



CONGRATS! YOU'VE BEEN PROMOTED

THE WORKBOOK

Exercises, templates, and practice tools to accompany
*Congrats! You've Been Promoted: An Essential Guide for
Helping New Leaders and Their Teams Succeed*

NOEL MASSIE

This workbook belongs to _____

HOW TO USE THIS WORKBOOK

Leadership is a skill, and how much skill you have in anything is directly connected to how much time you've spent developing it. This workbook gives you a place to do that work.

Every exercise from the book is collected here, chapter by chapter, with room to write your answers. Alongside them you'll find fill-in tools built from the methods the book teaches: the Four Steps to Establishing the Second Impression, Stop-Pause-Listen, the 4:1 Feedback Ratio, the 7 Steps for Effective Direct Training, the B.E.S.T. Principle, the 4x5 Method, and the Daily Meeting Script.

EXERCISE Taken directly from the book. The page number tells you where to find it.

TOOL A reusable template built from a method in the book. Photocopy these and use them on the job.

REFLECTION A short prompt added for chapters that don't end with an exercise.

A FEW SUGGESTIONS

- **Read the chapter first.** Each section opens with a short recap, but the stories in the book are what make the lessons stick.
- **Be honest.** Some exercises ask about your biases, your mistakes, and the people you don't trust. No one else needs to see this book.
- **Practice out loud.** Several exercises ask you to record yourself or work with a partner. Don't skip them. When we do something repeatedly, we retain it at a much higher rate.
- **Come back to it.** Revisit your answers after 90 days in your role. Notice what has changed.

CONTENTS

PART ONE

The Terms and Conditions of Values-Based Leadership

1	Understanding Your Own and Your Team's Terms and Conditions	5
2	A Fair Exchange	9
3	Personal Ethics—Do the Right Thing	11
4	Listening—A Skill or a Value?	13
5	Integrity—Your Crown Jewel	16
6	Trust	18
7	Providing Consistent Feedback	20
8	Ownership and Taking Responsibility	24

PART TWO

The Fine Print: Putting Values-Based Leadership into Practice

9	Building Employees' Skills and Keeping Your Team	27
10	Directional Communication	32
11	The B.E.S.T. Principle	34
12	The 4x5 Method	37
13	Daily Messaging with Your Team	42
	My Leadership Commitments	45
	Notes	46

PART ONE

**THE TERMS AND CONDITIONS
OF VALUES-BASED LEADERSHIP**

UNDERSTANDING YOUR OWN AND YOUR TEAM'S TERMS AND CONDITIONS

THE BIG IDEA

Every relationship comes with terms and conditions—the expectations people have about how they will be treated. As a new leader, there are no casual moments: your team is evaluating you from the very first interaction. Learn their terms and conditions, meet the influencers first, and use one-on-ones to set the tone deliberately.

“Leaders act in ways consistent with their beliefs.”

EXERCISE FROM THE BOOK · P. 36

Consider the following and write down the terms and conditions that were violated in each instance.

- ① Think of a time when you experienced a situation with a boss that left you the most deflated emotionally.

WHAT HAPPENED

TERMS AND CONDITIONS THAT WERE VIOLATED

- ② Recall a personal situation where a simple misunderstanding dramatically impacted a relationship.

WHAT HAPPENED

TERMS AND CONDITIONS THAT WERE VIOLATED

- ③ Reflect on a situation where you were doing business with someone, and they failed to live up to your/your company's expectations.

WHAT HAPPENED

TERMS AND CONDITIONS THAT WERE VIOLATED

FOUR STEPS TO ESTABLISHING THE SECOND IMPRESSION

If your first interaction has come and gone, use this plan to get to know each member of your team. “A failure to plan is a plan to fail.”

1

PLAN THE INTRODUCTIONS

Prepare a message where you will communicate the principles and ground rules you’ll abide by as their leader.

MY PRINCIPLES AND GROUND RULES AS YOUR LEADER

MEETING GUIDELINES I’LL HAND OUT BEFORE OR DURING THE SESSION

HOW I’LL REINFORCE THESE MESSAGES DAILY DURING THE FIRST FEW WEEKS

2

MEET WITH EACH TEAM MEMBER INDIVIDUALLY

Establish the terms and conditions you want within the group. Discuss values such as respect, professionalism, and integrity.

3

WRITE DOWN ALL FEEDBACK

Review how each person thinks and feels. Use the log on the next page.

4

FOLLOW UP

The most critical step. A five- to ten-minute follow-up within a week of the session signals that the values you discussed matter.

TOOL**ONE-ON-ONE MEETING LOG**

Listen to their concerns. Write down the feedback you receive from each employee. Review with your immediate manager the areas where you feel their advice is needed.

TEAM MEMBER	DATE MET	WHAT I HEARD (CONCERNS, FEEDBACK)	FOLLOW-UP DATE	✓

Influencers on my team (meet them first): _____

A FAIR EXCHANGE

THE BIG IDEA

Employees expect a fair exchange for the work they give. When a leader favors one group over another—even without meaning to—people notice. They may not tell you, but they will go over your head, become irritable, or disengage. You have blind spots; your people see them. Establish terms and conditions around fairness, then live up to them.

EXERCISE FROM THE BOOK · P. 80

- ① In your group, identify some practices that are cultural norms, not rules or policies. Are they fair to all people within the group?

CULTURAL NORM IN MY GROUP	FAIR TO ALL?	WHO BENEFITS / WHO DOESN'T

- ② Do your employees know it is OK to bring issues to you personally that they see as unfair? If so, what terms and conditions have you established with them to ensure they do so?

- ③ Identify your biases surrounding your employees. Who are your favorites? Who are your least favorites?

MY FAVORITES, AND WHY

MY LEAST FAVORITES, AND WHY

- ④ How will you lead in a way that removes these biases? What will you change?

PERSONAL ETHICS—DO THE RIGHT THING

THE BIG IDEA

Just because it's legal doesn't make it ethical. Ethical leadership means doing the right thing even when no one is watching and even when you feel pressure not to. Your choices set the standard for your team, and the buck stops with you.

"What goes around comes around, you know."

THE AUTHOR'S GRANDFATHER

EXERCISE FROM THE BOOK · P. 99

In each case, what would ethical leadership look like?

- ① You have some employees who wear athletic shoes occasionally to work. The job requires work boots for reasons of safety, but you have let this slide. An order comes down that all employees wearing improper footwear are not to be allowed to work. A number of employees continue to come to work in athletic footwear.

- ② You get a new female employee, and male employees begin to ask her out and harass her repeatedly with comments. She just wants to do her job and fit in.

- ③ You have an employee who is fast at the job yet cuts corners to accomplish this. He is risking his safety, but this employee hates being corrected and slows his productivity when you correct him.

- ④ You get a new employee but your boss requests that you bypass the prework orientation training and start them immediately.

LISTENING—A SKILL OR A VALUE?

THE BIG IDEA

Your people bring all their beliefs, concerns, and problems to work. You don't have to agree with everything they say, but you do have an obligation as their leader to let them express their views, problems, concerns, and feelings. Listening is something you value, not only something you're good at.

EXERCISE FROM THE BOOK · P. 119

Write down your responses to these questions.

- 1 Think of a situation where an employee wanted to speak to you one-on-one and you did not give them the time.

WHAT WERE THE REASONS?

WHAT WERE THE RESULTS?

HOW WILL YOU CHANGE YOUR FUTURE APPROACH?

② When an employee indicates spontaneously in the future that they want to speak to you:

HOW WILL YOU STOP? WHAT DOES THIS IMPLY?

HOW WILL YOU PAUSE?

HOW WILL YOU DEMONSTRATE TO THE EMPLOYEE THAT YOU ARE LISTENING? WHAT ACTIONS WILL YOU TAKE?

③ What are the consequences of not listening empathetically? List some of them.

④ How is listening a value versus a skill?

STOP-PAUSE-LISTEN

When someone indicates they want to talk, say this phrase in your head.

STOP Whatever you are doing, discontinue it. No cell phone. Do not allow distractions. Focus your attention on the person and nothing else.	PAUSE Resist the natural inclination to speak. Don't make assumptions or lead the conversation. Assess their mood, tone, and the challenge they may be facing.	LISTEN Let them have the space they need to fully share their issue and feelings. Do not interrupt. Only ask questions to confirm you fully understand.
--	---	--

MY LISTENING BARRIERS: A SELF-CHECK

The book names five factors that influence how well you listen. Be honest about each one.

FACTOR	RARELY	SOMETIMES	OFTEN	WHO / WHEN?
I struggle to listen to people I don't respect as people.	☐	☐	☐	
I don't value some people's experience as much as others'.	☐	☐	☐	
I find it hard to stay open to views that differ from my own.	☐	☐	☐	
My ego gets in the way of solutions I did not create.	☐	☐	☐	
I let task-related busywork become more important than listening to an employee.	☐	☐	☐	

THE BARRIER I WILL WORK ON FIRST, AND HOW

INTEGRITY—YOUR CROWN JEWEL

THE BIG IDEA

Integrity is being honest and having strong moral principles—and more: it is the strength to keep your word, to do what you say you are going to do, and to be worthy of someone’s trust. Protect it the way the Crown Jewels are protected. When in doubt, get others in the boat with you. If there is any question, then there is no question.

“You’re looking for three things, generally, in a person: Intelligence, energy, and integrity. And if they don’t have the last one, don’t even bother with the first two.”

WARREN BUFFETT

REFLECTION WORKBOOK PROMPT

Chapter Five doesn’t end with an exercise, but it gives three scenarios where your integrity is at risk, along with responses that defend it. Read each one, then write how you would say it in your own words—so the words are ready before you need them.

- ① You are asked to do something you feel uncomfortable with.

FROM THE BOOK (P. 131): “I am not comfortable with that request.” Or ask questions: “Is that a policy? If so, may I see it? Unless it’s a written policy I am not going to do it.”

HOW I WOULD SAY IT

- ② An employee asks you to keep a policy violation to yourself.

FROM THE BOOK (P. 131): “I cannot support that request. Either you can report the violation, or I will. However, I will act on it appropriately.”

HOW I WOULD SAY IT

- ③ A piece of equipment needs service because it works inconsistently. There is a safety risk if it is used, yet it is scheduled to be used. Your manager says to use it and not to worry about it.

FROM THE BOOK (P. 131): "I am not comfortable allowing one of my people to use that piece of equipment, and I won't support its use."

HOW I WOULD SAY IT

- ④ Who would you "get in the boat with you" if your integrity were tested at work? (A mentor, your manager, HR, an employee helpline.)

- ⑤ Think of a time your integrity was tested. What did you do? What would you do now?

TRUST

THE BIG IDEA

Trust is earned through consistent good faith over time, including with the disgruntled or anti-establishment employee. As a leader you will make mistakes and may even break trust. When you do, admit your error, apologize, and make an honest, forthright effort to repair the damage. Your people will see your honesty of purpose.

“Once the people you deal with come to recognize that what you do springs from an honest heart, they will be surprisingly strong in their support of you.”

JIM CASEY, 1959

EXERCISE FROM THE BOOK · P. 145

- A** List three people you trust completely and why you trust them. What qualities do they possess? What makes these qualities important to you?

PERSON I TRUST	WHY I TRUST THEM / THEIR QUALITIES	WHY THESE QUALITIES MATTER TO ME

- B** Make a list of the top three terms and conditions needed to establish trust with you.

1. _____
2. _____
3. _____

- ③ List two people you distrust and the reasons you distrust each of them. What are commonalities between the two?

PERSON 1 AND MY REASONS

PERSON 2 AND MY REASONS

WHAT THE TWO HAVE IN COMMON

REFLECTION WORKBOOK PROMPT

Is there someone on your team whose trust you have damaged? What would an honest apology and a sincere effort to repair it look like?

PROVIDING CONSISTENT FEEDBACK

THE BIG IDEA

Everyone needs a coach. Leaders must master two types of feedback: **motivational**, which recognizes strengths and accomplishments, and **formative**, which focuses on opportunities to improve. Use the 4:1 ratio—at least four positive inputs for every one corrective input—and keep notes on your people's positive accomplishments throughout the year.

"One measure of your success will be the degree to which you build up others who work with you. While building up others, you will build up yourself."

JIM CASEY

EXERCISE FROM THE BOOK · P. 159

- A** Practice using the 4:1 ratio with friends and family. Let them know what you're doing and why. Observe how family members perform small household chores and tasks—taking out the trash, changing a lightbulb, opening a can of vegetables. As this individual performs the task, write down the positives you observe and one area where improvement may be necessary. Use motivational and formative feedback in a 4:1 fashion.

PRACTICE 1	PERSON: _____	TASK: _____
+ MOTIVATIONAL		
+ MOTIVATIONAL		
+ MOTIVATIONAL		
+ MOTIVATIONAL		
→ FORMATIVE		
HOW IT WENT		

PRACTICE 2	PERSON: _____	TASK: _____
+ MOTIVATIONAL	_____	
+ MOTIVATIONAL	_____	
+ MOTIVATIONAL	_____	
+ MOTIVATIONAL	_____	
→ FORMATIVE	_____	
HOW IT WENT	_____	

Tip from the book: begin by mastering 2:1, then 3:1, and so on.

TOOL BOOK P. 160

POSITIVE ACCOMPLISHMENTS TRACKER

It's nearly impossible to recall positive accomplishments over three, six, or twelve months. Good leaders care enough about their people's positive daily accomplishments to keep track of them. Log them here, then use them for 4:1 feedback and reviews.

DATE	EMPLOYEE	POSITIVE ACCOMPLISHMENT I OBSERVED	SHARED WITH THEM?

ABBREVIATED PERFORMANCE REVIEW

B. Complete an abbreviated performance review on a newer employee. Exercises B through E walk you through it.

EMPLOYEE _____ REVIEW DATE _____

- Ⓑ Let the employee know at least one day prior that you will be conducting a short review. Set a positive atmosphere during the notification by stating a few positives (for example, “John, you’re doing a nice job in many areas, and tomorrow, I’d like to review your progress.”).

WHAT I WILL SAY WHEN I NOTIFY THEM

- Ⓒ List all the positives that you have, including hard data and your observations. Ask the employee to share their view of their current performance. Highlight the positives they mention and the areas where they believe they can improve.

POSITIVES: HARD DATA AND MY OBSERVATIONS	THEIR VIEW: POSITIVES THEY MENTION AND AREAS THEY WANT TO IMPROVE
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

- Ⓓ Review at least four of their positives and provide correlating motivational feedback. Review only one area needing development, using formative feedback.

+ POSITIVE 1	_____
+ POSITIVE 2	_____
+ POSITIVE 3	_____
+ POSITIVE 4	_____
→ ONE AREA	_____

- ⑤ Offer your assistance to help the employee improve. Ask them what they would like from you. Write down what they say, show it to them, and then agree on the next steps.

WHAT THEY WOULD LIKE FROM ME

AGREED NEXT STEPS

OWNERSHIP AND TAKING RESPONSIBILITY

THE BIG IDEA

Ownership creates a connection between the creator and the created. Employees don't get to decide the direction or the outcome—the leader still owns the results—but when you open the door to participation, your team takes ownership too.

"People support what they help to create."

EXERCISE FROM THE BOOK · P. 171

Answer these questions.

- A** As an employee, have you ever been in a situation where changes that affected your role were made, but you weren't consulted? How did that make you feel?

- B** Think of a time when a leader you worked under solicited input from the team about changes to processes and procedures. What was the team's response?

C As a leader, has there ever been a time when you didn't ask for your team's input on something?

WHAT WAS THEIR RESPONSE?

HOW COULD YOU HAVE HANDLED THE SITUATION DIFFERENTLY?

PART TWO

**THE FINE PRINT: PUTTING VALUES-
BASED LEADERSHIP INTO PRACTICE**

BUILDING EMPLOYEES' SKILLS AND KEEPING YOUR TEAM

THE BIG IDEA

People don't quit companies; they quit people. Retention starts with how you train and how well you know your employees. If you want employees to thrive, get to know them personally—and train them right the first time, because what they learn first, they remember best and retain the longest.

TOOL BOOK P. 187

THE 7 STEPS FOR EFFECTIVE DIRECT TRAINING

Training an employee is an emotional activity, not a task. Primacy means what they learn first, they remember best and retain longest, so get it right the first time. Track each step as you train.

EMPLOYEE _____ JOB / SKILL _____

#	STEP	DONE	NOTES
1	Demonstrate each separate step of the job.	☐	
2	Have the employee describe each step you performed back to you.	☐	
3	Ask and answer questions.	☐	
4	Have the employee perform the job while you guide them.	☐	
5	Provide feedback.	☐	
6	Have the employee demonstrate what was taught, while they describe what they are doing. Repeat until they are 100 percent successful.	☐	
7	Monitor the employee while they're on the job to ensure learning is effective.	☐	

EXERCISE FROM THE BOOK · P. 192

Build a template to interview your employees for ten minutes each. Here it is, ready to use. Photocopy this page for each person on your team.

10-MINUTE EMPLOYEE INTERVIEW

COPY 1

EMPLOYEE _____ DATE _____

HOW WAS YOUR INITIAL TRAINING?

WHAT WOULD YOU IMPROVE?

FIVE MOST-IMPORTANT THINGS YOU WANT FROM
THE COMPANY

1. _____
2. _____
3. _____
4. _____
5. _____

FIVE MOST-IMPORTANT THINGS YOU WANT FROM
ME

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT ARE SOME HOBBIES OR ACTIVITIES YOU ENJOY IN YOUR FREE TIME? *(Reciprocate and share activities that you enjoy.)*

MY NOTES AND FOLLOW-UPS

10-MINUTE EMPLOYEE INTERVIEW

COPY 2

EMPLOYEE _____ DATE _____

HOW WAS YOUR INITIAL TRAINING?

WHAT WOULD YOU IMPROVE?

FIVE MOST-IMPORTANT THINGS YOU WANT FROM
THE COMPANY

1. _____
2. _____
3. _____
4. _____
5. _____

FIVE MOST-IMPORTANT THINGS YOU WANT FROM
ME

1. _____
2. _____
3. _____
4. _____
5. _____

WHAT ARE SOME HOBBIES OR ACTIVITIES YOU ENJOY IN YOUR FREE TIME? *(Reciprocate and share activities that you enjoy.)*

MY NOTES AND FOLLOW-UPS

REFLECTION WORKBOOK PROMPT

Know what you don't know, then get to know it. What parts of your team's jobs do you not yet know well enough to train someone on? How will you learn them?

Think of someone who left your team (or a team you were on). Did they quit the company, or did they quit a person? What could their leader have done differently?

DIRECTIONAL COMMUNICATION

THE BIG IDEA

Words matter. As a leader, what you say, how you say it, and when and where you say it all matter. Being uncomfortable with a type of communication guarantees you won't do it well, so identify what's holding you back and practice until it becomes comfortable.

EXERCISE FROM THE BOOK · P. 208

Now it's time to practice.

- A** Ask a work peer, friend, or family member to assist you while you film yourself giving a small presentation. Pick a familiar topic to speak about, a hobby or something you enjoy. Answer these questions while you watch the recording.

MY TOPIC _____

HELPER _____

QUESTION	YES	NO	NOTES
Am I speaking clearly?	☐	☐	
Do I use too many fillers?	☐	☐	
Do I take too long to get to my point?	☐	☐	
Is my pace appropriate?	☐	☐	
Can people follow along?	☐	☐	
Do I pause enough to let others comment?	☐	☐	

WHAT I WOULD CHANGE IN THE WAY I PRESENT

B Try filming and recording yourself in a conversation, using Teams, Google Meet, or Zoom.

QUESTION	YES	NO	NOTES
Am I missing nonverbal cues that someone is bored?	☐	☐	
...having difficulty following?	☐	☐	
...or is trying to speak but can't?	☐	☐	
Is what I'm saying accurate and truthful?	☐	☐	
Am I making a clear point?	☐	☐	

WHAT IS MY TONE LIKE?

REFLECTION WORKBOOK PROMPT

The book names two types of discussion you must be extremely comfortable with: one-on-one discussions (training, discipline, and performance) and public speaking. Identify what's holding you back.

MY COMFORT WITH ONE-ON-ONE DISCUSSIONS, AND WHY

MY COMFORT WITH PUBLIC SPEAKING, AND WHY

HOW I WILL PRACTICE, PRACTICE, AND THEN PRACTICE

THE B.E.S.T. PRINCIPLE

THE BIG IDEA

The B.E.S.T. Principle is a discussion guidepost that keeps every conversation with an employee positive, focused, and developmental: **B**e clear, **E**xpect the best, **S**tick to the objective, and **T**est commitment. It's a frame with a blank canvas—you paint the picture, and it keeps everyone on track.

EXERCISE FROM THE BOOK · P. 216

- A** Teach someone—a friend, spouse, or partner—the B.E.S.T. Principle. Build a template with the four letters and their meanings.

B

BE CLEAR

Always state the exact goal and purpose for the engagement with the employee.

E

EXPECT THE BEST

Express confidence in your employees' ability to meet the goal.

S

STICK TO THE OBJECTIVE

Do not deviate from the specific requirements needed. Keep the focus intact.

T

TEST COMMITMENT

Check for understanding, finalize, and get a verbal commitment.

WHO I TAUGHT _____

DATE _____

- B** Develop a few scenarios based on some common tasks around your home. Hold a discussion or training session with a friend, spouse, children, or partner using the B.E.S.T. Principle. Have your friend or family member critique your use of it.

MY SCENARIO (HOME TASK)	WHO I PRACTICED WITH	THEIR CRITIQUE

Use this planner before any training, recognition, or improvement discussion. The B.E.S.T. Principle should be incorporated into all the other skills-training exercises in this book.

B.E.S.T. DISCUSSION PLANNER		COPY 1
WITH _____	TOPIC _____	
B	BE CLEAR — <i>State the exact goal and purpose for the engagement.</i> 	
Confirm: can they state the purpose back to you? ☐		
E	EXPECT THE BEST — <i>Express confidence in their ability to meet the goal.</i> 	
S	STICK TO THE OBJECTIVE — <i>Don't deviate. Eliminate the sway.</i> 	
Likely "sways," and how I'll bring us back: _____		
T	TEST COMMITMENT — <i>Check for understanding, finalize, get a verbal commitment.</i> 	
Asked "So what did we do or discuss today?" ☐ Got a verbal commitment ☐		

B.E.S.T. DISCUSSION PLANNER

COPY 2

WITH _____

TOPIC _____

B

BE CLEAR — *State the exact goal and purpose for the engagement.*

Confirm: can they state the purpose back to you? ☐

E

EXPECT THE BEST — *Express confidence in their ability to meet the goal.*

S

STICK TO THE OBJECTIVE — *Don't deviate. Eliminate the sway.*

Likely "sways," and how I'll bring us back: _____

T

TEST COMMITMENT — *Check for understanding, finalize, get a verbal commitment.*

Asked "So what did we do or discuss today?" ☐ Got a verbal commitment ☐

THE 4X5 METHOD

THE BIG IDEA

For conflict resolution, the 4x5 Method gives you a map: choose one of **four viewpoints** and one of **five levels of intensity**, then use low- and high-gain questions and a well-chosen metaphor. Your intention isn't to have someone simply adopt your way of thinking—it's to help them explore and recognize a different view.

EXERCISE FROM THE BOOK · P. 243

Consider these three hypothetical examples you might encounter as a supervisor. Choose a viewpoint and a level of intensity for each, along with a metaphor. Choose someone to practice with on how you would open a discussion with an employee. Use low- and high-gain questions during the conversation. Write out the intensity level choices and viewpoints and give them to your practice partner. State the view you will take and the intensity level you will use. Video record the session using a smartphone.

FOUR VIEWPOINTS

Yours (the leader's)

"My view is..." The most preferred to avoid.

The customer's

The most important of all viewpoints. Helps the employee see the customer's relevance.

The company's

Uses the company's needs, policies, and goals.

The employee's

Do your best to see it from their side. Combined with the customer's view, it builds self-esteem.

FIVE LEVELS OF INTENSITY

1 "I would like to talk to you."

Reserved; nothing urgent.

2 "I want to talk to you."

Understand or clear up an issue.

3 "I need to talk to you."

Something important needs attention.

4 "We have to talk."

Must be corrected immediately; a repeat discussion.

5 "We must talk."

Severe; potential discipline or nonnegotiable.

Low-gain questions get one-word answers and set up the conversation. *High-gain* (open-ended) questions ask "why" or "tell me" and get the story. *Metaphors* depersonalize the issue and build a bridge between your view and theirs.

SITUATION 1

4X5 DISCUSSION PLAN

One of your employees has developed an issue coming to work late in the last month. Previously they had a spotless record. They have been late to work five times in five weeks.

VIEWPOINT ☐ Mine ☐ Customer's ☐ Company's ☐ Employee's

**INTENSITY
LEVEL** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

OPENING STATEMENT

LOW-GAIN QUESTION(S)

HIGH-GAIN FOLLOW-UP QUESTION(S)

METAPHOR

DEBRIEF WITH PARTNER: DID I SWAY THEM? WHY OR WHY NOT?

SITUATION 2

One of your employees has gone from doing his assignment at 100 percent daily down to 80 percent daily.

VIEWPOINT ☐ Mine ☐ Customer's ☐ Company's ☐ Employee's

**INTENSITY
LEVEL** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

OPENING STATEMENT

LOW-GAIN QUESTION(S)

HIGH-GAIN FOLLOW-UP QUESTION(S)

METAPHOR

DEBRIEF WITH PARTNER: DID I SWAY THEM? WHY OR WHY NOT?

SITUATION 3

4X5 DISCUSSION PLAN

One of your employees was rude to a customer. You received a complaint.

VIEWPOINT ☐ Mine ☐ Customer's ☐ Company's ☐ Employee's

**INTENSITY
LEVEL** ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

OPENING STATEMENT

LOW-GAIN QUESTION(S)

HIGH-GAIN FOLLOW-UP QUESTION(S)

METAPHOR

DEBRIEF WITH PARTNER: DID I SWAY THEM? WHY OR WHY NOT?

ESCALATION PRACTICE: THE LATE EMPLOYEE

Now approach the occurrence of the employee being late a second, third, and up to sixth time. Debrief with your partner after each discussion. Did you sway them? Why or why not?

OCCURRENCE	VIEWPOINT	LEVEL	OPENING STATEMENT	DID I SWAY THEM? WHY / WHY NOT?
2nd				
3rd				
4th				
5th				
6th				

Create a series of situations that fit your workplace and practice them regularly with a partner.

SITUATION FROM MY WORKPLACE	VIEWPOINT	LEVEL	METAPHOR	PRACTICED

DAILY MESSAGING WITH YOUR TEAM

THE BIG IDEA

Daily messages are where your team learns what matters and where you set a human, professional tone every day. Follow five steps: the attention-getter, tell them what you're going to tell them, tell them, tell them what you told them, and check for understanding. They are your team. Who should own how much they know?

EXERCISE FROM THE BOOK · P. 259

Develop an emergency plan for your family, roommates, and so forth. Use your most common potential natural disaster: a hurricane, tornado, earthquake, or severe weather. Build a three- to five-minute talk to deliver about steps to take if one of these events takes place. Be sure a colleague, family member, or friend times you. When you're finished, get their feedback on your talk. Practice until your talk is under five minutes and your audience reacts positively.

MY EMERGENCY _____ AUDIENCE _____

Draft your talk using the Daily Meeting Script on the next page, then log each practice run here.

PRACTICE LOG

Goal: under five minutes, and your audience reacts positively.

ATTEMPT	TIMED BY	TIME	THEIR FEEDBACK	UNDER 5 MIN & POSITIVE?
1				☐ Yes ☐ No
2				☐ Yes ☐ No
3				☐ Yes ☐ No
4				☐ Yes ☐ No
5				☐ Yes ☐ No

MY EMERGENCY PLAN TALK

DAILY MEETING SCRIPT

TOPIC _____

DATE _____

1

THE ATTENTION-GETTER — 30 seconds or less. A short story, or employee recognition.

2

TELL THEM WHAT YOU'RE GOING TO TELL THEM — Preview the topic and the "why."

"I am going to cover:"

- _____
- _____
- _____

3

TELL THEM — Specific, clear, concise. Use visual aids where you can.

Visual aid: _____

4

TELL THEM WHAT YOU TOLD THEM — Summarize in the same order.

5

CHECK FOR UNDERSTANDING — Ask, "What did we cover today?"

Offered one-on-one follow-up for questions ☐

Use this template for your real daily messages. Photocopy as needed.

	DAILY MESSAGE	DAILY MEETING SCRIPT
	TOPIC _____	DATE _____
1	THE ATTENTION-GETTER — <i>30 seconds or less. A short story, or employee recognition.</i> 	
2	TELL THEM WHAT YOU'RE GOING TO TELL THEM — <i>Preview the topic and the "why."</i> "I am going to cover:" • _____ • _____ • _____	
3	TELL THEM — <i>Specific, clear, concise. Use visual aids where you can.</i> Visual aid: _____	
4	TELL THEM WHAT YOU TOLD THEM — <i>Summarize in the same order.</i> 	
5	CHECK FOR UNDERSTANDING — <i>Ask, "What did we cover today?"</i> Offered one-on-one follow-up for questions ☐	

CONCLUSION

MY LEADERSHIP COMMITMENTS

You were chosen. You obviously have the talent. Leadership is a profession, and to be great you must commit to learning and growing constantly. Pull together what you've learned in this workbook.

THE VALUES I WILL LEAD BY (MY TERMS AND CONDITIONS)

THREE THINGS I WILL START DOING THIS MONTH

ONE THING I WILL STOP DOING

THE SKILL FROM THIS BOOK I WILL PRACTICE MOST

WHO I WILL ASK TO HOLD ME ACCOUNTABLE

MY 90-DAY CHECK-IN DATE

SIGNATURE

AT 90 DAYS: WHAT HAS CHANGED?
