

LEGACY LEADERSHIP COMPETENCY INVENTORY



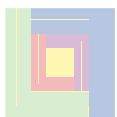
THEORETICAL BACKGROUND

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HRDQ[®]

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An excerpt from the Facilitator Guide



FACILITATOR GUIDE

Jeannine Sandstrom and Lee Smith



SECTION 1

SECTION 1: INTRODUCTION

Legacy Leadership is a comprehensive model for developing talented leaders. It covers the competencies and practices for responding to just about every opportunity and challenge today's leaders face. The model embraces both vision and accountability for results, as well as methods for creating an environment for team success, strong and dependable relationships, and for maximizing and leveraging diversity.

Authors Lee Smith and Jeannine Sandstrom developed Legacy Leadership to support their coaching practice. By looking first at who leaders are, and then at what they do, they identified behavior shifts, short-term and long-term motivators, internal attitudes, and the human dynamics that define successful leadership, and then built a template for a leader who lasts—not a sprinter who tires, but a marathon runner.

The result is a robust method—a roadmap no less—for ensuring excellence in leadership practices, one that enables leaders to live, and leave the legacy they intend. This learning system is made up of a complete framework of practices, behaviors, attitudes, and values that address every aspect of leadership. The model is not linear, and does not depend on starting at the beginning. It can be implemented at any point in the leader’s development. It is highly flexible and adaptable to just about any leadership need, in any place, at any time. And by its very nature, it builds the leaders of tomorrow.

Legacy Leadership shares some of the characteristics of the most prominent models and theories on leadership, including Leadership Practices Inventory (Kouzes and Posner), Principle-Centered Leadership (Covey), Servant Leadership (Greenleaf), and Situational Leadership (Hersey and Blanchard). This model differentiates itself from these and other models in its approach to developing leaders. The difference is in what the authors call *being* a leader. Legacy Leadership distinguishes between a leader’s role and the behaviors that support the role. By separating the role from the behaviors, trainers and coaches can shift the conversation away from what a leader does (the typical approach to development) and focus instead on the purpose of leadership (the roles or Best Practices) and the underlying actions that support the purpose of being a leader.

GETTING THE MOST OUT OF THIS WORKSHOP

This workshop is designed to introduce the concept of Legacy Leadership, as well as to help the participants interpret the results of their Legacy Leadership Competency Inventory (LLCI) feedback reports. The purpose of the LLCI is to allow the participants to rate their leadership behaviors and practices, and in the case of the 360, also see these behaviors from others’ point of view.

Using this guide, along with the feedback report, the Participant Workbook, and other supporting materials, you can conduct a series of learning activities that will enable the participants to actively learn and apply the concepts of Legacy Leadership, and create a development plan to reach their true potential as a Legacy Leader.

LEARNING OBJECTIVES

As a result of active participation in the workshop, each participant will be able to:

- ✧ Enhance his or her understanding of leadership effectiveness
- ✧ Describe the five core Best Practices of the Legacy Leadership Model
- ✧ Identify his or her strengths, trouble spots, and gaps as a leader
- ✧ Choose actions to improve his or her leadership capability
- ✧ Create a development plan to become a Legacy Leader

LEGACY LEADERSHIP MODEL

One of a leader's primary responsibilities is to set a course (the vision) and influence those he or she leads to live the vision. The best leaders, Legacy Leaders, go beyond this: they foster genuine collaboration; are powerful advocates for compassionate community over self-interest, and promote a culture of personal responsibility and accountability. And those who can successfully make the shift from *doing* leadership to *being* a leader will be the ones who inspire others to want to be around them. These leaders bring out the very best in people and create the future by developing a true leadership culture where leaders continuously develop other leaders. In other words, they become Legacy Leaders, building a multi-generational thumbprint for others who will use these same principles of learning and training with their own staff members.

Basic Assumptions of Legacy Leadership

- ✧ Legacy is created by leaders who develop leaders who develop leaders, and so on, for a multi-level maximization of leadership abilities and characteristics. The legacy resides in others rather than the leader.
- ✧ Leaders have a need for a comprehensive systemic model that serves to maximize leadership abilities throughout their careers.
- ✧ Leaders serve others first, then themselves.
- ✧ Legacy Leaders are holders of vision and values, creators of trust so that innovation and creativity can occur, influencers of inspiration and leadership, advocates for differences and community, and finally, they are calibrators of responsibility and accountability. These practices embody a simple, yet sophisticated and elegant approach to leadership.

Foundations and Theories on Which the Model is Based

Some organizations have a set of competencies with which to measure their leader performance; others do not. In either case, Legacy Leadership provides a sound structure for such competencies to reside. The structural map of the five Best Practices provides a complete picture of the direction the leadership development program will go, for the leader and for those that he or she leads.

The Legacy Leadership model is based on solid theory. Within the model there are glimpses of the following ideas and theories.

- ✧ The mindset and intention of a Legacy Leader is to serve others before self.
- ✧ The relationships between the leader and others are based on openness and trust.
- ✧ Fairness and equality exist in the leader/follower relationship.
- ✧ The approach is to create an environment in which people are motivated because they know that they are capable, and that the expectation in the work environment is to develop both success and satisfaction.
- ✧ Leaders learn to have a transformational influence that highly motivates those they lead.
- ✧ The model itself is a complete system in which each practice interfaces with other facets of the model. Using the cliché “the whole is greater than the sum of the parts,” Legacy Leadership is a very dynamic model when taken together.

SECTION 2: THE LEGACY LEADERSHIP BEST PRACTICES

Given that leadership can be complex, Legacy Leadership simplifies the role into five core competency platforms and associated critical skills for successful leadership. These platforms represent a complete set of observable and measurable behaviors. The behaviors, when used in total, are leverage points for success.



Figure 2: The Legacy Leadership Five Best Practices

Legacy Leadership is based upon five core competency platforms for successful leadership, which we call the five Best Practices (Figure 2).

1. Holder of Vision and Values—This Best Practice is about direction and commitment.
2. Creator of Collaboration and Innovation—This Best Practice is about the environment of working relationships.
3. Influencer of Inspiration and Leadership—This Best Practice is about connecting with individuals, the heart of the relationship.
4. Advocate of Differences and Community—This Best Practice is about distinction and inclusion.
5. Calibrator of Responsibility and Accountability—This Best Practice is about execution and performance.

The five Best Practices make up the context of the model. The first word of each Best Practice's title indicates the “being” part of the leadership practice. A great leader is first a holder, creator, influencer, advocator, and a calibrator. The greatness resides in who they are first, and what they do second. This is the key to understanding this leadership model, and to understanding what makes great leaders.

For each Best Practice, there are ten critical skills necessary for success. On the following pages we will discuss these competencies, as well as the organizational factors necessary for success.

Best Practice #1: Holder of Vision and Values



Best Practice #1 is about direction and commitment. The term “holder” indicates that the leader lives, or embodies, the vision and values, while measuring every action against both direction and commitment. The leader then provides consistent focus and direction.

Legacy leaders are conscious guardians of both personal and organizational vision and values. It becomes a part of who they are, and guides all they do. Being a Holder of Vision and Values implies an understanding of the necessity of never allowing organizational vision and values to slip out of focus or priority. Merely having a vision and values is not enough. They must be intentionally held, preserved, and relied upon as a guide.

Holding vision and values involves an unswerving commitment to intentional behavior that enables an organization to realize its vision and operate with integrity—consistently. These behaviors are not mere references to nonmeasurable goals or lip service to a stated code of ethics. A leader embraces and practices these skills that serve to shift entire organizational cultures to realize their goals.

The ten critical success skills that build legacy around this practice serve to shift entire organizational cultures to realize goals. They provide a solid leadership model for tomorrow’s leaders.

The 10 Critical Success Skills for this Best Practice:

1. Consistently reinforce the organization's vision and values
2. Intentionally model guiding principles in everything, with everyone
3. Personally integrate the organization's vision in all responsibilities
4. Have a well-defined strategic plan for accomplishing the vision
5. Enable the team to translate organizational vision, and align daily responsibilities with organizational goals
6. Establish measurable milestones congruent with the vision
7. Ensure that organizational values are integrated into how the organization does business
8. Clearly identify personal values; "walk the talk" in everything
9. Place importance on developing others
10. Effectively communicate and sustain processes to achieve vision and values

In addition to these critical skills, to be successful in this Best Practice, the following factors must be in place within the organization:

- A clear, compelling vision
- A values statement
- A strategic design
- A roadmap and milestones
- Communication throughout the company
- Ways to measure success



The following are potential roadblocks that the leader must overcome to achieve success in this Best Practice:

- Lack of commitment
- Missing communication
- Lack of measurements
- A focus on short-term activity instead of long-term commitment
- Lack of modeling of values by leadership

A Legacy Leader overcomes challenges, both internal and corporate, to become a holder of vision and values who sets the stage for both personal and organizational success.

Best Practice #2: Creator of Collaboration and Innovation



Best Practice #2 is about creating a positive environment for working relationships. The term “creator” indicates the leader’s ability to foster a trusting environment where collaboration and innovation can occur.

Collaboration and Innovation don’t happen by themselves. They must be encouraged and nurtured through opportunities created by leaders. This is not about being creative; it is about being a creator who creates an environment where collaboration and innovation can flourish. The leader becomes an active opportunity-seeker and possibility-thinker. This is an attitude of leadership, not just a leadership action.

The ten critical success skills that build legacy around this practice involve behaviors that mold a leader into a Legacy Leader who actively and intentionally creates opportunities to collaborate and innovate. To create collaboration within an organization, the leader ensures high levels of trust, develops processes to build and capture that collaboration, and encourages team spirit. Creating innovation relies first on the collaborative process, and then on a creative environment that allows everyone to challenge new thoughts and ideas without boundaries.

The 10 Critical Success Skills for this Best Practice:

1. Create innovative and sound possibilities for the organization
2. Foster a learning, trusting environment for true collaboration and innovation
3. Masterfully listen for what is said and what is not said
4. Be comfortable not knowing “the answers” and learn from individual perspectives
5. Draw out differing perspectives and treat disagreement as a learning opportunity
6. Ask timely, tough questions while keeping in mind the big picture
7. Set the tone for thinking beyond the present for an innovative future
8. Project how ideas will play out in the organization and marketplace
9. Discern and assist others to understand when change needs to happen and when it does not
10. Masterfully facilitate conversations where everyone contributes his or her best thinking towards a task or goal

In addition to these critical skills, to be successful in this Best Practice, the following factors must be in place within the organization:

- A creative environment
- A commitment to innovation
- Processes for collaboration
- High levels of trust
- A process for capturing outcomes



The following are potential roadblocks that the leader must overcome to achieve success in this Best Practice:

- Avoiding change
- Lack of trust
- Lack of inspiration
- Lack of methods of discovery
- Fear of creative tension

A Legacy Leader creates an environment of openness and a culture where change and diversity are encouraged and embraced.

Best Practice #3: Influencer of Inspiration and Leadership



Best Practice #3 is about making connections with individuals. The term “influencer” indicates the leader’s ability to influence and inspire, creating positive relationships.

An influencer understands that everything he or she does affects others, and therefore he or she becomes an intentional influencer. This leader makes a choice to BE an influencer in a positive way, both personally and professionally. He or she is self-inspired, and knows what inspires others. Influencing inspiration requires connecting personally with others and valuing them individually and corporately. To successfully influence leadership, this leader makes a conscious choice to be a positive presence that instills confidence, and actively seeks ways to enhance the leadership development of others.

The ten critical success skills that build legacy around this practice include behaviors that exchange organizational command-and-control for a nurturing structure and environment. These skills are active influencers in shaping tomorrow’s leaders and building corporate success.

The 10 Critical Success Skills for this Best Practice:

1. Be adept at developing and maintaining relationships
2. Use emotional intelligence and positive energy to influence others
3. Choose to model a positive perspective in all situations
4. Bring out the best in people
5. Constantly acknowledge and recognize the attributes and contributions of others
6. Intentionally delegate for the development of others
7. Lead with constant focus on showcasing others, rather than themselves
8. Have the ability and courage to take risks and inspire others to follow
9. Be able to make tough decisions with minimal negative impact
10. Lead with humility and fierce resolve to accomplish goals through others

In addition to these critical skills, to be successful in this Best Practice, the following factors must be in place within the organization:

- Positively inspired leaders
- Ability to engage others
- Personal connections
- Stories that inspire



The following are potential roadblocks that the leader must overcome to achieve success in this Best Practice:

- Focusing on numbers, not people
- Not knowing what influences others
- Fear or mistrust
- A previous history with the influencer

The Legacy Leader takes on the responsibility for moving people forward, placing importance on the growth and development of others. They intentionally influence and inspire others to greatness.

Best Practice #4: Advocate of Differences and Community



Best Practice #4 is about both acknowledging the importance and benefits of differences, and being open to diverse perspectives. The term “advocator” indicates that the leader stands in support of a course, a practice, or a person.

An advocator is someone who is courageous enough to take a stand, and stay standing. This means having a well-defined sense of right, and wrong, and the internal strength to defend it. It is an unfortunate truth in business today that we do not find too many people who are clear enough about who they are to take a firm stand regardless of the consequences.

This leader acknowledges the importance and benefit of differences, and is open to diverse perspectives. He or she works hard to remove labels and prejudices and to overcome comfort zones. Becoming a successful advocator of differences and community requires a keen desire to know others as people, not as mere resources, and to understand that when one person grows and succeeds, all do.

The ten critical success skills for this Best Practice serve to generate a team building environment that tears down personal, departmental, or organizational walls and creates a healthy culture based on understanding strengths.

The 10 Critical Success Skills for this Best Practice:

1. Be able to take a stand for a person, practice, or cause
2. Constantly raise the visibility of individuals by mentoring and developing them
3. Advocate for a strengths-based culture
4. Be a connoisseur of talent, recognizing, valuing, and utilizing the best each person has to offer
5. Insist on building teams with diverse approaches and capabilities
6. Look for and create cross-functional opportunities to develop unique talent
7. Promote inter-departmental collaboration, rather than “silo” orientation
8. Consider the impact of actions on the greater community beyond the organization
9. Maintain ongoing dialogue and involvement with internal and external communities
10. Promote an inclusive environment to unite toward a common focus

In addition to these critical skills, to be successful in this Best Practice, the following factors must be in place within the organization:

- Processes for identifying strengths
- Comfort with differing perspectives
- Practice inclusion, not exclusion



The following are potential roadblocks that the leader must overcome to achieve success in this Best Practice:

- Rigid belief systems and biases
- Stereotyping
- “Rubber stamp” mentality
- Avoidance of vulnerability
- “Us against them” thinking

The Legacy Leader brings all the parts together to create a whole. An inclusive environment is created where trust, respect, and discovery thrive.

Best Practice #5: Calibrator of Responsibility and Accountability



Best Practice #5 is about execution and performance measured against vision and values. The term “calibrator” indicates constant vigilance of progress toward accomplishing responsibilities and accountabilities, making adjustments as necessary.

A calibrator is one who is clear about standards, visions, values, and what is right or wrong, both personally and organizationally, measuring all behaviors against these beliefs. This is an ongoing internal process that never ends. It is a natural, conscious, and continual setting of the “mark” and adjusting what is necessary to consistently hit it. A calibrator is a human thermostat, always measuring the environment and adjusting as necessary. Being a calibrator means being vigilant, accountable, responsible, thoughtful, and flexible, with a constant eye on the target.

This leader consistently compares results against vision and values and shows where learning and new behaviors need to be developed. This kind of calibration of responsibility and accountability is not about discipline, punishment, or pointing fingers. It is a standard set by leadership by which the whole community has ownership of the process—and therefore that community is wholly accountable for progress made during that process.

The ten critical success skills for this Best Practice set the standard by which the whole community has ownership of the process—and therefore the whole community is wholly accountable for progress made during that process.

The 10 Critical Success Skills for this Best Practice:

1. Execute a strategic plan, using appropriate checks and balances to reach goals
2. Have a “finger on the pulse” of the organization, and be aware of the status of milestones
3. Ensure that team members are clear about their positions and responsibilities and how they fit into the organization’s direction and deliverables
4. Require peak performance from all and support them with the appropriate resources
5. Provide regular feedback and coaching, taking action with low performance
6. Have clearly defined personal and organizational accountabilities
7. Have a clearly developed action plan with benchmarks, milestones, and provisions for adjustments
8. Model a sense of urgency for accomplishment and response to change
9. Be alert to trends which may affect results; recalibrate where necessary
10. Gain commitment from the team with established accountabilities, and appropriate consequences and rewards

In addition to these critical skills, to be successful in this Best Practice, the following factors must be in place within the organization:

- Calibration processes vs. discipline
- Measurements and rewards
- Measurements against roadmaps and milestones



The following are potential roadblocks that the leader must overcome to achieve success in this Best Practice:

- Leader not holding self or others accountable
- Either/or thinking
- Lack of respect for others
- Exclusion of the customer in the measurement mix

The Legacy Leader focuses on guidance, direction, careful correction, consistent growth, and the celebration of success. The process is most important, with the leader making sure that the aim is precise so that the arrow hits the mark.