to work with him in a supportive way and encourage his innovative ideas.
 - Look for new ways for him to make a contribution and begin to let him work more on his own.
 - Begin to channel his creative abilities into some very specific responsibilities and make sure he spends his time on those activities.

Development Level D4

Action C

Diagnosis Learning Activity, continued

7. Since your group has been given an increased workload, you have asked one of your associates to take charge of a new responsibility. You have worked with him before and know that he has the knowledge and experience to be successful in the assignment. However, he seems insecure about his ability to do the job. You would
- Assign the new responsibility to him and let him do it on his own.
 - Tell him what you expect him to do but consider his suggestions.
 - Listen to his concerns about his abilities but assure him that he can handle the new responsibility.
 - Tell him exactly what the new responsibility involves and then work with him closely.

Development Level D3

Action C

Diagnosis Learning Activity, continued

8. Your group has a fine record of accomplishment and is serious about its responsibilities. Even though you have spent little time in the day-to-day operations of the unit, the group has surpassed production yield, volume, and quality goals; and members of the group have worked well together. Last month's safety report just came to your attention, and you notice that the frequency of serious injury has increased, indicating that the unit's safety habits may be getting lax. You would
- Make sure the group knows about their seemingly lax safety habits but let them develop corrective actions themselves.
 - Take corrective action after listening to and considering their suggestions.
 - Discuss the situation with the group and explore with them alternate ways to correct the problem.
 - Define the problem as you see it, outline the steps necessary for its solution, and see that these steps are carried out.

Development Level D3

Action C

Action Plan—Diagnosis, continued

Associate 1 _____

Task 1 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 2 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 3 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

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Action Plan—Diagnosis, continued

Associate 2 _____

Task 1 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 2 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 3 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

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Action Plan—Diagnosis, continued

Associate 3 _____

Task 1 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 2 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

Task 3 _____

Development Level _____ My Leadership Style _____ Match? Yes/No

If no, what can you do? _____

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Part 3: Partnering for Performance

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Situational Leadership® II
is not something you do to people,
but something you do with them.

Introduction

Overview

Once participants have learned the first two skills of being an effective Situational Leader—flexibility and diagnosis—they're ready to move on to the third skill—partnering for performance. This skill is important because you involve your people in determining what their goals are and what leadership styles are appropriate to help them accomplish those goals. Remember, Situational Leadership® II is not something you do *to* people, it's something you do *with* them. Part 3 of the *Leadership and the One Minute Manager* video will also help participants learn what happens when you oversupervise or undersupervise. Partnering for performance is essentially a process of coming to agreement with the people you manage about what you expect from each other, using the language of Situational Leadership® II. It is this third skill of a Situational Leader, partnering for performance, that will enable participants to leave this training program knowing that they can do something with the theory they've learned.

Objectives

In this section, you will

- Teach participants how to establish goals and objectives with the people they manage
- Teach participants how to reach agreements with the people they manage about which leadership style to use and when

Introduction, continued

Teaching Sequence

1. Introduce Part 3 of the *Leadership and the One Minute Manager* video: Partnering for Performance.
2. Have participants read through the Video Learning Questions on pages 56–57 in their workbooks.
3. Show Part 3 of the video, encouraging participants to take notes, using the notetaking pages at the back of their workbooks.
4. Have participants complete the Take Home and Pass Along columns in their notes.
5. Have participants answer the Video Learning Questions on pages 56–57 in their workbooks.
6. Discuss the answers.
7. Have participants individually or in small groups complete the Learning Activity on pages 58–59 in their workbooks.
8. Have participants complete the Action Plan on Partnering for Performance on pages 61–63 in their workbooks.

Advance Preparation

- Preview Part 3 of the video.
- Read the leader guide.
- Review pages 67–78 in the book *Leadership and the One Minute Manager*.
- Prepare flip charts. (See page 85.)

Introduction, continued

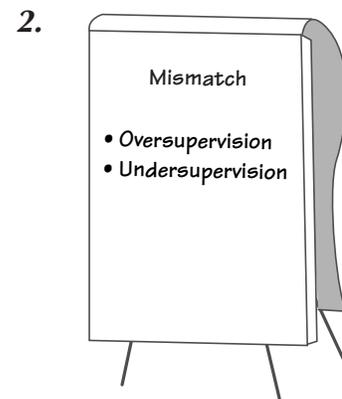
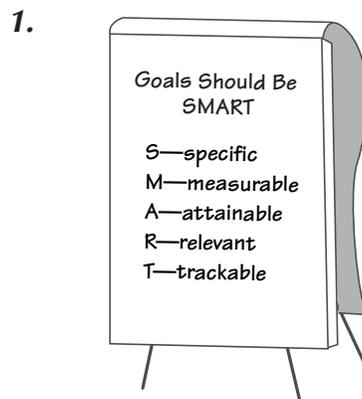
Suggested Time Frame

- Viewing Part 3 of the video, completing the Video Learning Questions, and discussion (20 minutes)

Equipment/Materials

- A VCR, TV monitor, and the video
- Copies of the participant workbook
- Flip charts
- Easels

Flip Charts for Part 3—Partnering for Performance



Presentation Notes

The third skill of a Situational Leader is partnering for performance. This skill involves agreeing with the people you manage about how you're going to help them accomplish their goals.

The first step in partnering for performance is goal setting. Goals should be SMART: specific, measurable, attainable, relevant, and trackable.

The manager and associate should think separately about the associate's goals and then meet to negotiate what the associate's job is and what a good job looks like. If the manager and the associate disagree on goals, remember the leader decides. During the goal-setting meeting, the manager and associate should also decide how they're going to track the associate's progress toward goal completion.

The second step in partnering for performance is to determine the associate's development level on each goal. Again, the manager and associate do this separately at first and then they discuss their ratings.

The third step in partnering for performance is to decide on the appropriate leadership style for the associate on each of his or her goals. In other words, how much direction and/or support does the associate need in order to do a good job, given his or her development level? The decisions about what a good job looks like and what the appropriate leadership style is constitute a partnership.

If the leader and associate decide the associate is a D4, the appropriate leadership style is S4, Delegating, and the associate should be allowed to run with the ball. The associate is in charge of communication. If a Supporting leadership style matches the associate's development level, then the leader and associate should figure out how the associate wants his or her support and recognition.

Presentation Notes, continued

If S2, Coaching, is appropriate to the associate's development level, then it's up to the leader to initiate frequent meetings to give direction and support in order to build the associate's skills, confidence, and motivation.

At least every three months, the manager and associate meet to review and evaluate the associate's performance and accomplishments on each goal and the extent to which the manager has provided the leadership style agreed upon. The Partnering for Performance Game Plan is a helpful summary of the steps.

Remind participants that Situational Leadership® II is a developmental model. The manager, by staying in touch with the associate, is looking for signs as to when it's appropriate to change his or her leadership style as the associate's performance or attitude toward the task changes. There are five steps in developing people's competence, commitment, confidence, and motivation.

1. Tell the person what the goal is.
2. Show him or her what good performance looks like.
3. Let the person try a little at a time.
4. Observe performance.
5. Praise progress or redirect.

In summary, the steps in partnering for performance are

1. Agree on goals.
2. Diagnose development level.
3. Agree on the appropriate leadership style.
4. Plan how you are going to work together.
5. Follow through, eventually changing leadership styles as the associate's competence and commitment grow.

Presentation Notes, continued

To review, the first goal of a Situational Leader is to match his or her leadership style to the associate's development level, but the ultimate goal of a Situational Leader is to change his or her leadership style as the associate's competence and commitment increase. That is why we think of Situational Leadership® II as a developmental model.

When people are just beginning a task, their motivation is high even though their competence is low. Their confidence can also be high, particularly if they have good transferable skills. What they need most from their leader is direction and training—a Directing leadership style. Later, when they're into the job and they realize the task is harder than they thought it was going to be, or they're disillusioned, their motivation often drops. As a leadership style, Directing (high direction, low support) no longer works. Instead, Coaching (high direction, high support) is needed. The manager provides support (listening, encouraging, and consulting), as well as direction, to build up the associate's commitment.

Through effective coaching, skills continue to develop until a point where the responsibility for day-to-day decision making shifts to the associate, and the manager adopts a Supporting (high support, low direction) leadership style. Some associates will love the challenge of increased responsibility; their commitment will go up. Others may get scared, and confidence and, subsequently, motivation may go down. With variable commitment on the part of the associate, the leader offers support, encouragement, and reassurance.

Presentation Notes, continued

As the associate's confidence and motivation increase, a Delegating style (low direction, low support) is appropriate. This series of changes in leadership style from Directing to Coaching to Supporting to Delegating is what we call the "developmental cycle."

As managers use each of the four leadership styles, they're providing for their associates what the associates can't provide themselves. In Style 1, they're providing direction; in Style 2, direction and support; in Style 3, reassurance and support; in Style 4, the responsibility to "run with the ball."

When an associate's performance or commitment to a task drops, we have what we call a "regressive cycle." The leader backs up one style at a time from S4 to S3 to S2 to S1 if necessary. In other words, the first step in a regressive cycle is to collect information, provide support, and then, if performance continues to drop, increase direction. If it's a confidence problem, the manager listens, supports, and encourages. If it's a motivation problem, the manager listens, problem solves, and perhaps creates some new incentives for good performance. Usually, a Supporting leadership style turns the problem around.

Summary

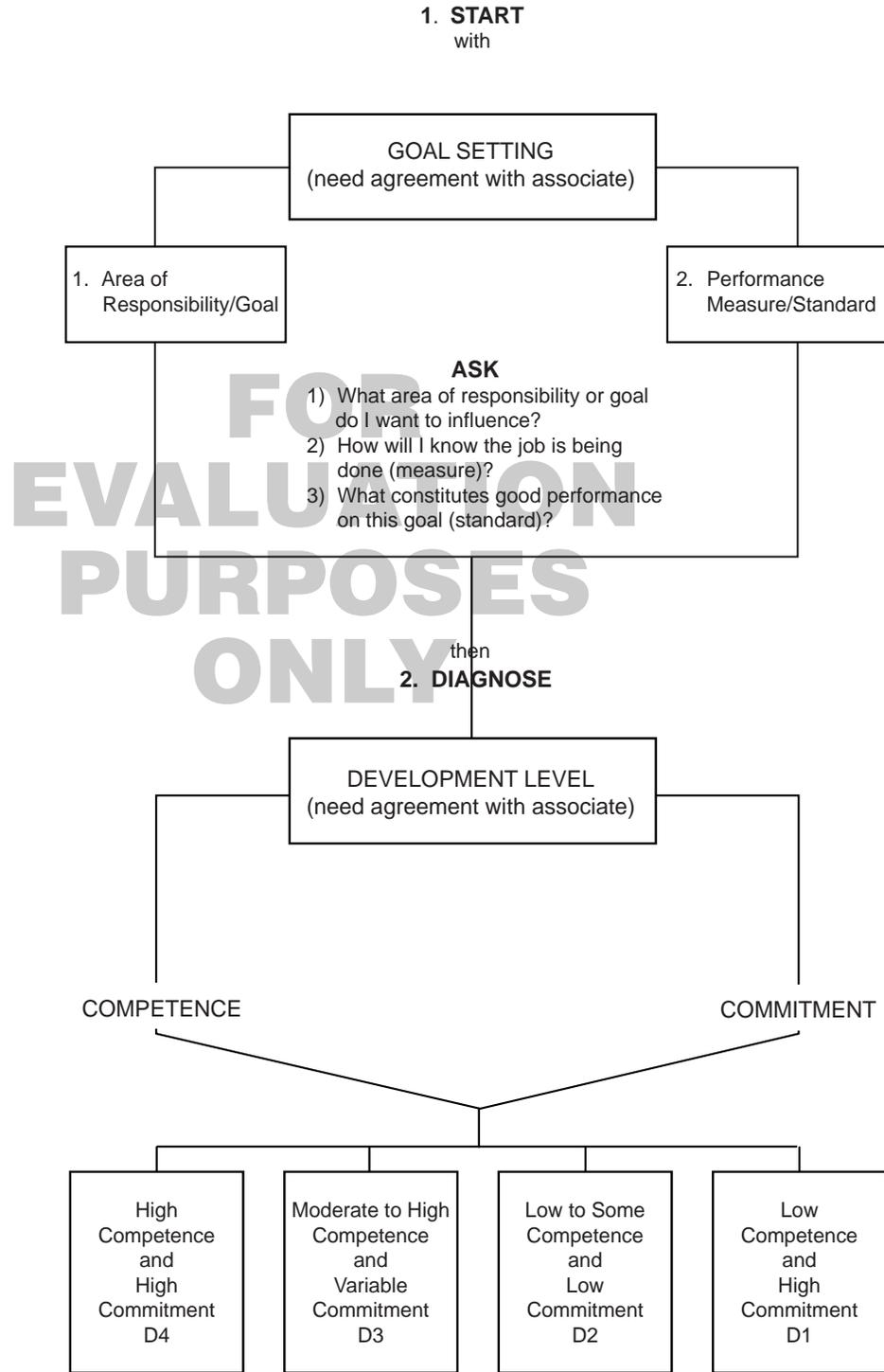
- The goal of a Situational Leader is to help people develop skills, motivation, and confidence—to help them get to a point where they can provide their own direction and support.
- A manager does this by initially providing direction, then support as performance improves until responsibility for day-to-day decision making is delegated to the associate, at which point the manager cuts back on direction and eventually support.
- In each leadership style, the manager has to give the associate what he or she can't provide for himself or herself.
 - At D1—Direction to build skills
 - At D2—Coaching to continue building skills and to rebuild commitment
 - At D3—Support to encourage the associate's motivation and confidence
 - At D4—Delegating to reinforce the associate's ability to “run with the ball” without direction or support
- Situational Leadership® II is not something you do *to* people, but something you do *with* them.
- Partnering for performance is a process for coming to agreement with your associates and deciding how much direction and/or support they need to do a good job.
- The steps in partnering for performance are:
 1. Identify the goals and performance standards.
 2. Determine the associate's development level.
 3. Decide on an appropriate leadership style for the future.
 4. Plan how to work together in the future.
 5. Follow through and deliver the appropriate leadership style.
- Partnering for performance helps a manager plan how to provide ongoing coaching and counseling in a way that is useful to the associate.
- Partnering for performance is the third skill of a Situational Leader.

Program Review and Closure

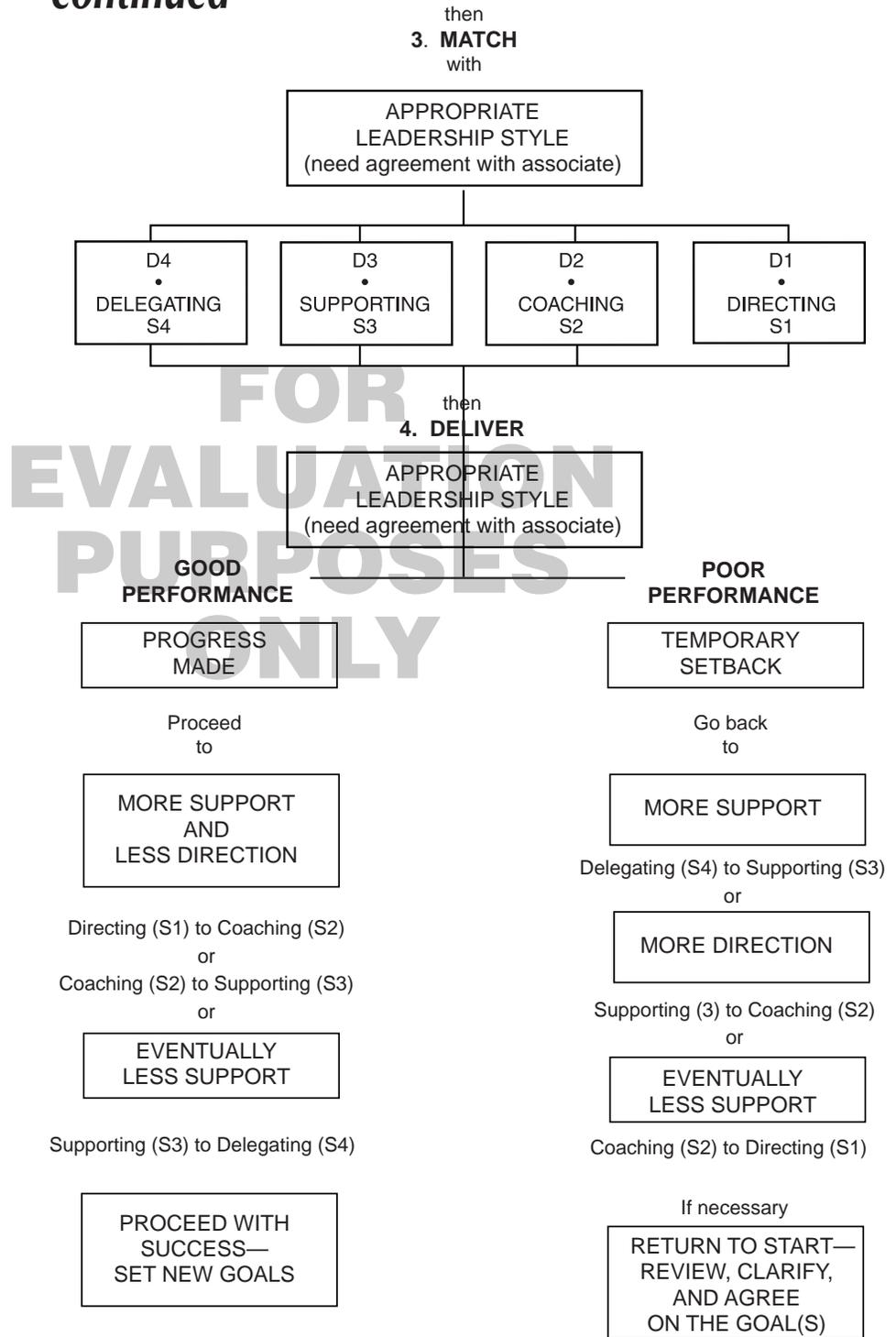
- The goal of a Situational Leader is to match leadership style to the needs of the associate for direction and support.
- Over time, if leadership style matches associates' development levels, their competence and commitment will grow until eventually they become self-directed, self-motivated peak performers.
- In the *Leadership and the One Minute Manager* video program, participants have learned how to use the three skills of a Situational Leader: flexibility, diagnosis, and partnering for performance to respond more effectively to the needs of the people they manage.
- Participants have learned
 - Directive and supportive leader behavior
 - The four leadership styles: Directing, Coaching, Supporting, and Delegating
 - The importance of leadership style flexibility
 - The concept of development level and the skill of diagnosing a person's competence and commitment on a particular task at a particular time
 - The importance of matching leadership style to development level
 - What it means to use "different strokes for different folks" and "different strokes for the same folks depending on the task or goal"
 - How to reach agreements with the people they manage about which leadership style is most appropriate
 - How to set performance goals that build skills and commitment
 - How to recognize good performance
 - How to correct poor performance
- Participants can go back to their "real jobs" and put what they've learned into use. They can practice being Situational Leaders and "watch the magic happen."

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Partnering for Performance Game Plan



Partnering for Performance Game Plan, continued



Video Learning Questions 1-5

TAKE HOME	CAPTURE
<p>1. List the two types of mismatch of leadership style to associate development level.</p> <ol style="list-style-type: none"> 1. <u>Oversupervision</u> 2. <u>Undersupervision</u> <p>2. The three Self-Reliant Achievers in the clip from <i>9 to 5</i> get back at their boss for what type of mismatch? <u>Oversupervision</u></p> <p>3. What happened in the film <i>9 to 5</i> when Jane Fonda's supervisor undersupervised her on the use of the copy machine? <i>Papers went all over because she did not have the competence to run the machine. The manager needs to observe performance.</i></p> <p>4. The last scene we saw from <i>Young Frankenstein</i> showed Dr. Frankenstein as he realized the monster's brain was "abnormal." Delegating to someone who isn't <u>competent</u> to do the job can be a disaster.</p> <p>5. Dr. Frankenstein goes from Style 4 to Style 3 to Style 2 as he listens to Igor explain why he got the wrong brain. By the end of the scene, Dr. Frankenstein has gone way beyond <u>Style 1</u> or Directing!</p>	
<p>PASS ALONG</p>	

Video Learning Questions 6–13

TAKE HOME	CAPTURE
<p>6. Partnering for performance starts with clear <u>goals</u>.</p> <p>7. Remember that associates can be at different development levels on different <u>goals or tasks</u>.</p> <p>8. Development level is task or goal <u>specific</u>.</p> <p>9. Partnering for performance ensures a match between <u>development level</u> and <u>leadership style</u>.</p> <p>10. With an Enthusiastic Beginner (D1) you use a <u>Directing (S1)</u> style.</p> <p>11. With a Disillusioned Learner (D2) you use a <u>Coaching (S2)</u> style.</p> <p>12. With a Capable, but Cautious, Performer (D3) you use a <u>Supporting (S3)</u> style.</p> <p>13. With a Self-Reliant Achiever (D4) you use a <u>Delegating (S4)</u> style.</p>	
<p>PASS ALONG</p>	

Partnering for Performance Learning Activity

Directions

Ask participants to take a look at the following situations and indicate whether or not there's a match, i.e., whether the appropriate leadership style was used for the person's level of development, or if it is an example of oversupervision or undersupervision.

Matching Your Leadership Style to the Situation

1. Your associate has done extremely well with almost no supervision from you. Although you have been working closely with the other associates who report to you, this associate didn't even ask for your help when he had to make a fairly important strategic decision. You were pleased that he handled the crisis so well.

Now that you have more time, you're concerned that you haven't been giving him enough time. So, you set up a meeting to advise him on some upcoming project decisions.

- a. Match b. Oversupervision c. Undersupervision

2. Your associate comes to you quite often for advice. He works very hard and long hours. He stands up to really tough issues but usually not until after consulting you. You believe he has the ability to be an outstanding manager. Today he came to you with a different problem that he'd never handled before.

You listen to him, praise his accomplishments and potential, and try to build his confidence by asking questions to facilitate his problem solving and decision making.

- a. Match b. Oversupervision c. Undersupervision

3. You and a coworker often work on projects that are quite similar. You each can handle several projects at a time. You have a solid relationship, similar training, and you both have been equally successful. She has just received another project, and when she told you about it, you told her exactly how to handle it.

- a. Match b. Oversupervision c. Undersupervision

Partnering for Performance Learning Activity, continued

4. Your associate is relatively new on the job and seems totally lost and confused. She does not seem to understand her new assignments, and she has almost given up.

You continue to give her the structure and direction she needs to succeed. Close supervision is necessary, but you also look for opportunities to praise progress and involve her in decision making.

- a. Match b. Oversupervision c. Undersupervision

5. Your associate has come to you for help. He is highly motivated but seems very confused. He has the potential to do the job but has a long way to go.

You listen to him and give him lots of encouragement. You let him know that you think he can succeed on his own.

- a. Match b. Oversupervision c. Undersupervision

6. You have a new associate. He has been on the job for two weeks. Because you have a great deal of experience and a strong reputation, he has asked you to help him learn how to sort out his priorities. He also has asked you to give him some direction on the procedures for getting things done quickly and effectively. You take the time to give him the training he requested.

- a. Match b. Oversupervision c. Undersupervision

Action Plan—Partnering for Performance

Think of an associate you may be oversupervising or undersupervising. Identify two goals for that associate.

Goal 1

Goal 2

What would outstanding performance on each goal look like?

Goal 1

Goal 2

For each goal, analyze the associate's development level in terms of his or her competence (task knowledge and transferable skills).

Goal 1

Goal 2

Task Knowledge:

Low to Some

High

Low to Some

High

Goal 1

Goal 2

Transferable Skills:

Low to Some

High

Low to Some

High

Action Plan—Partnering for Performance, continued

- The appropriate leadership style for Goal 1 is _____

As a manager, I need to _____

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- The appropriate leadership style for Goal 2 is _____

As a manager, I need to _____

- How will you reward progress on each goal? _____

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Appendix—Optional Activities

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*When the best leader's work
is done,
the people say,
"We did it ourselves."*

The Leader Behavior Analysis II Assessment (LBAII®)—Optional

The LBAII* Self gives participants feedback on their perceptions of their leadership style flexibility and style effectiveness.

The LBAII Self assessment tool consists of 20 situations. Have participants read each situation and choose one of the four action choices provided. It is important that they choose a response that best represents what they *would* do, not what they think they *should* do in each situation. You are interested in how they would really manage the situation, not in their perception of an ideal leadership style.

Allow 20 minutes for participants to complete the instrument. Then, ask them to set it aside.

Directions for scoring the LBAII Self begin on page 104.

* If you are using the Supervisory Behavior Analysis II (SBAII), the instructions and numbers on the following pages will not apply. Ask your Blanchard sales representative for assistance.

Scoring the LBAII Self: Determining Flexibility —Optional

- Ask participants to open the LBAII Scoring form to the style flexibility grid on page 2. On the left-hand side of that grid are the numbers 1 through 20. These numbers correspond to each of the 20 situations on the LBAII. Have participants look at the choices they selected for each of the 20 situations on the LBAII Self and circle the letter they chose in each situation. Point out the four columns under which their choices fall. There is an S1 column, an S2 column, an S3 column, and an S4 column. Each of these columns represents one of the four leadership styles. When scoring their flexibility, participants find out how many times in the 20 situations they chose each of the four leadership styles.
- After participants have transferred their scores from the LBAII onto the scoring form, have them add up the number of circles in each of the four columns. This will tell them how many times they chose each of the four styles. Once they have the totals for each of the four columns, they can calculate the difference between that number and the number 5. For example, if they have a 2 in the S1 column, the difference between 5 and 2 is 3. If they have an 8 in the S1 column, the difference between 8 and 5 is also 3. Tell them not worry about negative numbers. What is important is the absolute difference between the two numbers. Complete calculations for the S2, S3, and S4 columns.
- Have participants add across to get a subtotal. Once they have that subtotal, ask participants to subtract that number from the number 30 to get their overall flexibility score. Then have them draw an arrow to that number on the style flexibility graph. A perfect flexibility score would be 5s in the S1, S2, S3, and S4 columns.

Scoring the LBAI Self: Determining Flexibility —Optional, continued

- A score of 20 or above is considered a high flexibility score, which means that the participant perceives that he or she would manage different situations differently. For participants to score a 20, they must have at least three or four choices in two or three styles. A score of more than 20 would indicate that in the leader's self-perception, he or she is fairly flexible.
- Ask participants to look at the numbers they have written on the line marked "totals." Have them circle the highest number(s), to fill out the three matrices below the style flexibility grid.
- The leadership style(s) the participant chose most often is his or her *primary style*. If there is a tie, the participant is equally comfortable with two styles. Therefore, if he or she has a 10 in the S2 column and no other style with that many choices, the number 10 would go in the S2 circle on the primary style matrix. If the participant has an 8 in the S2 column and an 8 in the S3 column, he or she has two primary styles and the number 8 would go in *both* the S2 and S3 circles on the primary style matrix.
- A secondary style is any style, except an individual's primary style(s), in which he or she has four or more choices. If an individual has a 10 in S2 and a 4 in S1 and S3, it means the person's primary style is S2 and secondary styles are S1 and S3. The number 4 would be written in the S1 triangle *and* the S3 triangle on the secondary style matrix.

Scoring the LBAII Self: Determining Flexibility —Optional, continued

- Any other style with three or fewer choices should be marked on the developing style matrix. If a participant has 0 in S4, the number 0 goes in the Style 4 box. If a participant has a 2 in S1, the number 2 goes in the S1 box. What appears in the developing style matrix are the styles participants should begin to utilize more often, if appropriate. These are the styles they need to develop.
- In terms of self-perception, most people see their primary style as S2 or S3; Styles 1 and 4 are rarely seen as primary styles, and in many cases, not even as secondary styles. This may be because Style 1 is considered too autocratic and controlling and Style 4 is viewed as too loose or “laissez-faire.”

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Scoring the LBAII Self: Determining Effectiveness —Optional

- Being flexible doesn't guarantee that a manager will be effective. To be effective, a leader has to learn to use the appropriate leadership style in a given situation. Style effectiveness tells participants whether the style they chose when they filled out the LBAII Self were "theoretically correct" according to the Situational Leadership® II Model. Before scoring the effectiveness dimension, tell participants that a high or low style effectiveness score doesn't necessarily mean that a manager is effective or ineffective in his or her job. Only one or two styles might be needed in a participant's particular work situation; therefore, a participant's effectiveness score on the LBAII might not be as high as desired, but what he or she is doing makes sense for his or her work group.
- To score style effectiveness, have participants transfer their scores from the style flexibility grid to the style effectiveness grid. Tell participants not to worry about the little numbers next to the letters in the "F" and "P" columns on the style effectiveness grid at this time.
- After participants have transferred their scores to the style effectiveness column, have them add up the number of circles in each column. Tell them that the "E" column stands for excellent. Any choices in this column are theoretically the "best" choices. The "G" column stands for good. Any choices circled in the "F" column stand for fair. The "P" column stands for poor. Any choices circled in this column indicate the poorest choice of action the leader could have taken in this situation.

Scoring the LBAII Self: Determining Effectiveness —Optional, continued

- After adding up the number of choices they marked in each of the columns, have participants multiply these subtotals by the number below the line. The “E” column is multiplied by the number 4. The “G” column is multiplied by the number 3. The “F” column is multiplied by the number 1. The “P” column is multiplied by the number 1. Have participants add across to get their overall style effectiveness score. Tell them to draw an arrow to that number on the style effectiveness graph.
- A score of 59 or above is considered above average. This score indicates that the leader varies his or her leadership style in response to the needs of the situation. A score of 50 or below indicates that the leader’s diagnostic skills—his or her ability to determine a person’s competence and commitment—could be improved.
- On the back page of the LBAII Scoring is the style diagnosis matrix. To complete the style diagnosis matrix, have participants look at the fair and poor columns on the style effectiveness grid. Ask them to count the number of times they circled a choice with a number 1 next to it. Then, have them put that number in the oval on the style diagnosis matrix marked S1. Next have them count the number of choices in the fair and poor columns with the number 2 next to them and put that number in the S2 oval. Have them do the same for S3 and S4.
- A high score in the style diagnosis matrix (3 or more) means that the participant is using that style too much or inappropriately.

Scoring the LBAII Self: Determining Effectiveness —Optional, continued

- What's interesting about the style diagnosis matrix is that people's strengths are also their weaknesses. While many people have their primary and secondary styles in S2 and S3, these are also the styles they may have circled most in the F and P columns. The styles they seem to be the most comfortable using are also the styles they misuse or overuse. Also, while many people do not choose Styles 1 or 4 very often, when they do choose them, they tend to use them correctly and their responses fall in the G or E columns.
- Finally, ask participants to pay close attention to any style where they may have made three or more choices in the P or F columns. They may have to learn to be more cautious with these styles because they tend to use them inappropriately.

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Putting It All Together—An Optional Learning Activity

Directions

For additional practice in the concepts they've learned, have participants, individually or in small groups, read through each scenario and then answer the questions that follow.

Scenario 1

Imagine you are managing this individual in this situation:

Martha Peters is a sales supervisor in a retail chain. She has been with the company for 10 years and has worked in a number of locations and jobs. Martha loves her job; she likes the customers and enjoys a good working relationship with her manager.

Because of her dedication and experience, the other sales supervisors often come to her for advice. She is recognized by upper management as one of the best sales supervisors.

Consequently, six months ago Martha was given the additional responsibility of helping the company design a training program for people who work directly with customers. The focus of the training program was on improving sales through better customer relations. Martha did a good job of tackling her new assignment in the beginning. A number of people went to the training program, and the results seemed to be good.

Lately, however, Martha has appeared to be a little less focused on her presentation of the training modules. A number of people attending the training have complained about it being disorganized, and the ratings have gone down from what they had been over the last six months. Martha seems to be losing some enthusiasm for the project, and a number of people are even beginning to question whether the program is having any effect at all on improving customer relations and sales.

Putting It All Together—An Optional Learning Activity, continued

1. What is Martha's development level? D4-D3
2. What leadership style should you as her manager use? S3-Supporting
3. If Style 3 doesn't work, should you, as her manager
 - Praise her?
 - Reprimand her?
 - Go over her goals?
 - Redirect her?

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Putting It All Together—An Optional Learning Activity, continued

Scenario 2

Now, imagine you are managing this individual in this situation:

Fred Owens is an engineering manager in a medium-sized construction company. He has been with the company for eight years. Before that, he worked for eight years for a large international real estate development company. Fred has a professional engineer's license and a degree in mechanical engineering. He has worked on numerous construction projects during his career, both in the U.S. and South America. He has shown himself to be an excellent engineer. Since becoming an engineering manager three years ago, Fred has shown he can work through other people. He has successfully managed 70 engineers and often four or five projects at the same time. Recently, though, the growth of the company has been so rapid that he has had to take on more projects than he feels comfortable with.

Fred wonders whether he can juggle his current workload of eight projects effectively. One of his most important projects is falling behind schedule because the subcontractors are not assigning good people to the project. Fred has tried to talk to the subcontractors, but he's getting discouraged. There doesn't seem to be any progress, and Fred feels his other obligations keep him from following through and solving the problem.

1. What is Fred's development level? D3
2. What leadership style should you as his manager use? S3-Supporting

Putting It All Together—An Optional Learning Activity, continued

3. As Fred's manager, should you

- Praise him?
- Reprimand him?
- Go over his goals?
- Redirect him?

4. You might also want to renegotiate Fred's goals. What could you do as his manager to reset his goals? Write what you, as manager, might say to Fred.

Let's consider shifting some of the projects that are farther along to David. Let's strategize a plan of action for the project that's falling a little behind schedule. I think we need to adjust the schedule because of the delays we've already experienced, but I also think we need to talk to the subcontractors about the people they're assigning to the project. When can these discussions take place?

Putting It All Together—An Optional Learning Activity, continued

Scenario 3

Finally, imagine you are managing this individual in this situation:

Lee Simpson has worked in this process manufacturing plant for 18 years. He has been a foreman in the plant for six months and supervises 12 other people. For many years Lee was known as one of the best operators in the plant. When he was promoted to foreman six months ago, he was really excited about the opportunity. Unfortunately, Lee has learned that the job of supervisor is more difficult than he thought it would be. No longer is he doing the work himself, but he must get it done through others. Management is certain that Lee has the ability to do the job, but the skills of an operator are just not the same as those of a supervisor. The problem is that Lee's enthusiasm for the job has declined over the last several weeks. He seems unclear and tentative about what to do to really get the work done through his people, and the quality of production in his area is beginning to suffer.

1. What is Lee's development level? D2
2. What leadership style should you as his manager use? S2-Coaching
3. As Lee's manager, should you
 - Praise him?
 - Reprimand him?
 - Go over his goals?
 - Redirect him?

Putting It All Together—An Optional Learning Activity, continued

4. Write out a praising for Lee about what he's doing "approximately right."

Praising:

Lee, for the last six months you've been working hard at becoming a supervisor. Your relationships with your people are good. They know they can come to you for direction and advice. I'm proud of the effort you've made and I appreciate your willingness to stick it out.

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Putting It All Together—An Optional Learning Activity, continued

5. You might also want to redirect Lee. Write out a redirection for Lee.

Redirection:

Lee, when you're a supervisor, you can't just jump in and do the work like you did before, even though it's frustrating to have to take the time to explain procedures over and over again to your people. Remember, the goal of a supervisor is to teach others to do what you used to do. You have to break the job down into small steps, train your people, and then closely supervise to make sure you get the results you want. It's a slow process, but over the long haul you'll develop their skills to the point where they'll be less dependent on you. So, I don't want to see you rolling up your sleeves and solving problems—unless you're doing it to teach your people so they can do it themselves the next time. Okay?

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About the Authors

Ken Blanchard

Ken's impact as a writer is far-reaching. His phenomenal best-selling book, *The One Minute Manager*[®], coauthored with Spencer Johnson, has sold more than nine million copies worldwide and is still on best-seller lists. *The One Minute Manager* has been translated into more than 25 languages and is regarded as one of the most successful business books of all time. In addition, Ken has written several other successful books, including five more within The One Minute Manager library. He coauthored *The Power of Ethical Management*, with Dr. Norman Vincent Peale. In 1992 he released *Playing the Great Game of Golf* followed by *Raving Fans*[®]: *A Revolutionary Approach to Customer Service*, coauthored with Sheldon Bowles. In 1994 Ken released *We Are the Beloved*, a book about his spiritual journey, and in 1995 he released *Everyone's a Coach*, coauthored with Don Shula, former head coach of the Miami Dolphins. In 1996 Ken released *Empowerment Takes More Than a Minute*, with Alan Randolph and John P. Carlos, *Managing by Values*, with Michael O'Connor, and *Mission Possible: Creating a World Class Organization*, with Terry Waghorn. In 1997 he released *Managing by Values*, coauthored with Michael O'Connor. In 1998 he coauthored *Gung Ho!*[®] with Sheldon Bowles. In 1999 he released *Three Keys to Empowerment* with John P. Carlos and Alan Randolph, *The Heart of a Leader*, and *Leadership by the Book* with Bill Hybels and Phil Hodges.

Dr. Blanchard is the Chief Spiritual Officer of The Ken Blanchard Companies, a full-service management training and consulting company that he and his wife, Dr. Marjorie Blanchard, founded in 1979 in San Diego, California. He is also a visiting lecturer at his alma mater, Cornell University, where he is a trustee emeritus.

Ken has received several awards and honors for his contributions in the field of management, leadership, and speaking. In 1991 the National Speakers Association awarded him its highest honor, the "Council of Peers Award of Excellence." In 1992 Ken was inducted into the HRD Hall of Fame by *Training Magazine* and Lakewood Conferences and received the 1992 Golden Gavel Award from Toastmasters International. In 1996 he received the Distinguished Contribution to Human Resource Development Award from ASTD.

About the Authors, continued

Patricia Zigarmi

Dr. Patricia Zigarmi is a captivating motivational speaker, highly regarded management consultant and trainer, best-selling author, and dynamic businesswoman.

On the speaker's platform, she is engaging and passionate. Her ability to blend power and warmth, as well as knowledge and instinct, translates into messages that are informative, entertaining, and practical. Because of her direct contact with each of her clients and her unwavering devotion to understanding and meeting their specific needs, she delivers hard-hitting keynote speeches and training programs that consistently result in repeat engagements.

Pat wears several important hats at The Ken Blanchard Companies. She has played an integral role in the execution of many of Blanchard's long-term consulting contracts with Fortune 500 companies. Respected for her ability to listen and build trust, she has also been a coach to executives and managers in many companies.

Pat is an expert in the areas of leadership and developing excellence and is coauthor of *Leadership and the One Minute Manager*, the third book in Ken Blanchard's best-selling One Minute Manager library. She has also coauthored and produced eight new videos for Blanchard's most widely used management training program, *Situational Leadership® II*.

Pat received a bachelor's degree in sociology from Northwestern University and a doctorate in leadership and organizational development from the University of Massachusetts, Amherst.

About the Authors, continued

Drea Zigarmi

Dr. Drea Zigarmi is a highly respected and experienced management consultant, best-selling author, and powerful trainer and motivational speaker.

His client list reads like a who's who in international business, and his accomplishments within each organization are a result of his talent, knowledge, and the unique manner in which he inspires leaders to take risks and creative action. Companies such as Dow Chemical, Lockheed, and Canadian Pacific have benefited from his work in the areas of management and organizational development, performance appraisal, and productivity improvement; and their leaders have developed admiration and respect for Drea's commitment to their mission.

On the speaker's platform, Drea communicates with authority. He skillfully blends humor with a no-nonsense approach and prompts people to reflect on their learnings long after a session is over.

He is a coauthor of *Leadership and The One Minute Manager*, the third book in Ken Blanchard's best-selling One Minute Manager library, and codeveloped a number of The Ken Blanchard Companies products, including the widely used Leader Behavior Analysis instruments.

Drea received a bachelor's degree in biology from Norwich University, a master's degree in humanistic education, and a doctorate in education, administration, and organizational studies from the University of Massachusetts, Amherst.

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