



LEAD NOW! All Access

LEAD NOW! MODULE ONE

SAMPLE FACILITATOR GUIDE

LEADERSHIP DEVELOPMENT EXPERIENCE

Session 1

[Facilitator Name]

[Date]



Timing: 2h

Facilitator Notes:

- Session 1 may be 2.5 hours if you use the complete leader welcome activity on the following slide.
- Customize this experience to meet your client's needs. Include the leader's welcome message in the agenda as needed.

For virtual instructor-led (VILT) classrooms: Most video conferencing applications allow breakout groups. Use this feature or another collaboration feature to connect participants in small groups.

Preparation Steps:

- Invite senior leader to kick off the learning experience and provide talking points.
- Set up a collaboration space to use for Gems and other report back activities.
- Customize the Experience slide for your engagement.
- Plan to play the video or read the related story.
- Test the video link in the facilitator guide.
- Hide slides you won't use.

Materials:

- Participant Guides
- Who Are You? activity materials: Legos, Play-Doh or Silly Putty, or pipe cleaners
- Google Doc or virtual whiteboard to capture:
 - Who Are You? responses
 - Gems
- *LEAD NOW!* and *Leadership Gems* books



AGENDA

- **Welcome | Overview**
 - Introductions | Objectives | Ground Rules
 - About Stewart Leadership
 - Experience Overview
 - Who Are You?
- **Leadership Gems**
- **4 Relationships for Leaders**
- **LEAD NOW! Model**
- **Insights Journal**
- **Next Steps**



WELCOME | OVERVIEW | 45m

1. Customize this agenda to include opening remarks from the leader as needed.
2. Welcome participants and senior leader (if attending).
3. Review the agenda for the time today.
4. Orient participants to the online platform you are using to present the course (e.g., Zoom, Teams, etc.). Be sure all are aware of these features:
 - Camera on/off: Encourage all to keep cameras on to fully engage in the experience
 - Mute on/off
 - Participant names displayed
 - Chat
 - Pair screen and phone, if applicable: This helps prevent participants from being split when assigned to breakout rooms
5. Direct participants to the materials they received for the session.

Talking Points

- We will use various materials as we go through the session. Take a moment to locate the Participant Guide and turn to the objectives and ground rules.
- After the objectives and ground rules, we'll cover a brief explanation of the LEAD NOW! Model and the company, which is the foundation for this session.
- We will come together multiple times and look at that complete experience shortly. This is the agenda for our time together today.
- Today, we'll dig deep into the 4 Relationships for Leaders and the LEAD NOW! Model
- We'll review resources that are part of the program and the setup for the remaining sessions.

PLACEHOLDER
FOR CLIENT
LOGO AND
CLIENT-
SPECIFIC
CONTENT



Facilitator Note: Provide this suggested structure to your senior leader to help prepare a 30-minute welcome message.

Topic/Timing Message

Welcome
5 min

Be present before the session starts and welcome each participant before the experience begins.

- Welcome your team and reinforce your commitment to this experience.
- Thank the group in advance for their full engagement and active participation.

Business Case
10 min

Reinforce the current priorities facing your business today. Replace this slide with relevant road maps or strategy documents as needed.

- Potential topics:
- Competitors
 - Disrupters
 - Supply chain issues
 - Human resource challenges

Lead a brief discussion that encourages each participant to provide a one-word summary of how they feel about these opportunities.

Personal Learning Story
5 min

- Provide a personal story where you showed humility, learned from your peers, and changed your perspective.
- Refer to Leadership Lessons and Gems for inspiration, but make this story personal with specifics from your experiences.
- Invite the participants to embrace the same mindset today.

Investment in You
10 min

- Remind the team how critical they are to your business success and why you are investing in their program to help them be the best they can be for your customers and employees.
- Lead a brief discussion that allows each participant share a one-sentence commitment showing how they will embrace this opportunity.
- Post these commitments on a virtual whiteboard or flipchart.

OBJECTIVES



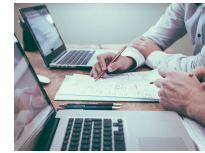
Learn to become
a complete
leader



Develop
awareness



Build your
skills



Create an
Individual
Action Plan
(IAP)



1. Review session Objectives.
2. Transition to review the session Ground Rules.

Talking Points

- Learn how to be a complete leader through the LEAD NOW! Leadership Development Model.
- Develop an awareness of your development opportunities as identified by your assessment.
- Build your skills in each of the four quadrants of the LEAD NOW! Model.
- Create an Individual Action Plan (IAP).
- Have fun, learn from each other, and leave a better leader!

GROUND RULES



BE PRESENT



BE POSITIVE



BE OPEN



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1. Emphasize that to help us all get the most out of this experience, there are a few ground rules to establish.
2. Mention that you will ask for their thumbs up or thumbs down to indicate whether they are on board with these or not!
3. Review Ground Rules.

Q: Are there any other rules we should add?

Q: Do we all agree to these Ground Rules? Thumbs up or thumbs down?

Talking Points

1. **Be present**, both mentally and physically. Let's all agree to stay focused on what is going on here in the virtual classroom. It's a challenge, but shut down email and other browser windows to not try to "multitask" during the session. Let's also be back online when asked.
2. **Be positive**. We are here to solve problems. We are here to focus on solutions to produce something positive in the end. We are here to work together—to collaborate, discuss ideas, and apply our learnings together.
3. **Be open** to new ideas and the ideas of others. Judgment is not invited to this session. The floor is open to all to share ideas and challenge each other respectfully.



1. Briefly review the LEAD NOW! Model.
2. Point out that each quadrant is supported by 4 to 7 key leadership dimensions and practices to help develop leadership skills and abilities.
3. Transition to the brief overview of Stewart Leadership, the creators of the LEAD NOW! Model.

Talking Points

- The LEAD NOW! Model is the foundation of our experience. We will spend time learning about and developing our capability in the dimensions that make up this model.
- The model was created as a results-based approach to developing leaders and is divided into four quadrants to develop great leaders.
- Effective leaders build leadership capability in each of these areas:
 - **CREATE PURPOSE:** A leader must be responsible for defining vision and strategy.
 - **DELIVER EXCELLENCE:** A leader must be responsible for delivering operational excellence and translating strategy into day-to-day execution.
 - **DEVELOP SELF & OTHERS:** A leader must create and champion change that benefits the organization.
 - **LEAD CHANGE:** A leader must value learning for self and others.

STEWART LEADERSHIP

Stewart Leadership is an international consulting firm with over 40 years of experience specializing in:

- Leadership Development
- Teaming
- Change Management
- Talent Development

Daniel Stewart | John Parker Stewart | Peter Stewart

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1. Provide a brief description of Stewart Leadership, the authors/creators of the LEAD NOW! Model.
2. Direct participants to their Participant Guides.

Talking Points

- Stewart Leadership is an international consulting firm specializing in:
 - Leadership Development
 - Teaming
 - Change Management
 - Talent Development
- Stewart Leadership is a family-run business and is led by John Parker Stewart and his sons Daniel and Peter Stewart.



Facilitator Note: Adjust this image based on the experience you are delivering. Replace the Month 1-6 headings with the actual dates.

1. Review the plan and when each session will occur.
2. Transition to The Roots of a Giant.

Q: Are there any questions about the session content or logistics?

Talking Points

- We mentioned that the overall objective is to help build your leadership skills. This is the journey we will go on together.
- Here is a high-level overview of the various sessions and what we'll cover.
- You can see when you'll do your assessment, when you'll have coaching, and when you'll work on your IAP.

EXPERIENCE OVERVIEW



Facilitator Note: Use this slide if it suits your engagement. Adjust this image based on the experience you are delivering. Use this to check in on where they are with this leadership development experience.

LEADERSHIP
LESSON #48
—
THE ROOTS
OF A GIANT

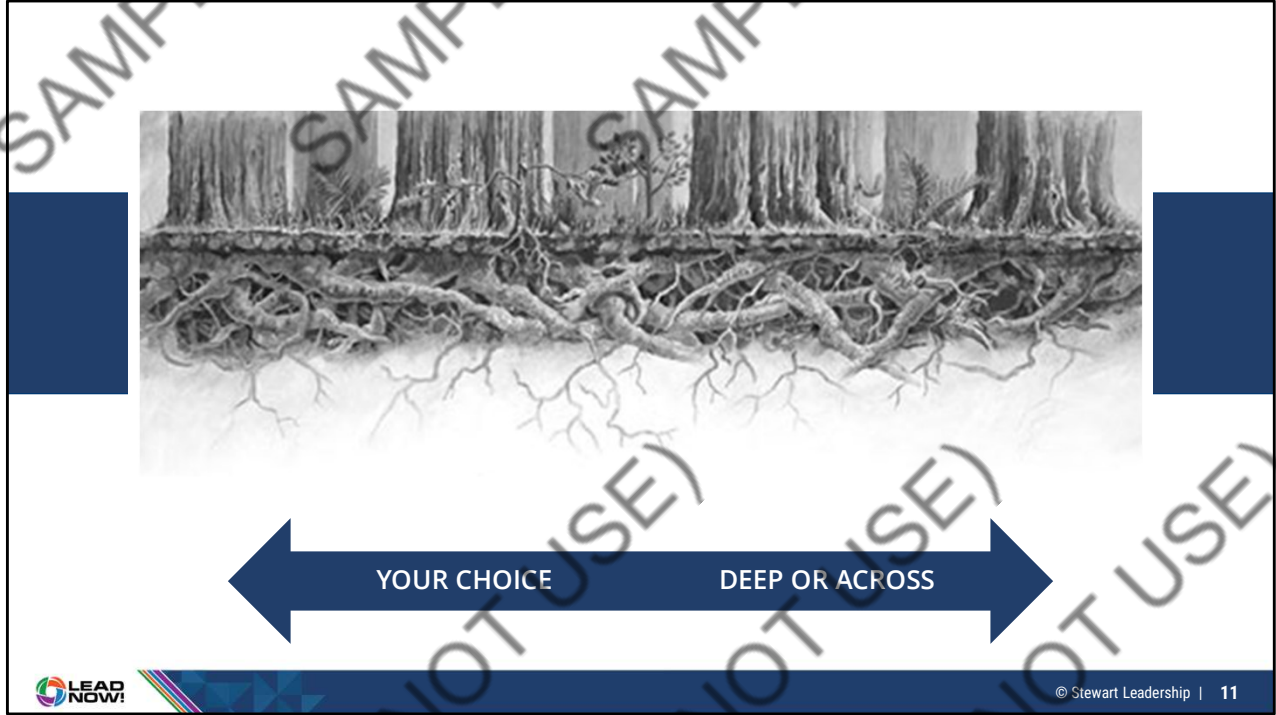


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1. Play the video: <https://stewartleadership.wistia.com/medias/ysncicxz8m>.
2. Read *Leadership Lesson #48, The Roots of a Giant*, page 211.
3. If participants have the books, point to where the story is located.
4. Transition to the discussion on building roots during this session.

Talking Point

The tallest tree has very shallow roots because it entwines its roots with other trees to be stronger...together.



1. Invite all to choose to build roots that connect with other roots during the session (sharing and being open to learning from each other and improving as a leader).
2. Explain that leaders can be stronger when they work and learn together!
3. Transition to the Who Are You? activity.

Talking Points

- Everyone has a choice to either build individual roots that are deep or to build roots that intertwine with others to become even stronger.
- As leaders, a key choice we make is about getting work done ourselves or getting work done through, and with, each other. This choice is a significant mind shift for leaders.



1. Introduce the Who Are You? activity.
2. Point out where to locate the activity instructions in the Participant Guide and the materials in their bags.
3. Check in to see if there are any questions before beginning.
4. Allow **10 minutes**.
5. End the activity after the allotted time.
6. Ask for individuals to share their responses.
7. Capture hopes and concerns on a virtual whiteboard/flip chart and address how the session will address them.
8. Transition to the Gems Board discussion.

Talking Points

- You will have 10 minutes for the activity.
- Your task is to draw an image (or images), or create something using paper, pipe cleaners, or Legos, that describes who you are as a leader.
- When you finish, you will be asked to introduce yourself and explain your creation along with your:
 - Name
 - Title
 - Organization
 - One hope for the session
 - One concern for the session
 - Creation and who you are as a leader

GEMS BOARD



What Gems have influenced your leadership journey?



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GEMS BOARD | 5m

Facilitator Note: The Gems Board can be done a few different ways in a VILT setting:

- You can give people time to write one or two Gems in their Participant Guides and then randomly call on participants or ask for volunteers to share Gems vocally and/or through the chat feature at various point throughout the sessions.
- There are also virtual whiteboards you can use (e.g., scrumblr.ca, Mural, or Miro).
- You can use a coauthoring tool, like Google Doc or Slides.
- Be sure to identify/bring two or three of your own Gems to share with the group.

1. Introduce the Gems Board.
2. Remind participants that their prework included identifying one leadership Gem to bring to session. [Make a note of this on the material list.]
3. Ask people to write their Gems in their Participant Guides.
4. Direct individuals to the back of their Participant Guides to find where they can capture the Gems that resonate with them.
5. Have participants add their Gems to the virtual whiteboard or Google Doc.
6. Recognize the contribution and importance each gem to each individual and note that we'll be hearing from everyone during our time together.
7. Transition to the Leadership Gem, Just Because....

Talking Points

- We'll visit the Gems Board periodically to review them and share our insights and best practices with one another.
- During our time together, think of your own personal leadership Gems that have resonated with or influenced you and collect them here.
- We'll hear from everyone by the time the experience series is complete.

**LEADERSHIP
GEM #38**
—
**JUST
BECAUSE...**



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1. Read *the Leadership Gem #38*, page 173, Just Because You Are Good With a Hammer Doesn't Give You the Right to View the World as a Bunch of Nails.
2. Explain that this Gem provides good insight on the importance of being a complete leader.
3. Transition to the discussion on the 4 Relationships for Leaders and explain that this is where we begin the journey to build our awareness on how and where we need to strengthen our leadership capabilities to become more complete leaders.

Talking Points

- Skilled construction workers use a variety of tools during the building process. Consider how ridiculous and useless it would be if they used only a hammer for each task.
- As leaders acquire habits and gain knowledge, they develop a versatile bag of tools and approaches. These tools provide great value and can dramatically increase a leader's success.
- However, when leaders become so good at applying a certain style, they are more inclined to use that style even when it's not the right one for a particular situation.
- Leaders sometimes force a situation to fit the method or tool they prefer instead of being flexible and allowing the circumstances to determine the right skill or tool to use.

A "COMPLETE" LEADER



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4 RELATIONSHIPS FOR LEADERS | 30m

1. Introduce the discussion on the 4 Relationships for Leaders.
2. Explain the purpose and learning objectives for this section.
3. Ask the question below and have participants respond verbally or in chat.
4. Transition to the Leadership Lesson, Dirty Laundry.

Q: In your opinion what does it mean to be a complete leader?

Talking Points

- Introduce the 4 Relationships to effective leadership.
- Explain how each relationship is unique and must be treated differently.
- Identify the behaviors to do and to avoid for each relationship.
- A complete leader is a leader who has strength and capability in four different types of relationships. These relationships require different types of skills. As a leader, it is important to have strength and capability in each of these four areas and quadrants vs. being lopsided and only having strength in one or two of the quadrants.
- A key objective for this session is to develop your understanding of these four types of relationships so you can strengthen and flex your muscles in all four quadrants.

LEADERSHIP LESSON #30 — DIRTY LAUNDRY



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Facilitator Note: We recommend Dirty Laundry #30, *Leadership Lessons* page 139
<https://stewartleadership.wistia.com/medias/lkuo5ibczn>.

If the Dirty Laundry story doesn't resonate for your audience, consider using these *Leadership Lessons*:

- Chains and Ribbons #7, page 47 <https://stewartleadership.wistia.com/medias/y3zdvjg2pu>
- Two Friends and a Giant #8, page 51 <https://stewartleadership.wistia.com/medias/78m9rn8ktd>
- Big Bear, Little Ego #25, page 119 <https://stewartleadership.wistia.com/medias/lszcz0bjdv4>

1. Play the selected video or read the story from *Leadership Lessons*.
2. If the participants have the books, point to where the story is located.
3. Transition and review the series of quotes on the importance of establishing relationships.

Talking Points

- This story illustrates how we often have blind spots that prevent us from seeing things clearly.
- As leaders, we may think we have the right answer, but perhaps we are viewing the world through a distorted or incorrect lens.
- Over the years, we have learned that one of our biggest blind spots as leaders is developing relationships with others. We need to view critical relationships correctly to build productive ones. In fact, effective leadership is grounded in effective relationships.
- We want to talk about how to manage our own blind spots to build effective relationships with others.



Because of the furious pace of change in business today, **difficulty to manage relationships sabotages more business than anything else**—it is not a question of strategy that gets us into trouble, it is a question of emotions.

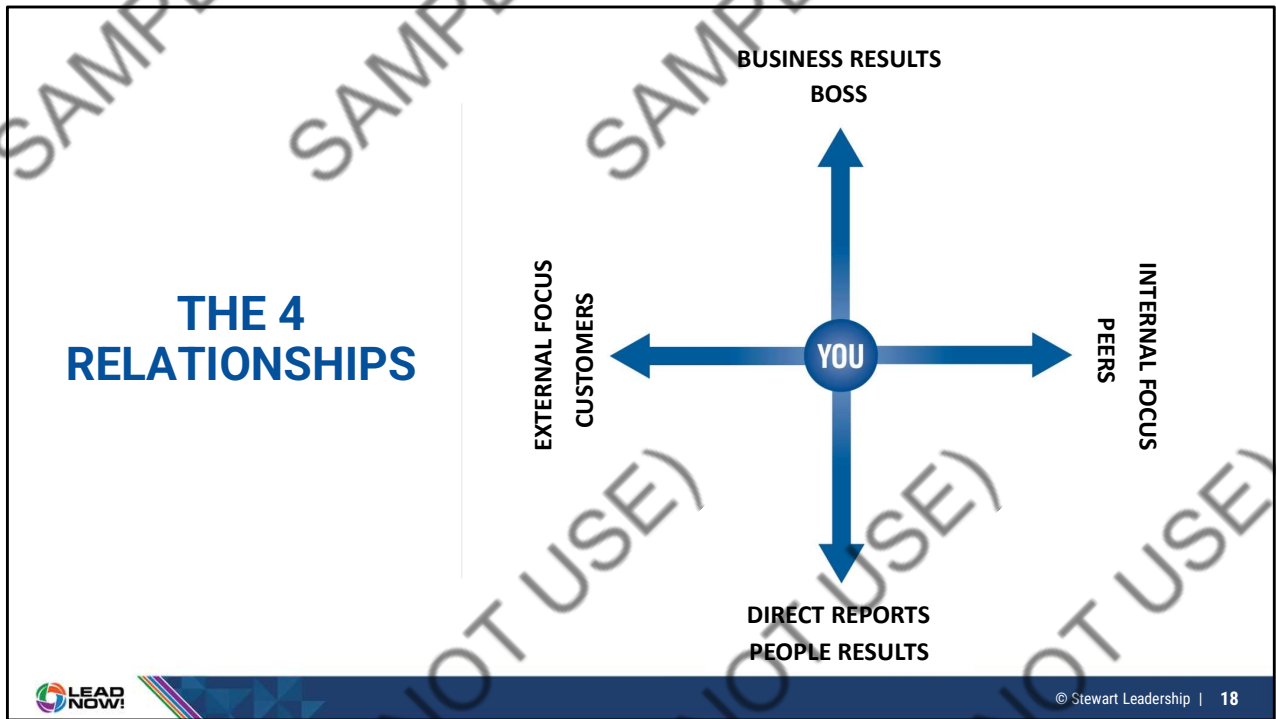
— John Kotter, Harvard Business School



1. Review the quote to reinforce the need to build effective relationships with others.
2. Transition and review the 4 Relationships for a leader to establish.

Talking Point

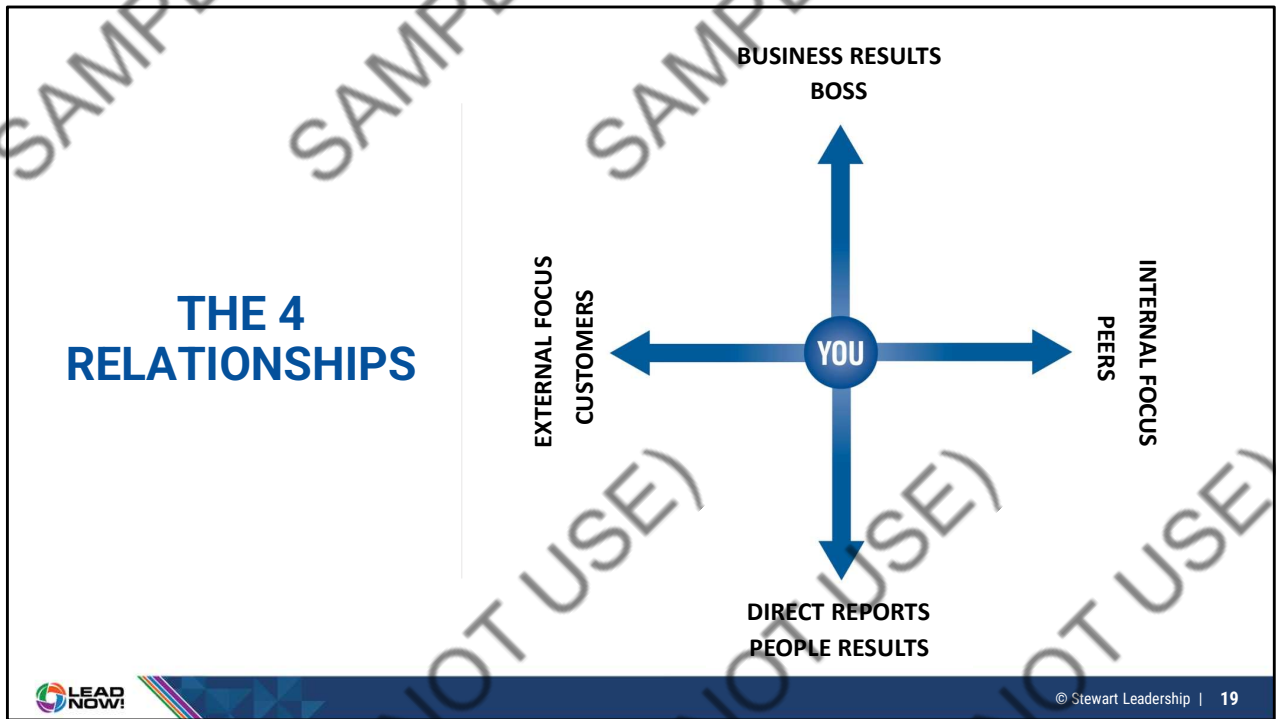
Difficulty managing relationships sabotages more business than anything else.



1. Introduce The 4 Relationships.
2. Describe the grid with The 4 Relationships and identify those relationships as the essential ones for leaders to manage.
3. Set up the breakout discussion.
 - Divide the session into 4 breakout groups.
 - Assign each group a relationship to discuss.
 - In their groups, participants should identify the primary needs of their assigned relationship. What are the things that they prioritize/focus on?
 - Have each group select a voice to share the top three or four needs the group identified.
4. Have them quickly brainstorm one-word needs for their group.
5. Allow **5 minutes** for the activity.

Talking Points

- Each relationship has a different perspective:
 - The **BOSS** is focused on business results.
 - **Direct Reports** are focused on people results.
 - **Peers** are focused on internal results.
 - The **Customer** is most concerned with external results.
- Now, we'll take a closer look at these four relationships. Later in this learning experience, we'll discuss the dimensions/behaviors within each quadrant that support our ability to develop these relationships.



1. Debrief to be sure the groups cover the talking points.
2. Allow **10 minutes** for the debrief.
3. Acknowledge the breakout summary from the groups.
4. Listen for the different perspectives/motives of each of The 4 Relationships as outlined in the talking points.
5. Transition to the Relationship Mapping individual activity.

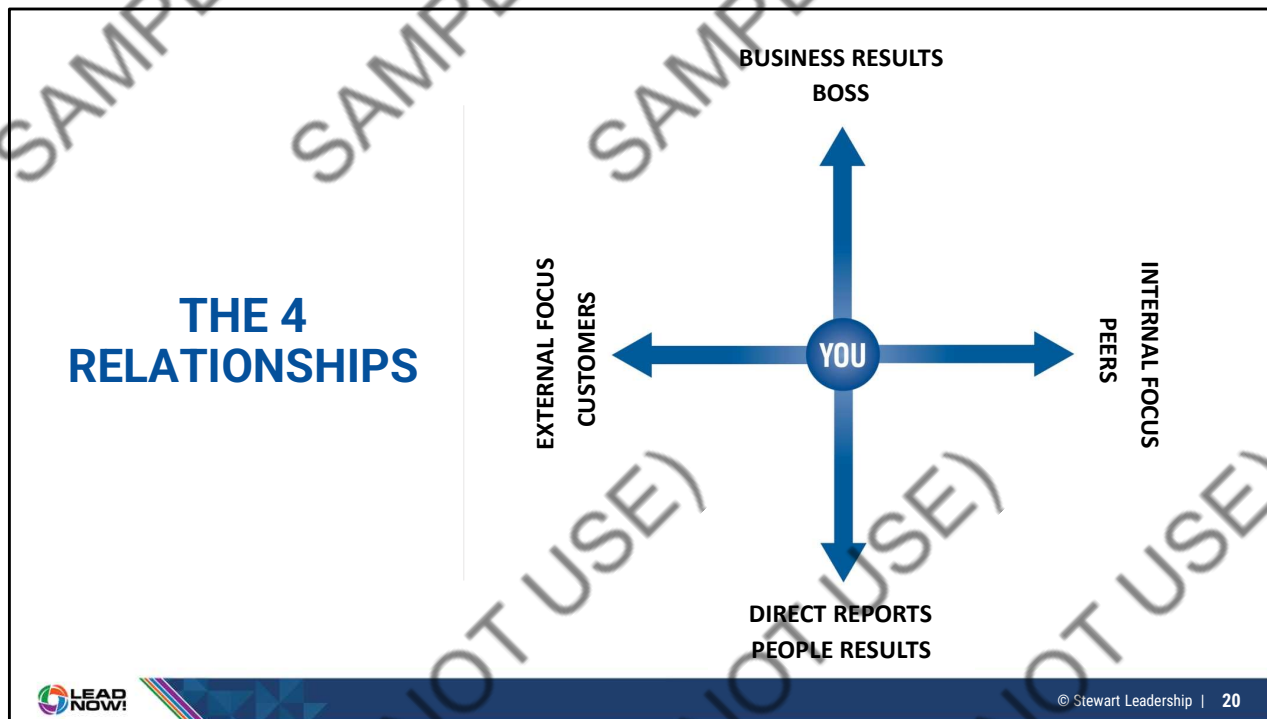
Talking Points

The language for your **Boss** should almost always include an emphasis on **Business Results**.

- To build an effective relationship with your boss and upper management, use the language of business results.
- Your boss is focused on performance and expects you to deliver it.
- Business results are primarily what your boss is evaluated on—what will deliver their success. You might not like this reality, but it is the nature of things.
- You need to convey how you will achieve these results in your communication with your boss. If you are not putting business results at the center of your conversations with your boss, you are likely not speaking the language they understand and care most about.

The language for your **Direct Reports** should almost always include an emphasis on **People Results**.

- To build a relationship with your direct reports, use the language of people results.
- Your employees are focused on how the dynamics of the team are going, the level of engagement, how they are being developed, and how talent is being promoted on the team.
- Your team members want feedback and communication and to work in an environment that challenges and rewards.
- Yes, they also care about the performance outputs, but focusing on people results in your communication will get at the heart of what they care most about. It will help you speak their language.



Talking Points (continued)

The language for your **Peers** should almost always include an emphasis on the **Internal Focus** doings/workings of the organization.

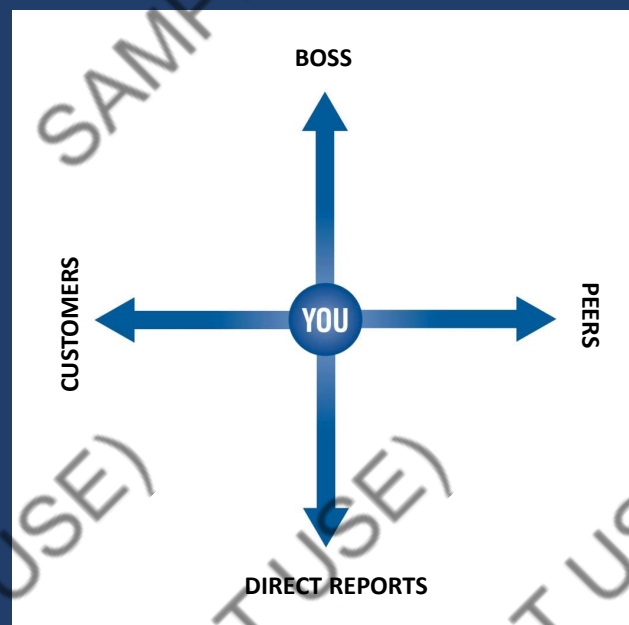
- To build a relationship with your peers, use the language of internal focus.
- Peers are concerned with how resources are being allocated and how work is being done internally.
- They want clarity on handoffs, transparency in budgeting, and a desire to partner to make things work better.
- Talking about team engagement may build some good will, but speaking about improving day-to-day work patterns and negotiating resources in a fair manner will get at the heart of what peers value.

The language for your **Customers** should almost always include an emphasis on the **External Focus** doings/workings of the organization.

- To build a strong relationship with your customers, use the language of external focus.
- This concerns the broader marketplace in identifying the competitive landscape, industry trends, and current and future customer needs.
- Customers are less concerned about how something is produced or if the team is happy.
- Customers want to be assured that you know their concerns and hopes. They want to see action in satisfying their needs, even if it is a small amount.
- They also want to hear ideas on how their wants will be addressed in a cheaper, faster, or quicker manner.
- This is the language of external focus that builds effective relationships with key stakeholders and customers outside the organization.

RELATIONSHIP MAPPING

- Using the plus diagram, list your significant relationships by name
- For each person, identify the following:
 - What they value
 - Their perception of you
 - How frequently you interact with them



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1. Introduce the Relationship Mapping activity.
2. Direct participants to their guides.
3. Explain the activity.
 - Using the cross diagram, list your significant relationships by name.
 - For each person, identify:
 - What they value
 - Their perception of you
 - How frequently you interact with them
4. Allow **5-8 minutes** of individual activity time.
5. Encourage them to continue this before the next session and identify one business partner to meet with to better understand their perceptions and values.
6. Discuss a few of the questions below and have participants respond verbally or in chat.
7. Transition to What Is It Like to Work for Me? activity.

Q: How easy or difficult was this exercise?

Q: For most of your relationships, were you able to identify what they value?

Q: Were you able to confidently articulate their perceptions of you?

Q: Are there people on your list that you do not interact with frequently? Was it difficult for you to identify what these people value?

Q: Are there gaps in your different types of relationships? Do you have more of one vs. another?

LEADERSHIP GEM #10

— WHAT IS IT LIKE TO WORK FOR ME?



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1. Read the *Leadership Gem #10, What Is It Like to Work for Me?* on page 61.
2. Explain that this Gem provides us with good insight on the importance of understanding what it's like to work for you from your direct reports' perspective. How you perceive yourself and how others perceive you are not always the same!
3. Ask the reflection questions below and transition to the LEAD NOW! Model.

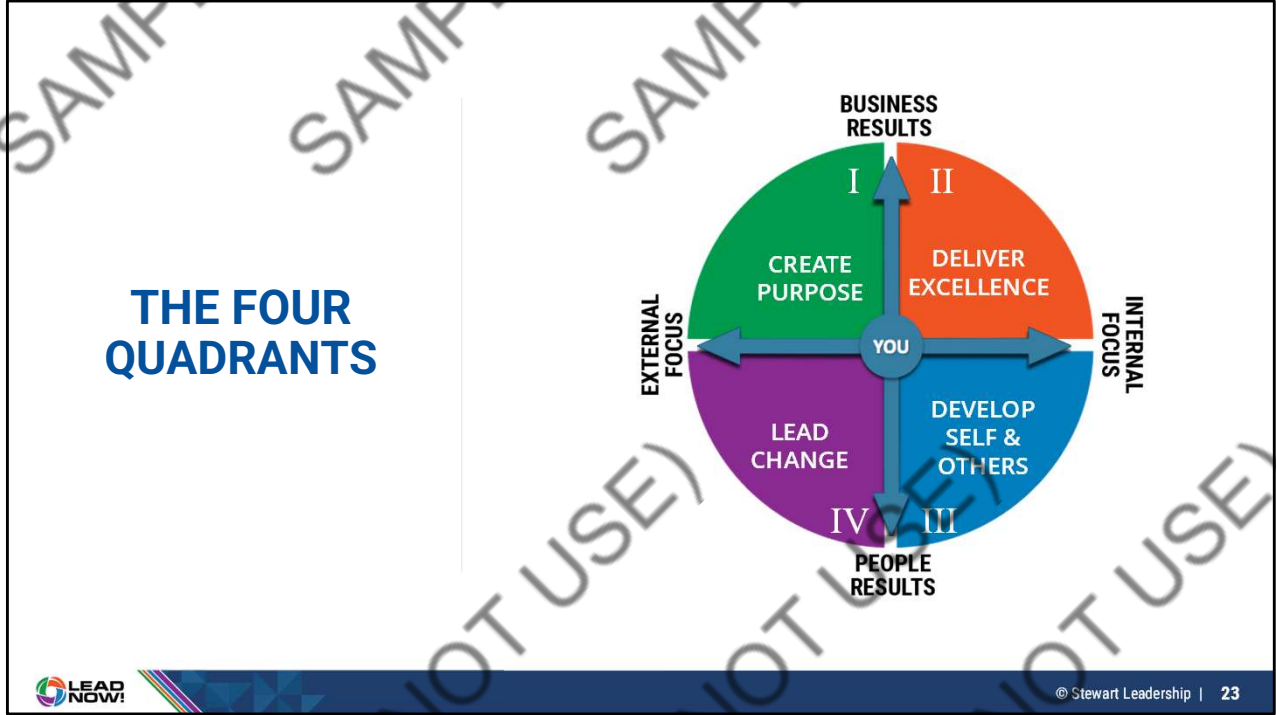
Q: Are you aware of your strengths and areas that need improvement? Has your perception been validated by others?

Q: Do you genuinely invite and welcome feedback from others regarding desirable skills and talents and your liabilities?

Q: How do you initially react when you learn of areas you need to address? Do you justify and rationalize? Or do you try to understand and apply the feedback to improve and fully address appropriate and needed changes?

Talking Points

- Asking the difficult but revealing question, "What is it like to work for me?", will push you outside of your own mental framework and help you consider how others perceive you.
- The perceptions of your people are the ones that matter most.
- How you react when others share their points of view sends a powerful signal to them.
- Keep what it's like to work for you at the front of your mind as we go through the learning experience together.



LEAD NOW! MODEL | 20m

1. Explain the objectives for the session:
 - Describe the model.
 - Illustrate where the four quadrants connect.
 - Understand the data that built it.
 - Outline the dimensions within each quadrant.
2. Review the quadrants with the talking points below.
3. Have the participants reflect on the leaders they see.
4. Transition to the Iron Cross story.

Q: How many of your leaders are good in both business and people results?

Have participants respond verbally or in chat.

Talking Points

- Where each axis meets, a quadrant is created that identifies what is expected for a leader.
 - Where Business Results meets External Focus, the quadrant is **Create Purpose**.
 - Where Internal Focus meets People Results, the quadrant is **Develop Self and Others**.
 - Where People Results meets External focus, that quadrant is **Lead Change**.
 - Where Internal Focus meets Business Results, that quadrant is **Deliver Excellence**.
- A leader must be capable or have strength in each of the four areas; otherwise, they can be very uneven or lopsided in how they lead.
- Let's look at some data that support the LEAD NOW! Model.

THE IRON CROSS

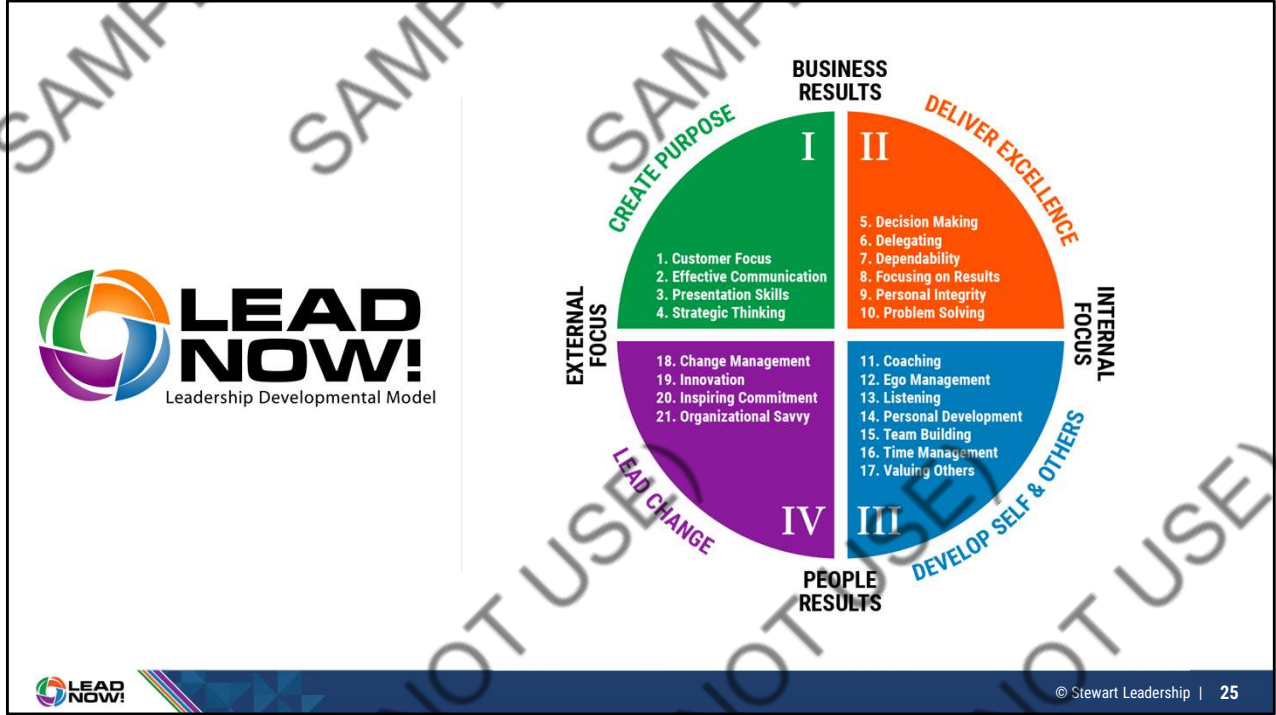


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1. Share The Iron Cross story.
2. Transition to the LEAD NOW! Model.

Talking Points

- To do this incredibly challenging move, this gymnast must have great strength, endurance, and symmetry along his four axis points: his left hand, his right hand, his head and neck, and his torso and legs.
- If any of those four points fail, then he falls.
- Just like the gymnast must have strength in all four points, an effective leader must build capability in each of the four quadrants to be a successful leader.



1. Read each dimension in each quadrant.
2. Transition to review data points on What Makes a Great Leader?

Talking Points

- Now, we take it one more step into 21 leadership dimensions or competencies where a leader can develop and improve their leadership ability.
- Each quadrant has four to seven leadership dimensions.
- The model is designed to help leaders build iron cross-strength and be able to effectively lead and deliver both business and people results.
- The model is designed to achieve business and people results and to help people act now; not think about acting sometime in the future.

WHAT MAKES A GREAT LEADER?

A survey of 60,000 leaders was conducted to identify what characteristics of a leader combine to affect employee perceptions of whether the boss is a “great” leader or not.

14%

If a leader was seen as being very strong on business results, the chance of that leader being seen as a great leader was ____%.

12%

If a leader was seen as strong on social skills, the chance of that leader being seen as a great leader was ____%.

72%

If a leader was strong in both business results **and** social skills, the likelihood of being seen as a great leader was ____%.

How many of your leaders are good in both business and people results?

Source: Harvard Business Review, “Should Leaders Focus on Results, or on People?,” Matthew Lieberman, Dec 27, 2013



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1. Introduce the discussion on the survey data that supports the LEAD NOW! Model.
2. Review the questions without the percentages on the slide.
3. Ask individuals to guess the percentages before revealing them.
4. Acknowledge responses.
5. Build the slide to reveal the answers.
6. Have participants reflect on leaders they see using the questions below and have them respond verbally or in chat.
7. Transition to effectiveness data.

Q: How many of your leaders are good in both business and people results?

Q: What makes them good in both areas?

WHICH QUADRANT IS TYPICALLY THE LOWEST?



1. Begin to delve into each quadrant.
2. Ask the question about the challenging quadrant, but don't have the participants vote yet.
3. Transition to the drill-down review of each quadrant.

Q: Which quadrant do you believe is the most challenging for leaders?

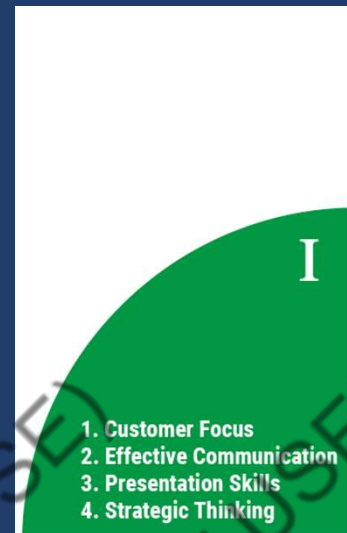
Talking Points

- We have data!
- From our database and a sample of 2,000 leader assessment surveys, we can share which was consistently ranked the most challenging for leaders.
- Let's look at each of them and then you can vote.

QUADRANT I: CREATE PURPOSE

A leader must be responsible for defining vision and strategy. This involves:

- Knowing the competition
- Understanding the customer
- Analyzing marketplace trends
- Setting strategy
- Communicating effectively with others



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1. Introduce Quadrant I, Create Purpose.
2. Review the dimensions within the quadrant quickly.
3. Transition to Quadrant II.

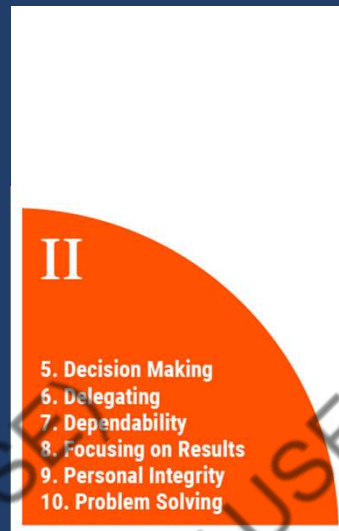
Talking Points

- A leader must be responsible for defining vision and strategy and this involves:
 - Knowing the competition
 - Understanding the customer
 - Analyzing marketplace trends
 - Setting strategy
 - Communicating effectively with others
- The critical skills part of creating purpose are the dimensions 1-4.

QUADRANT II: DELIVER EXCELLENCE

A leader must be responsible for delivering operational excellence and translating strategy into day-to-day execution. This involves:

- Clear decision-making
- Delivering results
- Building consistent and measurable processes
- Continuous improvement
- Behaving with integrity



1. Introduce Quadrant II, Deliver Excellence.
2. Review the dimensions within the quadrant quickly.
3. Transition to Quadrant III.

Talking Points

- A leader must be responsible for delivering operational excellence and translating strategy into day-to-day execution and this involves:
 - Clear decision-making
 - Delivering results
 - Building consistent and measurable processes
 - Continuous improvement
 - Behaving with integrity
- The critical skills part of delivering excellence are dimensions 5-10.

QUADRANT III: DEVELOP SELF & OTHERS

A leader must value learning for self and others. This involves:

- Personal improvement opportunities
- Building and managing team dynamics
- Honing technical expertise
- Managing time
- Coaching and developing others
- Managing one's ego

- 11. Coaching
- 12. Ego Management
- 13. Listening
- 14. Personal Development
- 15. Team Building
- 16. Time Management
- 17. Valuing Others

III



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1. Introduce Quadrant III, Develop Self & Others.
2. Review the dimensions within the quadrant quickly.
3. Transition to Quadrant IV.

Talking Points

- A leader must value learning for self and others and this involves:
 - Personal improvement opportunities
 - Building and managing team dynamics
 - Honing technical expertise
 - Managing time
 - Coaching and developing others
 - Managing one's ego
- The critical skills part of developing self and others are dimensions 11-17.

QUADRANT IV: LEAD CHANGE

A leader must create and champion change that benefits the organization. This involves:

- Influencing key decision makers
- Sponsoring change projects
- Empowering stakeholders
- Encouraging innovation
- Managing resistance
- Sustaining change

18. Change Management
19. Innovation
20. Inspiring Commitment
21. Organizational Savvy

IV



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1. Introduce Quadrant IV, Lead Change.
2. Review the dimensions within the quadrant quickly.
3. Set up and display the poll. [If conducting this session in person, use a show of hands.]
4. Transition to the most challenging quadrant.

Poll: Which of these quadrants was the lowest scoring in our database?

- Quadrant I: Create Purpose
- Quadrant II: Deliver Excellence
- Quadrant III: Develop Self & Others
- Quadrant IV: Lead Change

Talking Points

- A leader must create and champion change that benefits the organization and this involves:
 - Influencing key decision makers
 - Sponsoring change projects
 - Empowering stakeholders
 - Encouraging innovation
 - Managing resistance
 - Sustaining change
- The critical skills part of delivering excellence are dimensions 18-21.
- Now that we've covered all quadrants, let's stop and think about the question I asked earlier. We have a large database of 360 assessments where leaders were evaluated by their teams, peers, and partners. Where do you think leaders scored the lowest?

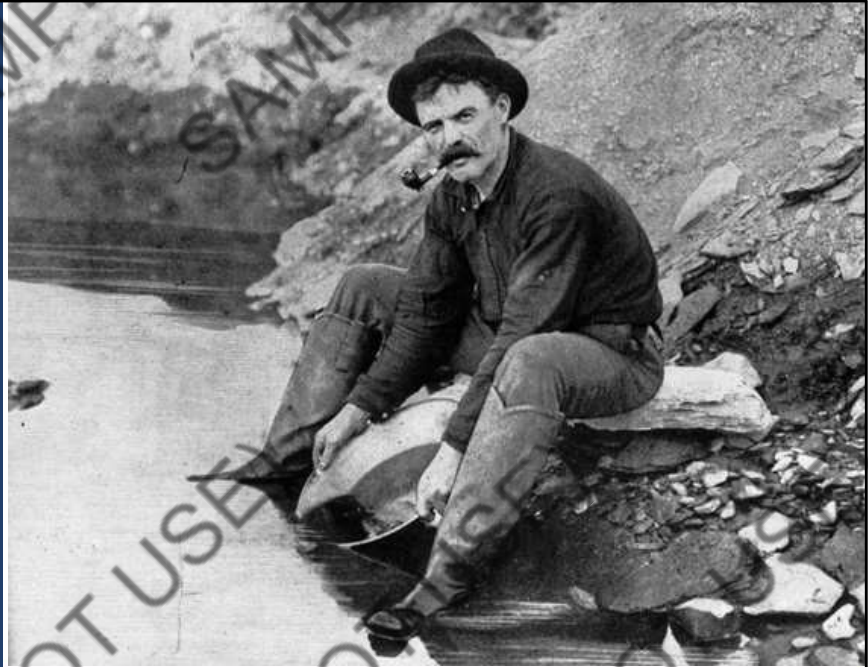


1. Acknowledge the poll results.
2. Reveal the quadrants, one at a time, from most effective to least effective.
3. Take away Deliver Excellence and keep going until Lead Change is left.
4. Transition to the Flecks of Gold story.

Talking Points

- The most effective is **Deliver Excellence**; maybe not so surprising because this is what many people believe is the point of the job.
- There is a large gap between Create Purpose and Develop Self & Others.
- We don't focus on People Results quadrants as much, and we need to make sure we focus on them to be more complete leaders, and flex our muscles in all four areas.
- If you find **Leading Change** hard, know that you are in good company. It's the lowest scoring quadrant in our database.

FLECKS OF GOLD



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Q: As leaders, how do we improve ourselves? Where do we start?

1. Share the Flecks of Gold story.
2. Transition to the Stewart Leadership book series.

A story is told of a merchant in 1849 who was caught up in California Gold Rush fever. He sold his store and all his possessions and trekked across America to the gold fields of California to seek his fortune. He had dreams of the rivers in California being filled with gold nuggets so big that they could barely be carried. Day after endless day, the young man dipped his pan into the river and came up empty. His only reward was a growing pile of rocks. Discouraged and broke, he was ready to quit. However, one day, an old, experienced prospector said to him, "That's quite a pile of rocks you got there, my boy."

The young man replied, "There's no gold here. I'm going back home. I'm finished." Walking over to the pile of rocks, the wise old prospector said, "Oh, there's gold all right in these dirty rocks. You just have to know where to find it." The old-timer then picked up two of the rocks from the pile and smashed them together. One of the rocks split open, revealing several flecks of gold sparkling in the sunlight.

Noticing a bulging leather pouch fastened to the prospector's waist, the young man said, "No, I'm not looking for flecks of gold. I'm looking for large chunks of gold like the ones you have in your pouch!" The old prospector extended his pouch toward the young man, who looked inside expecting several large shiny nuggets, but was stunned to see that the pouch was filled with thousands of small flecks of gold. The old prospector said, "Son, it seems to me you are so busy looking for large nuggets that you're missing filling your pouch with these precious flecks of gold. The patient accumulation of these little flecks has brought me great wealth."

Talking Points

- It is common for leaders to look for a single experience that will vault them to success; the unique moment that qualifies them as a complete leader. But like the merchant, they misunderstand how true leadership is created. Real and lasting improvements in one's skill level and leadership talents are developed one small step at a time. From small and simple things, major gains occur.
- This session will help you get to "California" and the "gold mine." We will give you tools to mine for your gold, but it's up to you to put in the effort to become a better leader. You must put in the work to find your flecks of gold!

STEWART LEADERSHIP BOOK SERIES



Explains LEAD NOW! Model



Provides tools and resources for the time-starved leader



© Stewart Leadership | 34

1. Introduce the Stewart Leadership Book Series
2. Have participants locate the books sent to them, if applicable.
3. Show how the *LEAD NOW!* book is organized and used.
4. Have participants close that book and stress that these are resources to be used!
5. Continue with the *52 Leadership Lessons* and *52 Leadership Gems* books.
6. Transition to the Insights Journal.

LEAD NOW! Talking Points

- To help you find your flecks of gold, let's review some award-winning tools, known as the Stewart Leadership Book Series. The series was written to help time-starved leaders quickly identify and start developing their leadership capabilities.
- To start, select one or two leadership dimensions to focus on. For example, let's all focus on Dimension #2, Effective Communication. Turn to that dimension chapter in the *LEAD NOW!* book.
- You'll see the basic structure for each of the dimension chapters: they each have a quote at the top, the LEAD NOW! Model with its respective dimension in bold, an overview, and let the tips begin.
- There are dozens and dozens of tips. Some of these may be old favorites that you have been applying for years. Others may be great ideas you set aside and others might be new suggestions that are ripe for experimentation.
- As you flip through the coaching tips, keep going until you see the References section. These are additional book resources that may help you in this specific dimension.
- After the resources, there is a short self-assessment you can take. I like to call this a "self-conversation" to see how you're doing in the critical behaviors that make up this dimension.
- The next two pages provide space to write down your action plan—the behaviors you want to focus on and how you will do that.
- You heard me! Shut the book. Most people get a little alarmed when I say this, but the point of the book is not to keep reading, but to start putting the tips into action now!
- It's time to implement immediately and begin seeing the improved results of your leadership. Now, of course you can keep reading and get more ideas, but the point is to put the information to work. That's why the book is called *LEAD NOW!*

52 Leadership Gems and 52 Leadership Lessons Talking Points

- The other two books were written to provide additional insights and actions for leaders.
- The *52 Leadership Gems* book is comprised of one-line wise sayings and the *52 Leadership Lessons* book has inspirational stories that leaders can use with themselves and their teams.
- Both books are indexed to the LEAD NOW! Model and can be used to support each participant's action plans.
- You will recognize stories you heard today.

INSIGHTS JOURNAL



© Stewart Leadership | 35

INSIGHTS JOURNAL | 5m

1. Introduce the Insights Journal.
2. Direct participants to their guides.
3. Ask individuals to take **2-3 minutes** to write down any key learnings or takeaways from today's discussions.
4. Prompt them with the questions below.
5. Transition to the assignments for the next session.

Q: What stories or Gems were powerful you today? Why?

Q: What quadrants do you most want to work on in our learning experience?

Q: What relationships will you most want to focus on?

Q: What is it like to work for you?

Q: How open to feedback are you? How do you react when you hear it?



ACTIONS

- Choose a classmate as an accountability partner
- Email me your partner's name
- Identify leadership Gems to share
- Check in on one key relationship
- [Leadership series reading]
- [Assessment instructions]



NEXT STEPS | 15m

Facilitator Note: Customize this content based on the specifics of the consulting arrangement:

- Have them review the books purchased for them.
 - Insert the assessment resource that applies: coaching cards, self-assessment, 360 assessment.
 - Provide relevant time frames for the assessment.
1. Review the actions participants should complete before the next session.
 2. Transition to the next session agenda.

Talking Points

- Your actions are your "Extended Learning Opportunity."
- Identify one key relationship and plan to check in and prepare to report back. Focus on gaining a better understanding of your business partners' perceptions and values and how you will grow the relationship.
- The work you do to learn and reflect between these sessions is as important if not more than the work we do in class.
- It's critical to protect the time and follow through. This is where your accountability partner will help!

NEXT SESSION: AGENDA

- Welcome
- Gems Board
- LEAD NOW! Assessment Activity
- 5 Steps of Personal Change
- Leadership Myths
- IAP
- Next Steps



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1. Review the agenda for the next session.
2. Address questions.
3. Thank participants for their active engagement.
4. Transition to the How Are You Feeling? check-in.

Talking Points

- In our next session, we will start with a very quick review of our ground rules and objectives plus the actions you completed between sessions.
- Then we'll move into a review of leadership Gems, so be prepared to share. By the time we finish, everyone will have shared one of their Gems.
- We'll start with a deep dive into the LEAD NOW! assessment experience and debrief your assessment and insights.
- Then, we'll move discuss the 5 steps of personal change to help you prepare to build your action plan.
- Next, we'll unpack leadership myths, again with an eye to building your personal plan.
- We'll end by starting your Individual Action Plan, or IAP. This will be a working document that you will continue to evolve throughout this experience and beyond.
- Before we leave, we'll review the actions you should take between sessions.

HOW ARE YOU FEELING?



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1. Revisit the hopes and concerns that you mentioned at the beginning of the session and identify how the session addressed them.
2. Ask the questions below.
3. Personalize a wrap-up of the session as you think it's needed.

Q: How are you feeling as a leader at the end of the day?

Q: What are one or two insights you had today?

Talking Points

- Individual contributions
- Observations
- Importance of personal development—one of the leadership dimensions we learned about
- The value of your accountability partners
- Make time to work on your plan



Remind participants of the date and time for the next session.



LEAD NOW! All Access

LEAD NOW! MODULE ONE

**SAMPLE
PARTICIPANT
GUIDE**



**LEAD
NOW!**

EXPERIENCE

SESSION **1**
— PARTICIPANT GUIDE



**ANY AND ALL REPRODUCTION OF THIS
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Activity: Who Are YOU?	7
What Is a Complete Leader?	8
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The 4 Relationships Dos and Don'ts	10-11
Activity: Relationship Mapping	12
LEAD NOW! Model	13
Gems Board	14
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WELCOME TO THE LEAD NOW! WORKSHOP

WORKSHOP DESCRIPTION

LEAD NOW! is an engaging and inspiring leadership experience. Using the LEAD NOW! Leadership Development Model from the award-winning book of the same name, time-starved leaders learn what successful leadership looks like, what their personal leadership strengths are, and how to develop their areas of opportunity.

The LEAD NOW! Experience is built on leadership principles and content that has been proven with thousands of leaders over four decades at Fortune 500 and mid-size companies, government agencies, and start-up organizations throughout the world. It enables each leader to leave with tools and insights to immediately make a difference in leading others and achieving desired organizational results.



WORKSHOP BENEFITS FOR PARTICIPANTS

- Define what is required to be a successful leader and to deliver desired results.
- Learn how to build effective relationships with one's boss, direct reports, peers, and customers.
- Identify how others perceive you and your individual leadership strengths and opportunities.
- Build leadership capability to achieve business results while improving team commitment and developing others.
- Build your reputation as someone who can effectively lead others.
- Prepare for future leadership opportunities.
- Develop an Individual Action Plan for immediate application.

WORKSHOP OBJECTIVES

LEARN HOW TO BE A COMPLETE LEADER THROUGH THE LEAD NOW! LEADERSHIP DEVELOPMENT MODEL

- Develop an awareness of your development opportunities as identified by your assessment.
- Build your skills in each of the four quadrants of the LEAD NOW! Model.
- Create an Individual Action Plan (IAP).
- Have fun, learn from each other, and leave a better leader!



BE PRESENT



BE POSITIVE



BE OPEN

1. **Be present**, both mentally and physically. Let's all agree to silence and perhaps turn off our mobile devices and close our email and other programs to keep us focused on what is going on here in the classroom. Let's also be back online physically, when asked.
2. **Be positive.** We are here to solve problems. We are here to focus on solutions to produce something positive in the end. We are here to work together—to collaborate, discuss ideas, and apply our learnings together.
3. **Be open** to new ideas and the ideas of others. Judgment is not invited to this session. The floor is open to all to share ideas and challenge each other respectfully.

ABOUT STEWART LEADERSHIP

Stewart Leadership is an international leadership, talent, and change management consulting, coaching, and training company. They have been building leaders for Fortune 500 companies, government agencies, and start-ups for over 40 years. They created the LEAD NOW! Leadership Development Model and have written three award-winning books to help leaders throughout the world achieve better business and people results!



Daniel Stewart John Parker Stewart Peter Stewart

JOHN PARKER STEWART, FOUNDER & CEO

- Over the past 40 years, John has coached and trained tens of thousands of leaders worldwide including CEOs, presidents, executives, plus military, government, and business leaders.
- He specializes in team performance, executive development, change management, orals coaching, and leadership development. He was twice selected National Trainer of the Year by the Association for Talent Development (ATD).
- John has published many articles, manuals, and workbooks and has published the award-winning Stewart Leadership Series, which includes *LEAD NOW! A Personal Leadership Coaching Guide for Results-Driven Leaders*.

DANIEL J. STEWART, PRESIDENT

- Daniel J. Stewart is a sought-after talent management and leadership development consultant and coach with proven experience advising senior leaders, leading change, and designing leadership-rich organizations.
- Over the past 20 years, he has been an internal and external organizational development executive and consultant delivering talent and team development solutions, executive leadership coaching, group facilitation, change management, organizational design, and strategic planning.
- He is the co-author of the award-winning book, *LEAD NOW! A Personal Leadership Coaching Guide for Results-Driven Leaders*, which was awarded First Place by the National Indie Excellence Book Award for best leadership book published over the last 5 years. He has also published articles in *Executive Excellence*, *Practicing OD*, *Proposal Management*, and *HR.com*.

PETER K. STEWART, MANAGING PARTNER

- Peter K. Stewart, PhD, is an experienced business psychologist specializing in leadership consulting, coaching, and training. He has ongoing oversight over the Stewart Leadership family of assessments, including the LEAD NOW! Self-Assessment and LEAD NOW! 360° Assessment.
- Over the last 20 years, with his unique blend of insightful psychological and business perspectives, Peter has helped hundreds of individuals in diverse settings and professional positions achieve success in their personal growth and leadership development.
- In addition to individual leadership coaching, consulting, and delivery of training for clients, Peter also supervises assessment integration and certification for coaches within Stewart Leadership.

ACTIVITY: WHO ARE YOU?

- Your first task is to draw an image (or create something using paper, pipe cleaners, or Legos) that describes who you are as a leader.
 - When you finish, you will be asked to introduce yourself and explain your creation along with your:
 - Name
 - Title
 - Organization
 - One hope for the workshop
 - One concern for the workshop
 - Creation and who you are as a leader
 - You will have 10 minutes for this activity.
-

WHAT IS A COMPLETE LEADER?

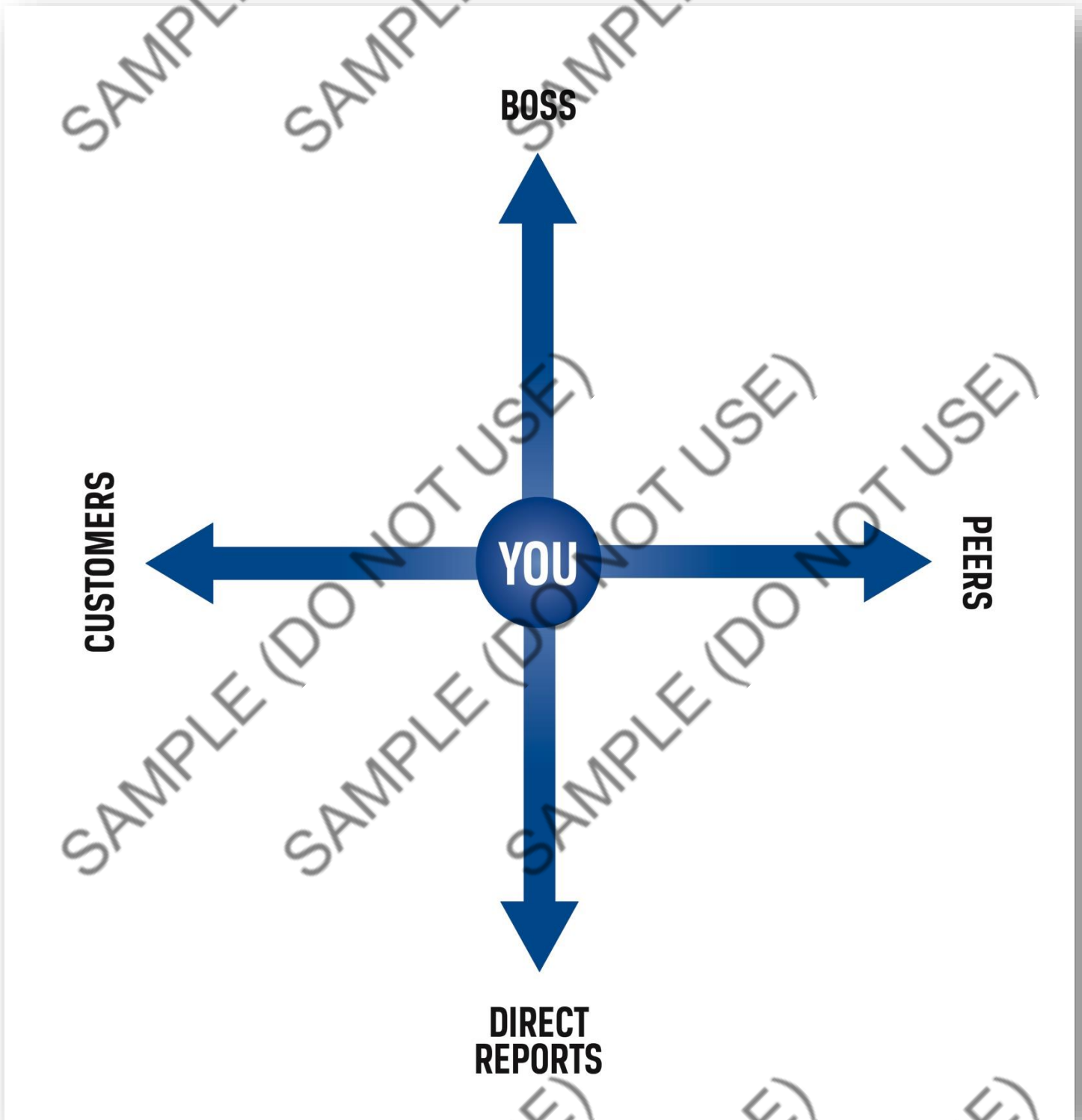
In your opinion, what does it mean to be a "complete leader"?



SAMPLE (DO NOT USE)
SAMPLE (DO NOT USE)
SAMPLE (DO NOT USE)

(DO NOT USE)
(DO NOT USE)
(DO NOT USE)

THE 4 RELATIONSHIPS FOR LEADERS



THE 4 RELATIONSHIPS DO'S AND DON'TS

Boss	<p>What to Do</p> <ul style="list-style-type: none"> Set a clear strategic direction and align it with the organization. Help others feel connected to the organization's purpose and future. Have the necessary skills and knowledge to effectively perform job duties. Be open to feedback and adjust behavior accordingly. Bring your best game each day.
	<p>What Not to Do</p> <ul style="list-style-type: none"> Provide lots of surprises. Overcommit and under-deliver. Complain without offering a solution. Underprepare for meetings. Ignore their pressures and aspirations.
Direct Reports	<p>What to Do</p> <ul style="list-style-type: none"> Leverage the strengths of each team member. Treat others with dignity and respect. Create a working environment that motivates high individual performance. Be loyal to your people. Reduce obstacles and reduce their struggle in doing their jobs.
	<p>What Not to Do</p> <ul style="list-style-type: none"> Act like you are the smartest person in the room. Take all the credit but shift all the blame. Provide inconsistent or shifting priorities and expectations. Tear down those on your team (in public or behind their backs). Feel like you must always make the decision.

<p style="text-align: center; font-size: 24px; color: white;">Peers</p>	<p style="text-align: center;">What to Do</p> <ul style="list-style-type: none"> • Follow through on actions, promises, and assignments. • Accept responsibility for your own actions and the actions of your team. • Communicate a compelling vision for partnering together. • Demonstrate high ethical standards. • Openly share knowledge and insights.
	<p style="text-align: center;">What Not to Do</p> <ul style="list-style-type: none"> • Compete against them to see who is better. • Try to be in charge and tell them what to do. • Hoard resources and information. • Get frustrated and allow your emotions to go unfiltered. • Avoid them to the detriment of your own team.
<p style="text-align: center; font-size: 24px; color: white;">Customers</p>	<p style="text-align: center;">What to Do</p> <ul style="list-style-type: none"> • Align business goals to customer goals. • Be fair and open about issues and concerns. • Know when to stop analyzing an issue and make a decision. • Apologize and identify possible solutions. • Live, lead, manage, and work with integrity.
	<p style="text-align: center;">What Not to Do</p> <ul style="list-style-type: none"> • Hide behind a policy and not listen to their needs. • Regard them as just another transaction, instead of a longer relationship. • Ignore the competition or the alternatives they may have. • Assume you already know their wants and needs. • Avoid answering hard questions.

ACTIVITY: RELATIONSHIP MAPPING

ACTIVITY INSTRUCTIONS

- Using the cross diagram, list your significant relationships by name.
- For each person, identify:
 - What do they value?
 - What is their perception of you?
 - How frequently do you interact with them?





LEAD NOW!

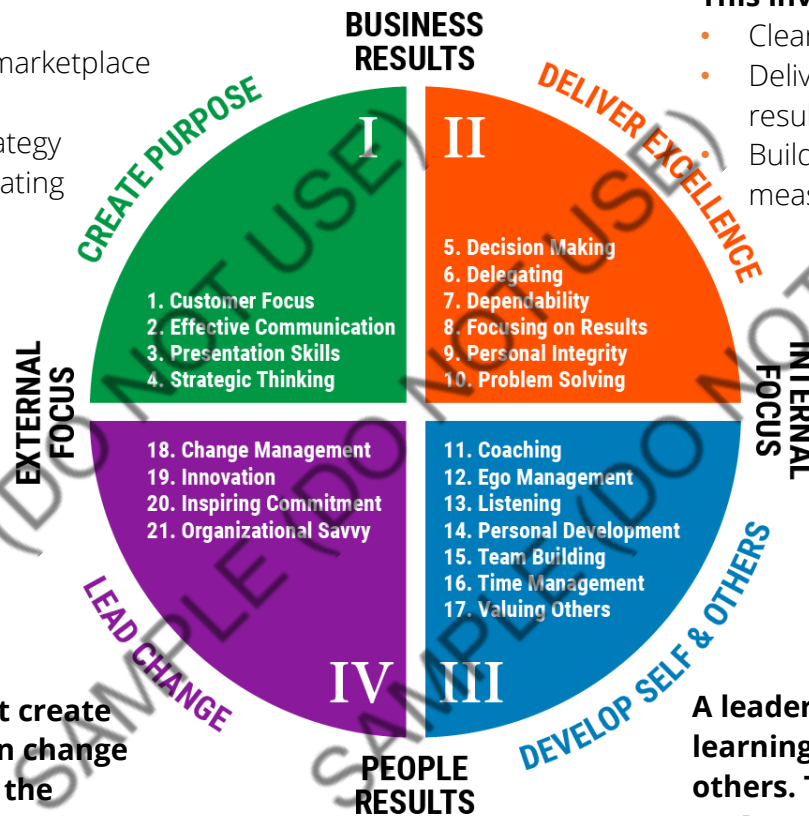
Leadership Developmental Model

A leader must be responsible for defining vision and strategy. This involves:

- Knowing the competition
- Understanding the customer
- Analyzing marketplace trends
- Setting strategy
- Communicating

A leader must be responsible for delivering operational excellence and translating strategy into day-to-day execution. This involves:

- Clear decision-making
- Delivering operational results
- Building consistent and measurable processes



A leader must create and champion change that benefits the organization. This involves:

- Influencing key decision makers
- Sponsoring change projects
- Empowering stakeholders

A leader must value learning for self and others. This involves:

- Personal improvement opportunities
- Building and managing team dynamics
- Honing technical expertise
- Managing time
- Coaching and developing others

GEMS BOARD

What Gems have influenced your leadership journey?



SAMPLE (DO NOT USE)

SAMPLE (DO NOT USE)

SAMPLE (DO NOT USE)

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INSIGHTS JOURNAL

Use the Insights Journal on the following pages to capture any key thoughts or insights relative to each quadrant and the dimensions.



Insights Journal

SAMPLE (DO NOT USE)
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LEAD NOW! All Access

LEAD NOW! MODULE ONE

**SAMPLE
SLIDE
DECK**

LEADERSHIP DEVELOPMENT EXPERIENCE

Session 1

[Facilitator Name]

[Date]



STEWART
LEADERSHIP



AGENDA

- **Welcome | Overview**
 - Introductions | Objectives | Ground Rules
 - About Stewart Leadership
 - Experience Overview
 - Who Are You?
- **Leadership Gems**
- **4 Relationships for Leaders**
- **LEAD NOW! Model**
- **Insights Journal**
- **Next Steps**

PLACEHOLDER FOR CLIENT LOGO AND CLIENT- SPECIFIC CONTENT



OBJECTIVES



Learn to become
a complete
leader



Develop
awareness



Build your
skills



Create an
Individual
Action Plan
(IAP)

GROUND RULES



BE PRESENT



BE POSITIVE

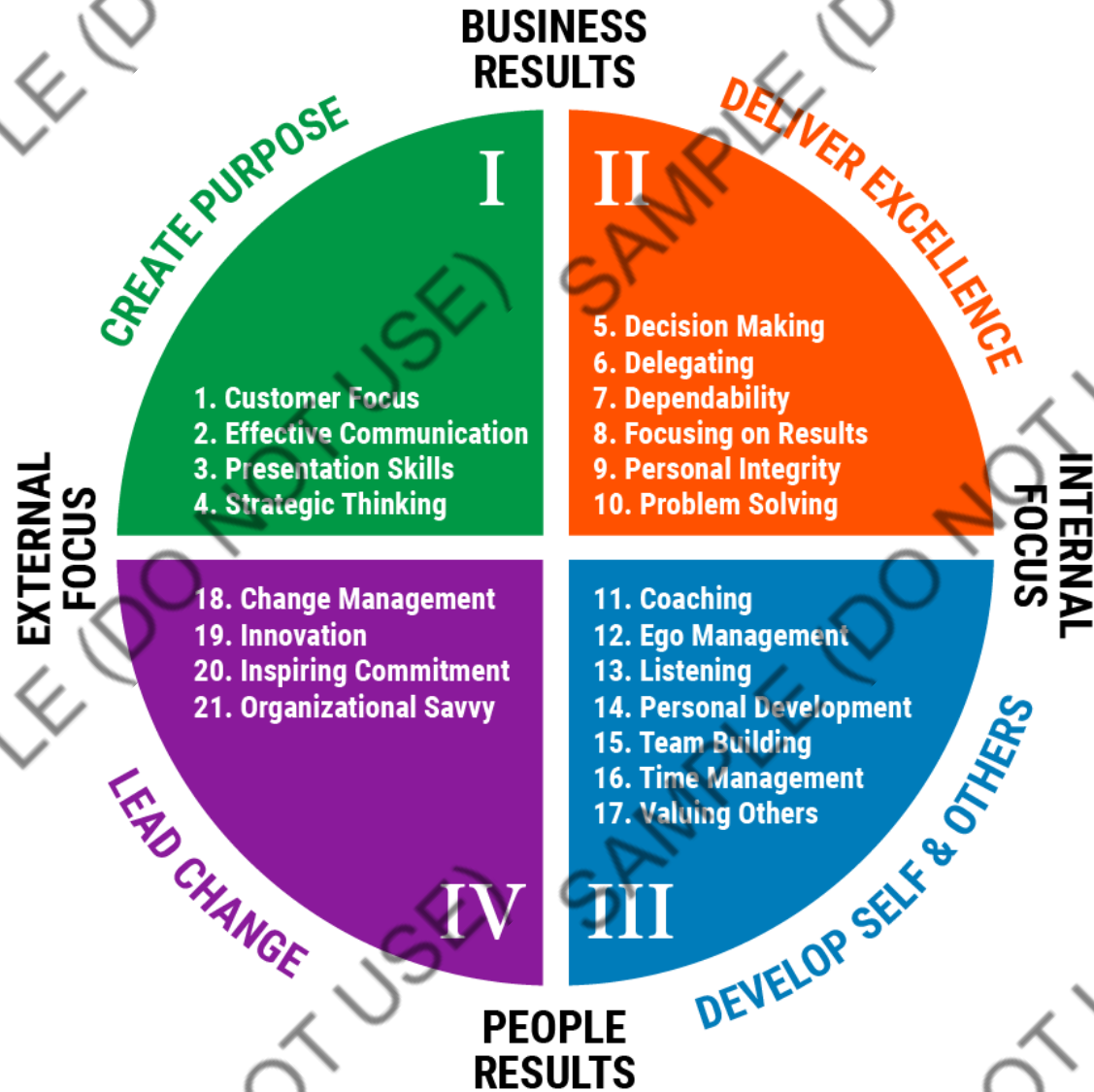


BE OPEN



LEAD NOW!

Leadership Developmental Model



STEWART

LEADERSHIP

Stewart Leadership is an international consulting firm with over 40 years of experience specializing in:

- Leadership Development
- Teaming
- Change Management
- Talent Development

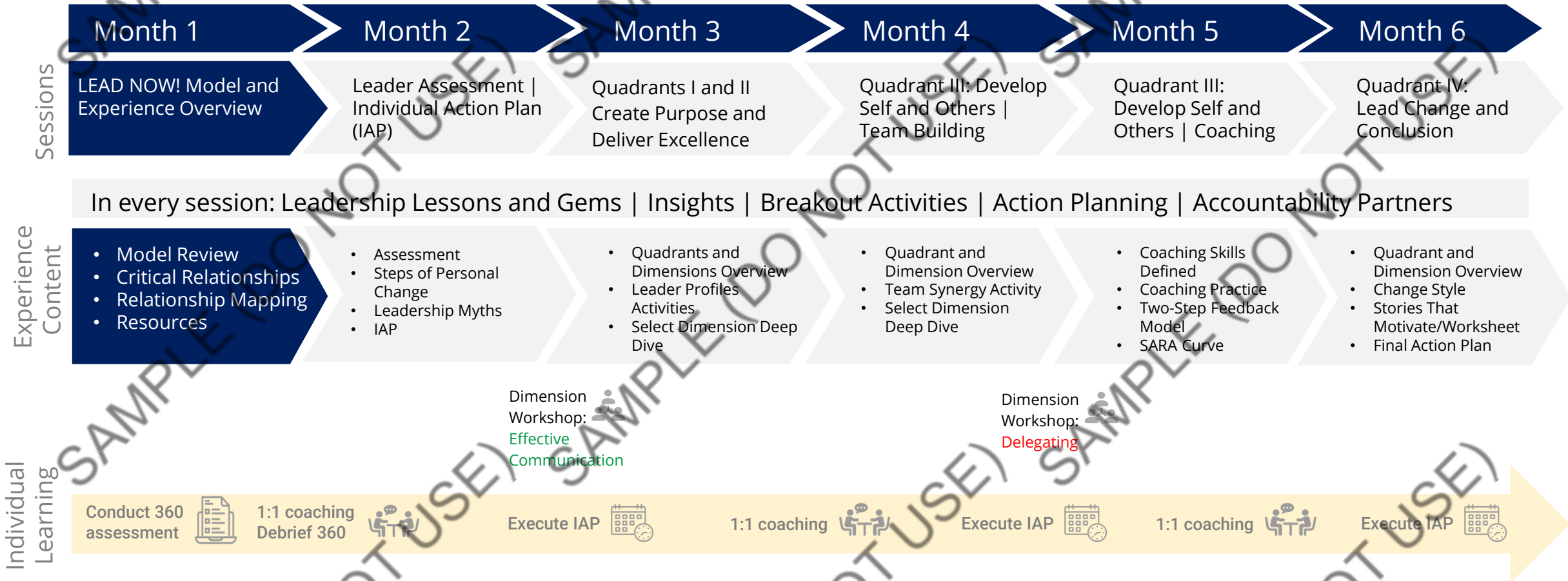


Daniel Stewart

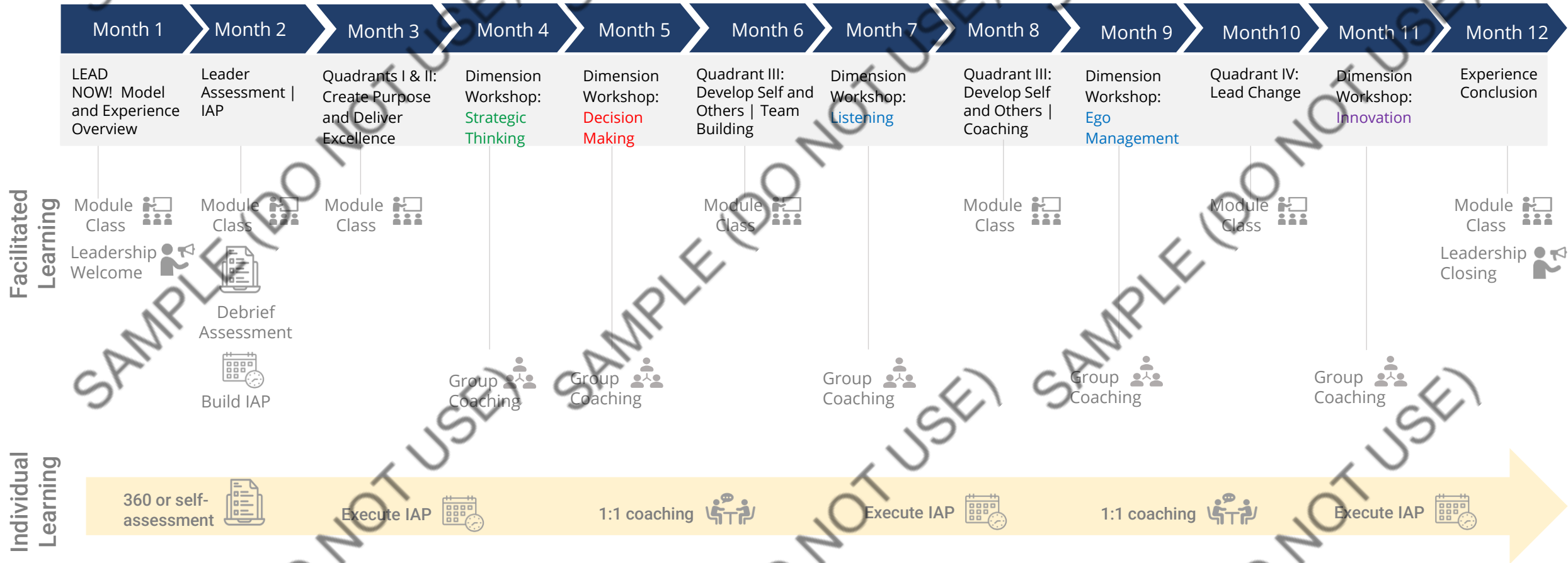
John Parker Stewart

Peter Stewart

EXPERIENCE OVERVIEW



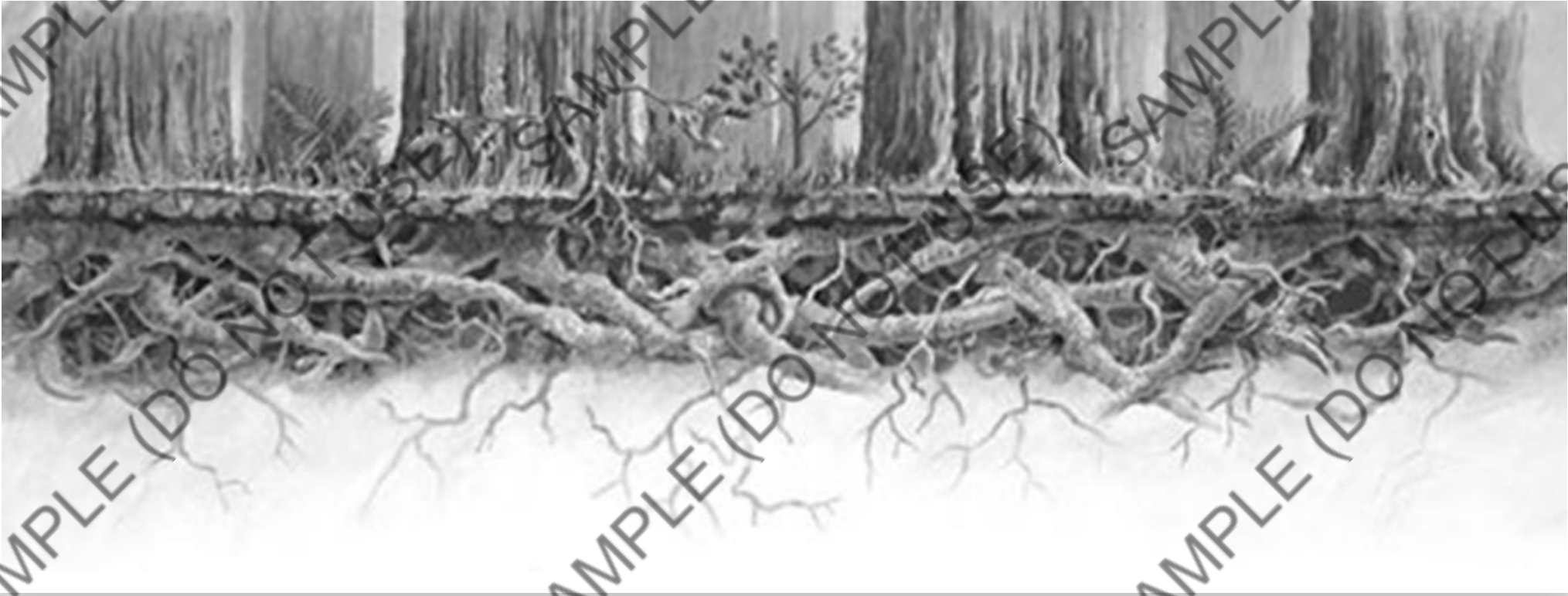
EXPERIENCE OVERVIEW



SAMPLE (DO NOT USE)

LEADERSHIP LESSON #48 — THE ROOTS OF A GIANT







**WHO
ARE YOU?**

GEMS BOARD



What Gems have influenced your leadership journey?



**LEADERSHIP
GEM #38**
—
**JUST
BECAUSE...**



A “COMPLETE” LEADER



LEADERSHIP LESSON #30

—

DIRTY LAUNDRY

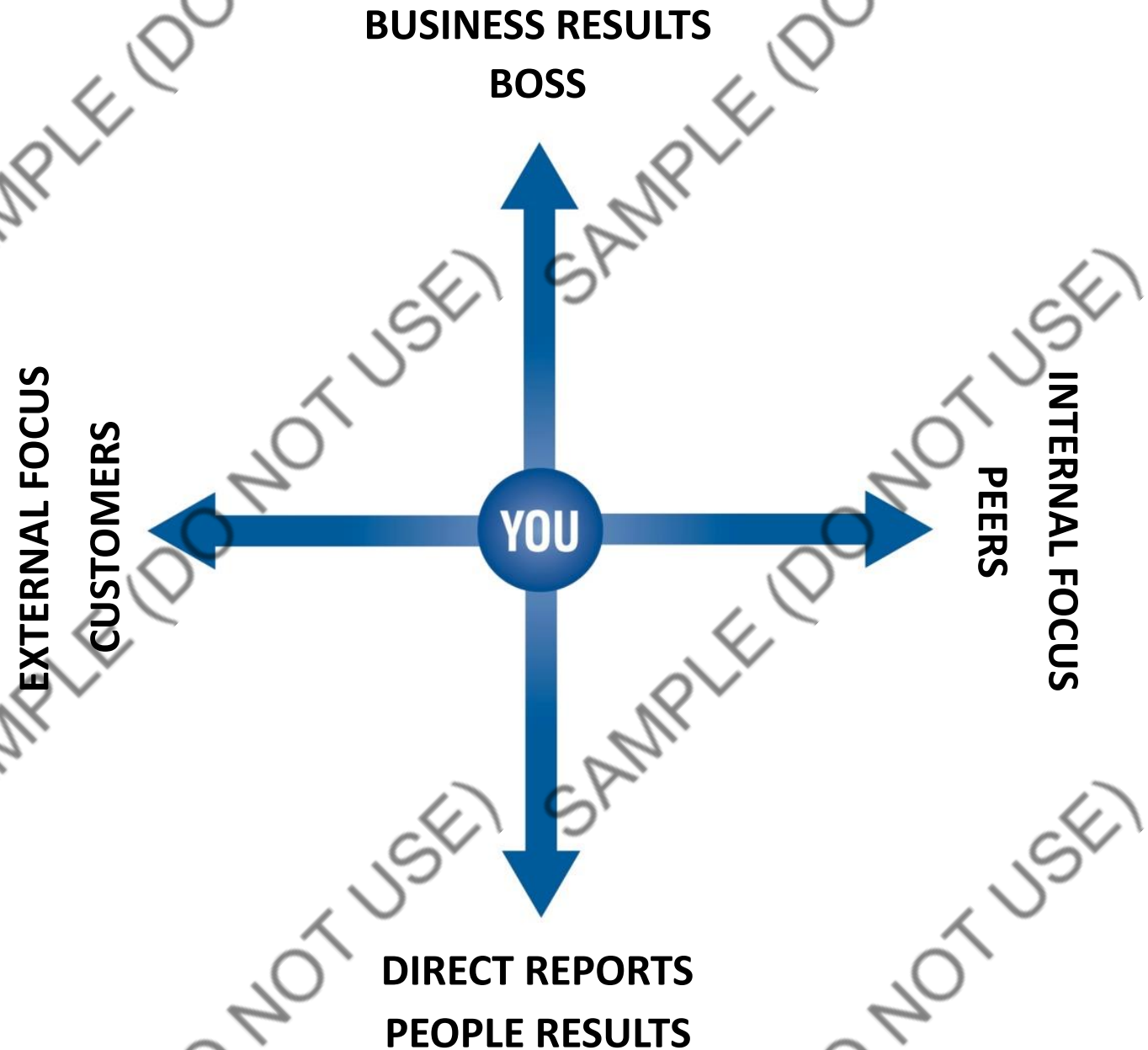




Because of the furious pace of change in business today,
**difficulty to manage relationships sabotages more
business than anything else**—it is not a question of
strategy that gets us into trouble, it is a question of
emotions.

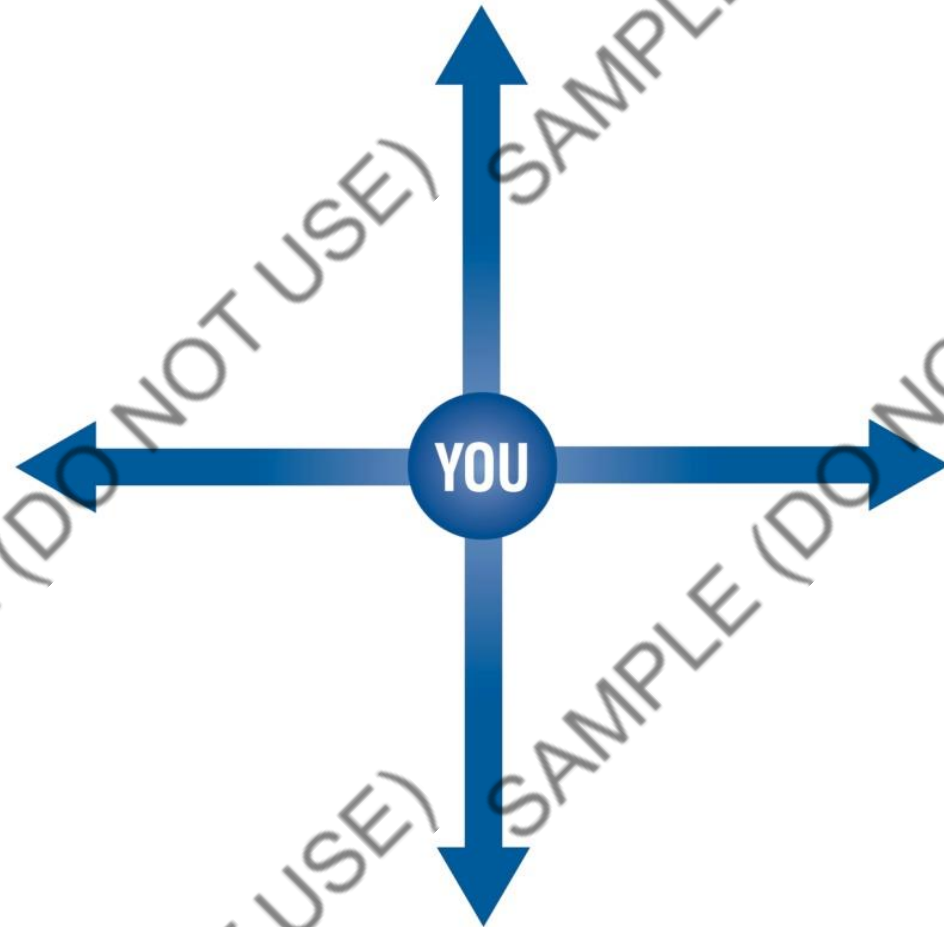
– John Kotter, Harvard Business School

THE 4 RELATIONSHIPS



THE 4 RELATIONSHIPS

EXTERNAL FOCUS
CUSTOMERS



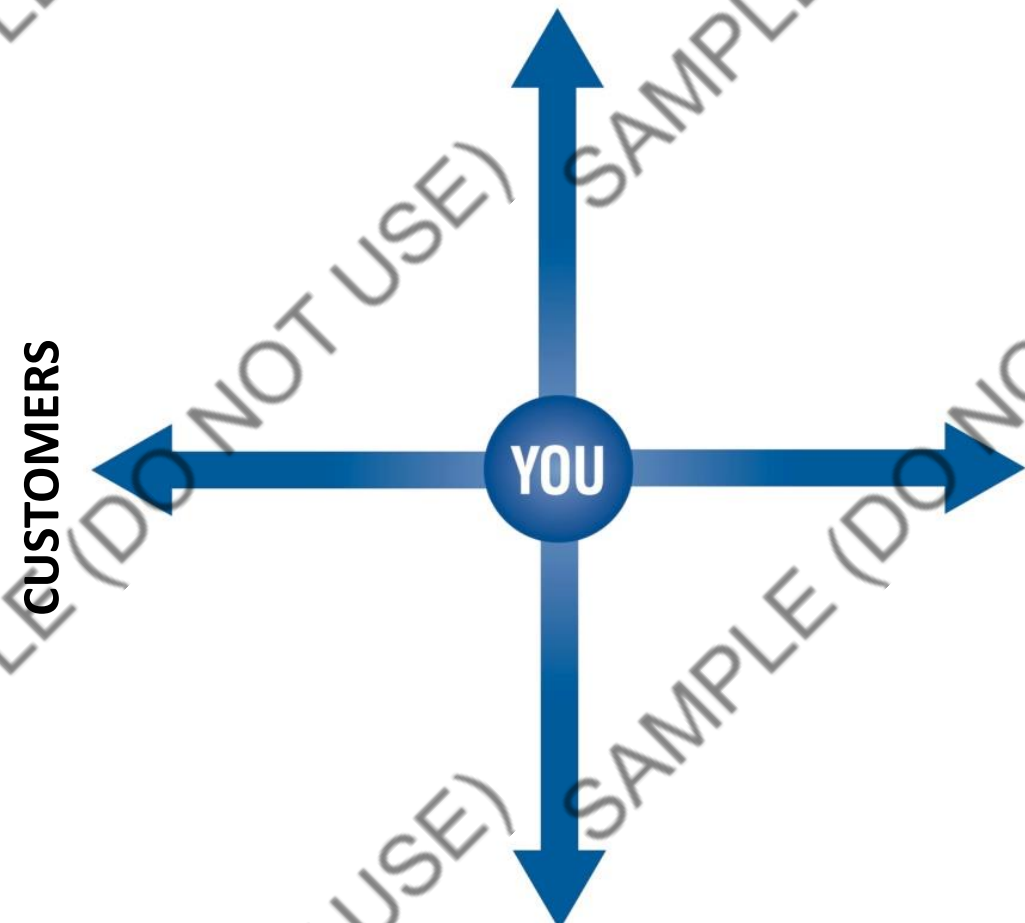
INTERNAL FOCUS
PEERS

BUSINESS RESULTS
BOSS

DIRECT REPORTS
PEOPLE RESULTS

THE 4 RELATIONSHIPS

EXTERNAL FOCUS
CUSTOMERS



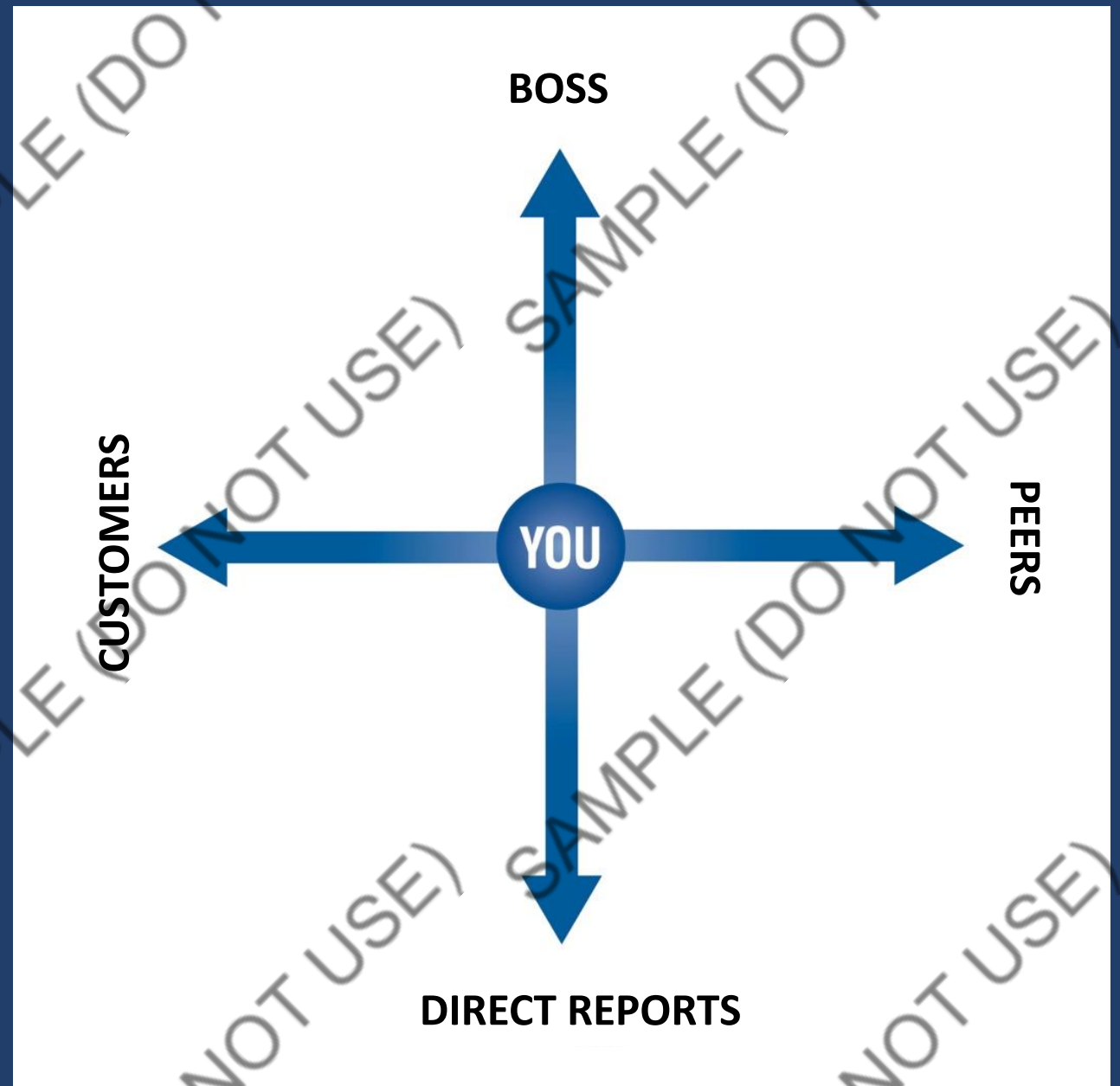
BUSINESS RESULTS
BOSS

INTERNAL FOCUS
PEERS

DIRECT REPORTS
PEOPLE RESULTS

RELATIONSHIP MAPPING

- Using the plus diagram, list your significant relationships by name
- For each person, identify the following:
 - What they value
 - Their perception of you
 - How frequently you interact with them

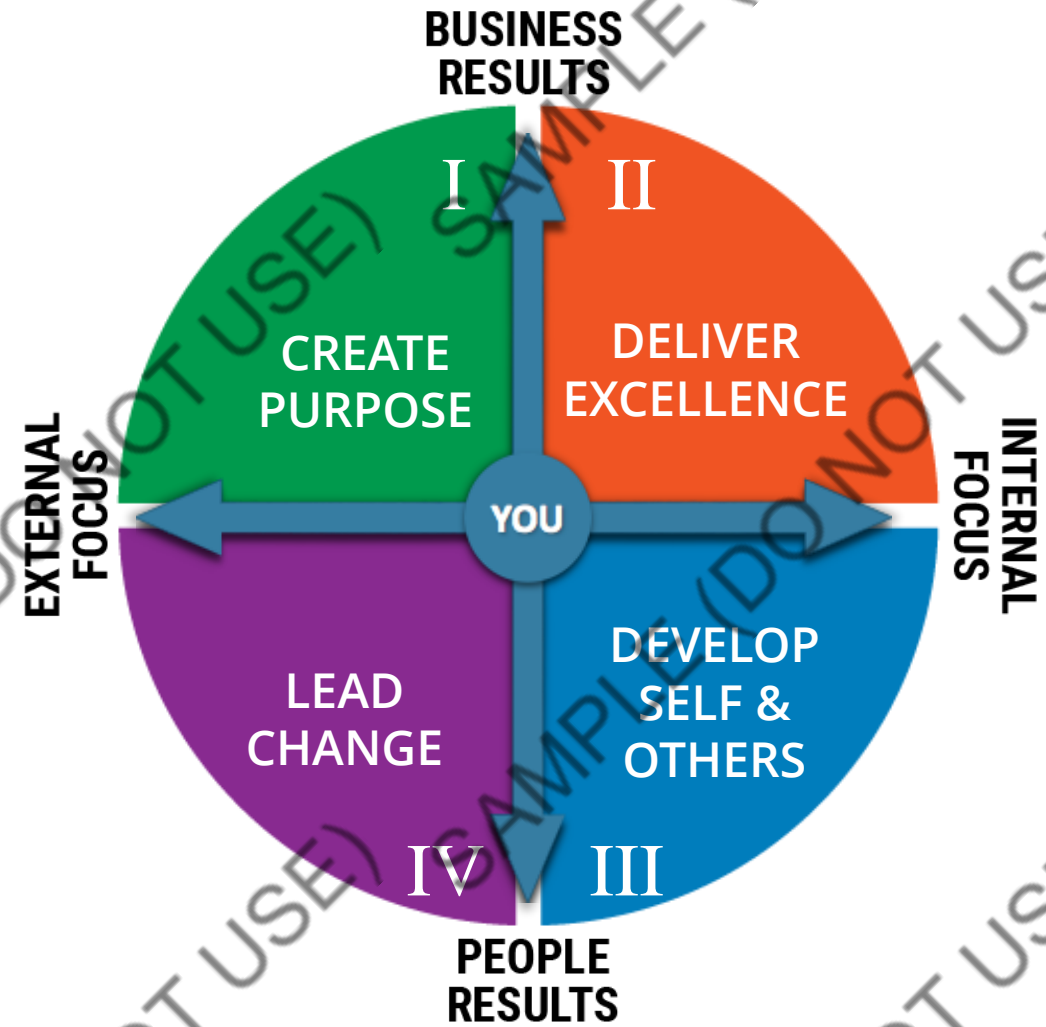


LEADERSHIP GEM #10

—
WHAT IS IT
LIKE TO
WORK FOR
ME?



THE FOUR QUADRANTS



THE IRON CROSS





LEAD NOW!

Leadership Developmental Model



WHAT MAKES A GREAT LEADER?

A survey of 60,000 leaders was conducted to identify what characteristics of a leader combine to affect employee perceptions of whether the boss is a “great” leader or not.

14%

If a leader was seen as being very strong on business results, the chance of that leader being seen as a great leader was ____%.

12%

If a leader was seen as strong on social skills, the chance of that leader being seen as a great leader was ____%.

72%

If a leader was strong in both business results **and** social skills, the likelihood of being seen as a great leader was ____%.

How many of your leaders are good in both business and people results?

Source: *Harvard Business Review*, “Should Leaders Focus on Results, or on People?,” Matthew Lieberman, Dec 27, 2013

WHICH QUADRANT IS TYPICALLY THE LOWEST?



QUADRANT I: CREATE PURPOSE

A leader must be responsible for defining vision and strategy. This involves:

- Knowing the competition
- Understanding the customer
- Analyzing marketplace trends
- Setting strategy
- Communicating effectively with others



QUADRANT II: DELIVER EXCELLENCE

A leader must be responsible for delivering operational excellence and translating strategy into day-to-day execution. This involves:

- Clear decision-making
- Delivering results
- Building consistent and measurable processes
- Continuous improvement
- Behaving with integrity

II

5. Decision Making
6. Delegating
7. Dependability
8. Focusing on Results
9. Personal Integrity
10. Problem Solving

QUADRANT III: DEVELOP SELF & OTHERS

A leader must value learning for self and others. This involves:

- Personal improvement opportunities
- Building and managing team dynamics
- Honing technical expertise
- Managing time
- Coaching and developing others
- Managing one's ego

11. Coaching
12. Ego Management
13. Listening
14. Personal Development
15. Team Building
16. Time Management
17. Valuing Others

III

QUADRANT IV: LEAD CHANGE

A leader must create and champion change that benefits the organization. This involves:

- Influencing key decision makers
- Sponsoring change projects
- Empowering stakeholders
- Encouraging innovation
- Managing resistance
- Sustaining change

18. Change Management
19. Innovation
20. Inspiring Commitment
21. Organizational Savvy

IV

THE ANSWER IS...



FLECKS OF GOLD



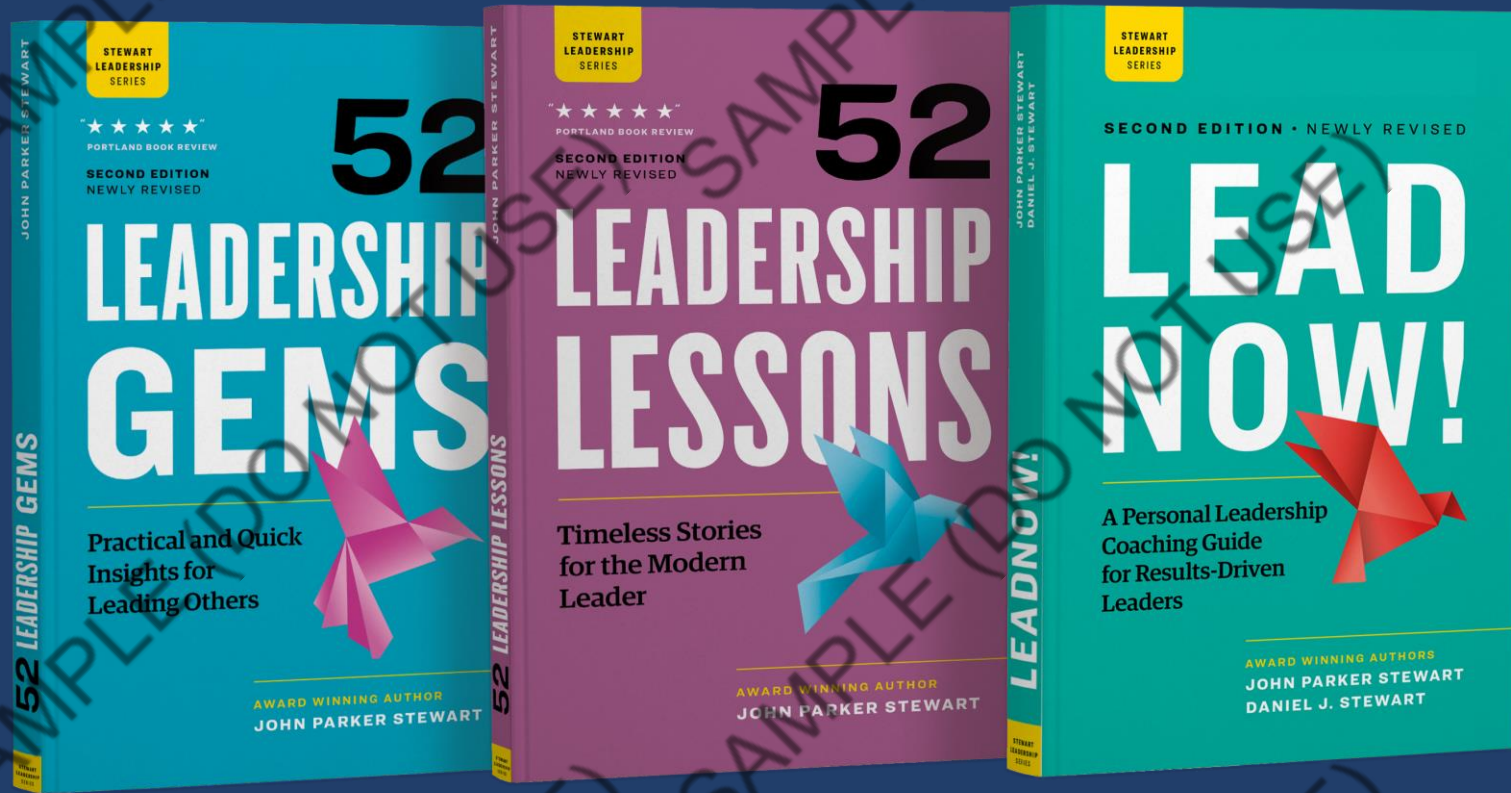
STEWART LEADERSHIP BOOK SERIES



Explains LEAD NOW! Model



Provides tools and resources for the time-starved leader



INSIGHTS JOURNAL





ACTIONS

- Choose a classmate as an accountability partner
- Email me your partner's name
- Identify leadership Gems to share
- Check in on one key relationship
- [Leadership series reading]
- [Assessment instructions]

NEXT SESSION: AGENDA

- Welcome
- Gems Board
- LEAD NOW! Assessment Activity
- 5 Steps of Personal Change
- Leadership Myths
- IAP
- Next Steps



HOW ARE YOU FEELING?





**See you
next time!**