



MGMT 671 Syllabus and User's Guide Spring 2008

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Overview

It's a new era for leadership in business. Emerging economic, social, and cultural pressures demand that business leaders, at all levels in an organization, find better ways to align their leadership vision, core values, and everyday actions to produce needed, valued results at work as well as at home, in the community, and for the self.

Most approaches to learning business leadership focus on performance and results. In this course the focus is on growing your capacity as a "total leader." We start with you, the developing leader, as a whole person. The challenge is to use leadership skills to leverage synergies across the domains of life — traditionally seen as conflicting — which can, with a shift in mindset about the meaning of work and the development of new skills, become allies in producing results that matter.

Now more than ever leadership is not just about work, it's about life, and that success in the new world of business requires us to see leadership and life as pieces of the same puzzle. Total Leadership is a proven method for how to integrate work, home, community, and self – and to improve performance in all parts of life. This results from the powerful combination of increased authenticity (being real), integrity (being whole), and creativity (being innovative).

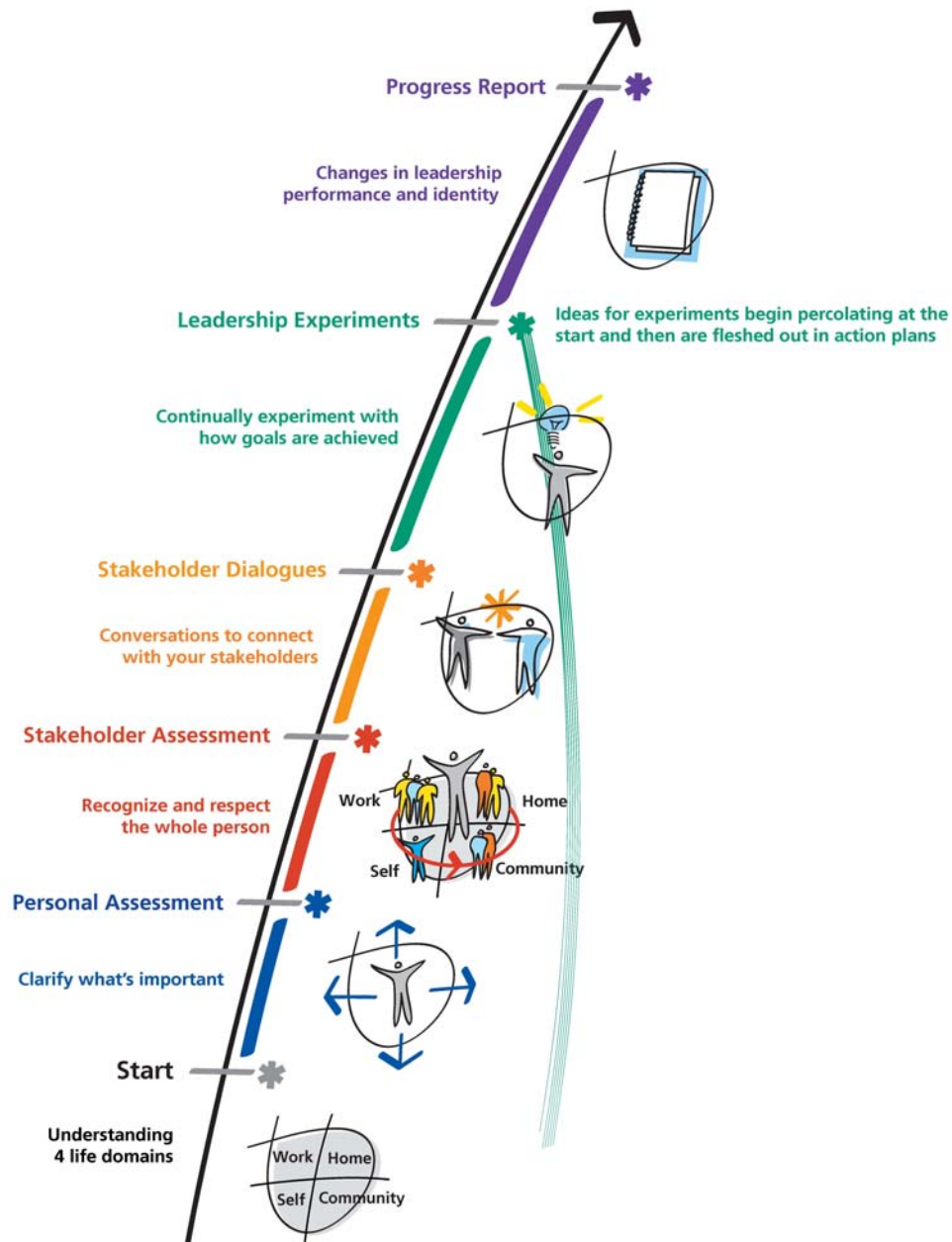
The primary goal is for you to learn more about what it takes to be an effective leader – no matter what your position or role in an organization -- and to make real progress towards becoming one through your work on Total Leadership experiments.

In this course you have the opportunity to learn the key principles of Total Leadership, how to apply them to your own leadership challenges, and how to teach others to do the same. You are the "live case." This involves learning about your self and creating change in your world. This requires serious and deep introspection; intensive dialogues about what really matters, performance expectations, and how things get done with key stakeholders in all domains; and creative action intended to produce better results at work, at home, and in the community and for your self.

You work closely with your classmates to create an interactive community in which you learn and are enriched by their experiences. Students say that the open environment in this course was the best they'd experienced and it was the key factor in bringing value to their learning agenda. The instructor facilitates discussion and students need to come prepared to highlight what from the readings is most beneficial and important to them.

Our main focus is on creative experiments designed to leverage synergies across domains. We use a variety of methods to support this learning from action; peer coaching, readings, class dialogues, and written assignments. We explore key principles and skills then apply them to meet your leadership challenges. Intensive assessments and analyses lead to self-designed initiatives to improve performance in all life domains. Reflection on data gathered from these experiments results in new knowledge about how to lead with greater authenticity, integrity and creativity.

Be a better leader, have a richer life.



Notes on the Total Leadership Experience

Start

- Read background materials to understand Total Leadership principles and skills.
- Get familiar with this guide to understand course requirements.
- Begin to discuss application of principles to your life.

Assessments and Coaching Network

- Complete assessments and get feedback on them from coaches.
- Prepare for dialogues with key stakeholders.
- Conduct stakeholder dialogues.
- Discuss results of stakeholder dialogues and initial ideas for your action plan.

Self-Designed Leadership Experiments

- Refine ideas for your experiments and develop action plans.
- Get feedback from peer coaches on your experiments.
- Plan for ongoing support with experiments.
 - Conduct action plan and track progress with metrics.
 - Ongoing coaching with peers, faculty, others.

Progress Report: Changes in Leadership Performance and Identity

- Review progress on changes in performance, satisfaction, and alignment.
- Articulate lessons learned about leadership and what it means to you.
- Develop ideas for ongoing collaboration, coaching of future participants.

Total Leadership Principles and Skills

Be Real: Clarify What's Important. Effective leaders define and articulate a vision that embraces the diverse values and lifestyles of all employees. Their everyday actions fit with not only their personal values but also with the core values of the business. Through continual observation and reflection they know their priorities, their strengths and weaknesses. They strive to increase commitment to shared goals through genuine dialogue with key stakeholders, telling their own story to the people about whom they care most, in all life domains. And they hold themselves and others accountable for pursuing valued goals. People seeking to embody this principle demonstrate these skills:

- C1. align actions with core values by choosing what matters most
- C2. cultivate awareness of true leadership priorities in all domains
- C3. genuinely convey own leadership story – past, present, and future
- C4. passionately articulate clear leadership vision
- C5. pursue accountability for meeting valued goals with metrics

Be Whole: Respect the Whole Person. Leaders take responsibility for respecting the value of all aspects of their lives; at work, at home, in the community, and in them selves (their health, spiritual growth, and leisure). They align the interests of different stakeholders in gaining support for collective goals as well as set, maintain, and respect the boundaries that enable value to be created at work and in other aspects of their lives. They invest in social capital to nurture networks and partnerships that provide the support needed for achieving results that matter. People seeking to embody the second principle demonstrate these skills:

- R1. build networks of trust by caring about and contributing to others
- R2. communicate to clarify and negotiate expectations
- R3. ethically influence others to generate support in all domains
- R4. transfer assets and skills across domains
- R5. manage boundaries and smooth transitions between domains

Be Innovative: Experiment with How Things Get Done. Leaders continually re-think the means by which goals are achieved in ways that force a results-driven focus and provide maximum flexibility with choice in how, when, and where things get done. They have the courage and openness to experiment with new work methods and tools communications tools to better meet performance expectations. They reduce reliance on traditional methods, such as face time and co-location of resources, while using them more wisely to build trust when needed and, at the same time, taking advantage of the flexibility and control afforded by virtual media. Those aiming to embody this principle demonstrate these skills:

- E1. question assumptions about current methods, especially those requiring tradeoffs
- E2. encourage flexibility in means while focusing on results
- E3. courageously embrace change
- E4. foster a learning environment through smart trial-and-error
- E5. seek cross-domain synergies in win-win solutions to conflict

Commitment and Consent to Participate In Research

Commitment

The role of the instructor is to create the structured set of activities for undertaking total leadership experiments and a forum in which you are encouraged to grapple with relevant ideas and experiences in a systematic manner. For you to gain the benefits this course is designed to produce, it's essential that you participate actively in advancing course goals.

There are three primary concerns of all new students to this course. First, some participants enter this course with skepticism. They fear that the concepts and tools won't work in their lives and organizations because of entrenched mindsets that are antagonistic to innovation and to the idea that there are synergies among life's domains that can be leveraged to achieve better results in all of them. You will quickly learn, through direct contact and active interaction with your peers, that there are numerous creative solutions available to you.

Second, some are concerned about the workload. **There will be frequent deliverables for this course.** Please review the section below that has estimates for the time commitment required for each assignment. The workload has not been a significant obstacle for students who have completed the course in the past since the work builds upon itself and requires more qualitative assessments rather than qualitative skills.

Third, some worry about undertaking deep analysis of their lives and talking about what really matters with people about whom they care most. It has been shown that with real commitment to investing in experimentation and wrestling with the leadership challenge of initiating innovation, most participants work through their fears and doubts and thus achieve greater leadership capacity and better results.

That said, you are strongly encouraged to decide, at the outset (admittedly with limited information), whether or not you are willing to make a commitment to this course, and to drop it if your doubts or concerns seem substantial. This course is a kind of innovation in leadership education. And it's optional. Sign up only if you are seriously interested, and don't if for any reason it doesn't fit with your own plans and needs. Generally speaking, it's not useful for the instructor to have to spend time convincing skeptics and working to overcome major doubts when there are those who are on board and willing to proceed.

Consent to Participate in Research on Total Leadership**Agreement to participate:**

As a student in this course on Total Leadership, you are contributing to research and future knowledge on this topic. All information you provide will remain anonymous unless you explicitly allow the use of identifying information. Given this commitment to anonymity unless otherwise indicated, by participating in this course you agree to allow Prof. Friedman to quote or paraphrase your assessments, action plan, and updates in books, articles, presentations, and research papers. This is your choice since you are not required to take this course. Nonetheless you may withdraw at any time.

Purposes and scope:

By participating in this course and in the research on Total Leadership you are granting Prof. Friedman the privilege of using information you provide in the deliverables for this course for purposes of (a) refining the Total Leadership program and (b) gathering data for articles, books, coaching tools, reports, etc. These deliverables include information about your work/school, home, community and self; change initiatives based on your assessments and action plans; peer feedback; and lessons learned from your experiments.

Confidentiality:

All information used in the research will be treated confidentially. No references to identifying information will be included except for basic demographics (e.g., age, gender, industry) so that your identity, and the identities of your stakeholders and of organizations with which you are affiliated, will remain anonymous. No names will be made public without your consent. Should any concerns arise, contact Prof. Friedman at any time.

Benefits:

It is expected that by participating in this course you develop a better understanding of leadership and how to integrate the different parts of your life in order to perform better in all domains. You will be invited to make use of the tools and information that will be available when the online version of total leadership is launched. You are not financially compensated as a participant in the research. You get course credit and a grade based on the quality of your work on the assignments and on your class contributions.

Materials and Grading

Materials

The majority of the required readings for the course are in the course pack, including pre-publication draft chapters of Friedman's forthcoming book, *Total Leadership: be a better leader, have a richer life* (Harvard Business School Press, 2008), all of which will be posted on webCafe. Students are permitted to print one copy for their own use only. Recommended is the book by Friedman, S. D. and Greenhaus, J. H., *Work and family – allies or enemies?* (Oxford University Press, 2000). Other readings may be posted on webCafe during the course, depending on student interest, and some additional exercises may be assigned. *It is expected that you will complete the readings and be ready to apply them in class sessions and deliverables.*

Grading

Course grade is determined by the total of your scores on the following:

<u>Activity</u>	<u>Max.</u>
Class Contribution	50
Deliverables	110
Progress Report	<u>40</u>
Total	200

The point system that will be used on assignments is designed to provide a simple process for tracking progress, giving feedback, and identifying exemplary work. Criteria:

- ❑ Attempted assignment but contents are incomplete, insufficient, or do not display understanding of key principles. Additional work must be done to complete assignment and/or demonstrate grasp before moving ahead.
- ❑ Completed assignment. Demonstrates understanding of key principles. Ideas presented are relevant. No further work necessary.
- ❑ Exemplary assignment. Excels at grasping key principles. Clear, concise, and directly addresses all key issues. Serves as role model for others in class.

To pass the course you must complete all deliverables. You have the opportunity to earn high grades by performing in ways distinguish you from your peers.

Course Contribution

Your contribution grade is based on quantity and quality of what you bring to our work. The instructor assigns the grade and it is informed by peer evaluation. What counts:

- ❑ In class sessions
 - Showing up – attendance will be taken.
 - Being prepared to analyze and discuss readings in class. Come with notes on questions about the readings and their relevance for both your project and your goals for the course.
 - Presenting your ideas in a way that others can understand.
 - Asking thoughtful questions.
- ❑ Quality of feedback to peers.
- ❑ Usefulness of contributions to online discussions and other online activity
- ❑ Any other initiatives you take to advance course goals.

Posting Your Deliverables and Commenting on Others'

- ❑ Submit all deliverables on webCafe in your personal folder.
- ❑ For all deliverables, post 1 copy in your personal folder (unless otherwise noted) in the following format: **yourlastname – deliverablenumber.doc**
- ❑ The instructor and two peers will read and evaluate this document. All edited documents are to be saved back to the author's folder in a new file that has the reviewer's initials added to the filename. Example: **yourlastname – deliverablenumber – sdf.doc** will be posted for those the instructor reviews.
- ❑ Blank copies of the forms for deliverables are saved in templates in webCafe. Use these to produce your deliverables. For your reference the forms are here, too.

Deadlines and Missed Class Sessions

- ❑ Required preparation includes readings. It is assumed that you have read the readings and are prepared to discuss them when you arrive at the class session.
- ❑ Because of interdependencies among participants built into this course, missed deadlines create problems for others. If you are going to miss a session, or if you think you might miss a deadline for a deliverable, notify Prof. Friedman and the affected parties (clients and coaches) prior to the deadline to work out any needed adjustments. For fairness' sake, points will be deducted for lateness.
- ❑ Missing a deadline without prior notice puts you at risk for failing the course.
- ❑ For a session you must miss, it's recommended that you interview 1 or 2 classmates about that session and then send a note to Prof. Friedman, preferably within 3 days of the session, so he can follow-up with you to help you stay on track.

Schedule of Deliverables

Please be specific when answering questions and completing deliverables. The more you are able to detail your thoughts, the better positioned your peers will be to help provide constructive feedback. Samples of key deliverables are available on webCafe.

Deliverables will be discussed in our class sessions (also listed below, *in italics*). In addition, reading and commenting on others' deliverables on webCafe is strongly encouraged. This course is designed to be a learning community that is an open environment among members, and so is the course's webCafe. Experience shows that the more you learn about, and contribute to, others the more you learn about yourself.

Due	Deliverable	Description
1/17	D1	Be Real: Personal Assessment (15 pts)
1/22	D2	Peer Feedback on D1 (5)
1/24	D2.1	Alumni Coach Meeting (no grade)
1/29	D3	Be Whole: Stakeholder Assessment (15)
1/31	D4	Peer Feedback on D3 (5)
2/19	D5	Note on Stakeholder Dialogues (15)
2/26	D6	Be Innovative: Game Plans and Scorecards for Experiments (20)
2/28	D7	Peer Feedback on D6 (5)
3/18	D8	Note on Stakeholder Reactions to Experiments (5)
3/25	D9	Alumni Interview (5)
4/15	D10	Leadership Biography (15)
4/24	D11	Written Feedback for Classmates (5)
4/29	D12	Progress Report on Experiments (40)

About Total Leadership Assessments

Taking action on your experiment – the core of our course -- has two main aspects. First, complete your assessments to measure your baseline situation, generate insights, and develop ideas for meaningful, innovative action. Second, apply TL skills in implementing your action plan, which is created after you complete your assessments.

The assessments are designed to help you understand the TL model and how to use your experiment to learn how to achieve four-way wins; to take meaningful steps towards becoming a better leader, having a richer life. Each of the assessments gives you a different perspective on how the TL principles apply to you. They are intended to help you design experiments in how work gets done; to accomplish valued goals more effectively and learn new ways of aligning your actions and values in everyday life.

The assessments highlight the first two principles: be real and be whole. They provide a disciplined approach to building a systems view of the domains in your life. Your experiments create opportunities for you to practice the third principle – be innovative – and the skills associated with it.

Everyone has their own comfort level about how much they wish to disclose about the various domains of their lives. There is no intent in these exercises to intrude into your privacy. If the exercises feel intrusive, please discuss your concerns with Prof. Friedman.

These exercises are to be completed in sequence because they are organized using a systematic approach and set of principles. As you learn more, it is expected that you will want to review and refine your assessments and action plans. It is useful to take your time and to be thoughtful about your responses on the assessments because they influence your subsequent dialogues with stakeholders and actions you take in your experiments.

Taken together, these assessments will assist you in identifying the issues in your life that can be addressed by your experiment. After you complete the assessments, then you will develop your initial ideas for your experiments. To reiterate: It's expected that the design of your experiment will be modified in light of feedback and other new information.

And, again, it is expected that, by the end of your experiment, you will learn more about achieving both greater compatibility among the domains and greater satisfaction of stakeholder expectations. In other words, your assessments will look different than they did at the start, indicating personal change and lessons learned about leadership.

The assessments track performance, satisfaction, and alignment (PS&A) at the beginning and at the end of our course. This allows for an examination of three kinds of changes that result from your experiments. The standard assessments (done by all participants) are described below and detailed in the pages that follow. As described later, you will also design customized metrics to monitor action and assess results of your experiments.

Performance. The two standard performance assessments focus on your ability to demonstrate the Total Leadership skills and how well you meet the performance expectations of key stakeholders in your life:

1. Total Leadership Skills Assessment (D1 and D12)
 - Be Real: Clarify What's Important (C)
 - Be Whole: Respect the Whole Person (R)
 - Be Innovative: Experiment with How Things Get Done (E)
2. Stakeholder Assessment (D3 and D12)

Satisfaction. In D1 and again in D12 you assess your satisfaction with each of the four domains and with your life as a whole.

Alignment. Alignment refers to how well the four different domains of your life complement and enhance one another, rather than compete with one another; how compatible they are. The two standard assessments of alignment are:

1. The Four-Way View on What's Important (D1 and D12)
2. The Four Circles (D1 and D12)

1/17 -- Deliverable 1
Be Real: Personal Assessment
(Time Commitment: High – 15 Points)

This deliverable must be completed by class time on 1/17 to participate in the course.

First, read Friedman's book through Chapter 3 and a few of the stories in *Changes in leadership performance and identity*. Then, open the MSWord document "TL Deliverable 1 template.doc" and save it as a new file with the filename = **yourlastname – D1.doc**. Respond to all of the questions in the document, which appears in full, below, for your reference. Other participants will have access to this document throughout the course as a reference point. Below each item please provide the requested information.

In this first deliverable – on being real and clarifying what's important -- you provide information on your personal leadership vision, your values about what is important in your life, the amount of time and energy you are currently devoting to each domain, your satisfaction with each domain, and your Total Leadership skills.

- D1.1.1 Full name and, in parenthesis, name you would like to be called.
- D1.1.2 Birth date (MM/DD/YY):
- D1.1.3 Family structure (married, single, etc.):
- D1.1.4 Children (number and ages – write "0" if none):
- D1.1.5 Current employment (position, company, and industry):
- D1.1.6 Wharton degree and expected date:
- D1.2.1 Permanent personal e-mail:
- D1.2.2 Wharton lifetime email:
- D1.2.3 IM and Skype names (if available):
- D1.2.4 Phone number:
- D1.3 What are your goals for this course? What motivated you to sign up?
- D1.4 Please list all of the organizations or associations of which you are an active member. This information will help identify common interests in our learning community and it will be used in thinking through your "community" domain.
- D1.5 Describe someone you admire, a hero. What about them is admirable? (1 para.)
- D1.6 List the 4 or 5 key events in your life. In a sentence or two, describe the impact each event had on your values and direction.
- D1.7 What should your peers and instructor know about you to that will help us motivate you throughout the course?
- D1.8 Total Leadership Skills Assessment. Complete this confidential survey at: psychology.msu.edu/totalleadership. Enter the access ID: totalleadership. (There is no www in the URL.)
- D1.9 Review the Total Leadership Principles and Skills (see p. 5 of this syllabus). Identify 2 or 3 skills (C. 1, C.2...E.5) you would most like feedback on throughout this course. Explain.

D1.10 Your Personal Leadership Vision

Describe the kind of leader you want to become, including the most important goals you have for the contributions you want to make to the world – your legacy -- by writing a short history of your future (your life and career) between now and 2020. What will you be doing in 2020 and what impact will you be having? This statement of your personal leadership vision is intended to provide a focus for your long-term and short-term actions and it's expected that you will revise it over time. It will be of most use if your vision is a *compelling image of an achievable future*, a story or picture that inspires. (1 page max.)

D1.11 Your Core Values

Every organization has its own set of values. This assignment asks instead about your personal values. Please describe the core beliefs, values, and ideas that are most important to you as a leader and as a person (see Friedman Chapter 2). Explain why these beliefs, values and ideas are important to you. (1 page max.)

D1.12 The Four-Way View on What's Important in Your Life

Complete the chart below. In the first column, distribute the percentages (100% divided across the four domains) based on how important you think each area of your life is, at this point in your life (it is understood that these percentages vary over time). In the second column, distribute the percentages to indicate how much time and energy you actually spend in each area. In the third column, indicate how satisfied you are presently with how things are going in each domain by circling or bolding a number from 1 to 10, where "1" = "not at all satisfied" and "10" = "fully satisfied." Finally, in the bottom right cell, circle/bold the number that best represents how satisfied you are with life in general.

	Importance (in %)	Focus of Time and Energy (in %)	Satisfaction (1=not at all ; 10=fully satisfied)
Work / Career / School	%	%	1 2 3 4 5 6 7 8 9 10
Home / Family	%	%	1 2 3 4 5 6 7 8 9 10
Community / Society	%	%	1 2 3 4 5 6 7 8 9 10
Self : mind, body, spirit	%	%	1 2 3 4 5 6 7 8 9 10
	100 %	100%	
Life as a whole			1 2 3 4 5 6 7 8 9 10

After you've completed the above chart and your personal leadership vision and values, write brief notes (about 1-2 paragraphs each) in response to the following questions:

D1.13 How aligned are your values and your actions?

D1.14 What can you do to better align them?

D1.15 What are the consequences of the current choices you make about time/energy spent at work, at home, in the community, and for yourself?

D1.16 The Four Circles

The Four Circles exercise provides the first of two targets or goals for all experiments in our course. The Four Circles show the extent to which the four domains of your life are either compatible or in conflict. To complete this assessment, please do the following:

- ❑ Draw four circles on a piece of paper, each representing one of the four domains. The overlap of the circles represents your best estimate of the extent to which the domains are compatible, or in harmony, with respect to the values, interests, and goals you pursue in each domain. Complete compatibility between any two domains would be represented by complete overlap of the two representative circles. Complete incompatibility, or conflict, between any two domains would be shown by representative circles that have no overlap at all.
- ❑ The size of each circle should correspond to the percentage you assigned to it in the first column of D1.12 (The Four-Way View on What's Important). If, for example, "Work" was 30% and "Home" was 40% then the "Home" circle would be slightly bigger than the "Work" circle.
- ❑ Write the name of each domain in or around the appropriate circle.

After you have drawn your four circles, please type below your brief notes (about 1-2 paragraphs) in response to the following questions:

D1.17 The goal is to create better alignment or compatibility among your four domains. What would have to be done for you to have a domain map consisting of four completely overlapping circles? (Keep in mind that very few people have completely overlapping circles; this is a target to aim for.)

D1.18 What specific ideas do you have for what you might do to experiment with how you pursue important goals in order to achieve greater compatibility and reduced conflict among domains?

Class Sessions 1/17, 22, and 24
Be Real: Act with Authenticity by Clarifying What's Important

Goals

- Overview course goals
- Establish performance expectations
- Learn about previous participants' experiences
- Establish peer coach teams: goals, membership, operating values
- Understand the basic principles and methods of Total Leadership course
- Realize the value of leadership vision and values in driving performance
- Articulate your personal leadership vision and values
- Increase understanding of first set of assessments and how to use them
- Discuss how to achieve authenticity by aligning values and actions

Readings

- Friedman, S. D. 2008 (pre-publication draft). *Total Leadership: be a better leader, have a richer life*. Front Matter, Preface, and Chapters 1, 2, and 3.
- Friedman, S. D. 2005. *Changes in leadership performance and identity*.

Background Reading

- Friedman, S. D., Christensen, P. & DeGroot, J. 1998. Work and life: the end of the zero-sum game. *Harvard Business Review*, Nov-Dec, 119-129.

1/22 -- Deliverable 2
Peer Feedback on D1 – Clarify What's Important
(Time Commitment: Medium – 5 Points)

Read

- Friedman, S. D. 2005. *Total Leadership coach's guide*.
- Friedman, S. D. 2005. *Notes on Deliverable 1: Personal Assessment*.

Action

Provide constructive feedback to your client and another class participant (peer, to be determined) on D1. Open and save a copy, adding your initials to the end of the file name. Using 'Track Changes' in 'Tools' write your comments and save this new copy with your initials following the file name. Post it to your subject's personal folder.

Constructive feedback should not be thought of as "having all the right answers". Instead, provoke your client to examine the issues further by asking the right questions of his/her work.

- ☐ What points have been left unanswered?
- ☐ Where does he/she need to be more specific?
- ☐ What is another approach for tackling the issue?

Include comments in the text throughout the paper.

Conclude with a paragraph that includes your observations in summary on both strengths and areas for improvement. Add any suggestions and ideas that you believe will be useful. Write your name at the end of your summary comment.

Participants are sometimes unsure how much is too much or too little when it comes to commenting on another participant's work. There are no hard and fast rules for the amount of feedback you should provide. However, remember that this person is working with you to develop new tools and ideas for Total Leadership. You are encouraged to comment as frequently as possible to provide the richest opportunities for insight by your peers.

**1/24 – Deliverable 2.1
Alumni Coach Meeting
(Time Commitment: Low – No Grade)**

Read

- D2s written by your coaches on your D1
- Read your Alumni Coach's biography and Progress Report/Final Paper

Actions

- Send your resume to your Alumni Coach, for background
- 1-to-1 conversation with your Alumni Coach
 - What did you learn from the feedback received on D1?
 - How should you revise D1 based on feedback received?
 - Is the vision a compelling image of an achievable future?
 - Does this vision truly inspire?
 - Set expectations for how you will work with your Alumni Coach

**Class Session 1/24
Alumni Perspectives**

The plan for this class is to have people who have taken our course talk about their experiences and lessons learned from their experiments.

Goals

- Learn about previous participants' experiences
- Further clarify expectations

Background Reading

- Friedman, S. D., 2005. *Total Leadership: media coverage*. Compilation of articles.

1/29 -- Deliverable 3
Be Whole: Stakeholder Assessment
(Time Commitment: High – 15 Points)

The second set of assessments – about being whole and the most important people in all parts of your life – begins by asking you to describe what your key stakeholders expect from you, what you need from them, and how you use different forms of communication with them. Read Friedman Chapter 4 before starting your D3.

D3.1 What do your key stakeholders expect from you?

This assessment is focused on helping you understand the performance expectations that your stakeholders have of you. Knowing the expectations that your stakeholders have of you will help you understand what is important to them, as well as how to increase business results and enrich lives. Using the chart below, in the first three columns identify the most important three or four people in each domain and write their initials after the stakeholder designation (W1, W2, etc.) in the upper left corner of each cell. Keep the box in the upper right blank for now. If you wish, you may cluster stakeholders in similar roles with similar expectations. So, for example, W4 might represent all of your immediate work colleagues, taken as a group.

Please give a 1-sentence description of who each stakeholder is in relation to you:

W1:
W2:
W3:
W4:
H1:
H2:
H3:
H4:
C1:
C2:
C3:
C4:

For each stakeholder (or cluster of stakeholders), identify the main things (1 to 3) they expect of you in performing your role. In the “Self” column, identify the four primary performance expectations you have for yourself in terms of spirituality, relaxation, and emotional and physical health.

Some tips on writing expectations:

- ☐ Try to put yourself in the mind of your stakeholder.
- ☐ Imagine him or her responding to the question: What are the main things you want or need from me?
- ☐ Describe the behaviors he or she expects.
- ☐ Be as concrete and specific as you can.

Performance Expectations of Key Stakeholders

	Work	Home	Community	Self
Initials and Performance Expectations	W1:	H1:	C1:	Spirituality
	W2:	H2:	C2:	Relaxation
	W3:	H3:	C3:	Physical health
	W4:	H4:	C4:	Emotional health

After you've completed the above chart, write your responses to these questions (about 1-2 paragraphs for each question):

- D3.2 What are the main things my stakeholders really want from me? Don't limit your response to the need for your time and attention, important as that might be.
- D3.3 How are these expectations compatible with each other?
- D3.4 Where do they conflict?
- D3.5 Do their expectations fit with my leadership vision and values? What are the implications of your assessment of this fit?

D3.6 What Do You Need From Your Key Stakeholders?

This assessment is aimed at helping you articulate what you expect and need from your key stakeholders. This will help you understand what is important to you and how to better meet expectations in all domains. Use the same stakeholders in this analysis as you did for D3.1 (but don't repeat the "Self" expectations). Enter their initials in the appropriate cells of the chart below. Keep the box in the upper right blank for now. For each stakeholder, identify what you need from him or her to support you in aligning your values and actions and in achieving your goals. Refer to guidelines above on writing expectations.

Support Needed From Key Stakeholders

	Work	Home	Community
Initials and Performance Expectations	W1: <div></div>	H1: <div></div>	C1: <div></div>
	W2: <div></div>	H2: <div></div>	C2: <div></div>
	W3: <div></div>	H3: <div></div>	C3: <div></div>
	W4: <div></div>	H4: <div></div>	C4: <div></div>

After completing the above chart, respond in 1-2 paragraphs each to these 3 questions:

D3.7 What are the main things you really want and need from your key stakeholders?
Please don't limit your response to the need for their time and attention.

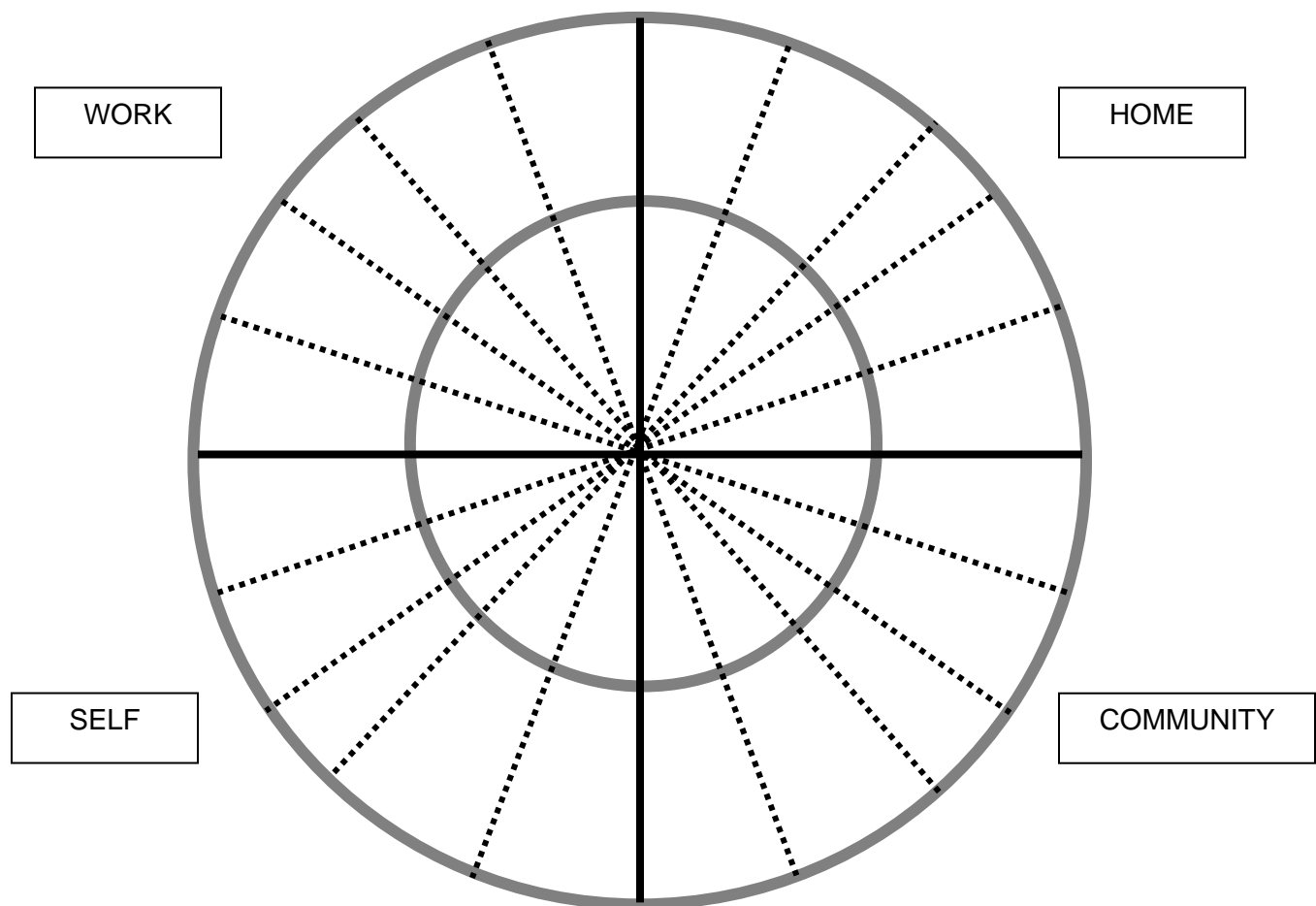
D3.8 How compatible are my expectations for them with what they expect of me?

D3.9 How do my expectations for them fit with my leadership vision and values?

D3.10 Stakeholder Map

The Stakeholder Map shows the extent to which stakeholder expectations in the four domains are currently being met and where are the best opportunities for creating change with your experiment. The purpose of this next step is to provide a picture (using pen, pencil, or marker) of how well expectations (your stakeholders' and your own) are being met and to identify the best opportunities for leverage across domains and performance improvement. Following the Four Circles, the Stakeholder Map is the second of the two main targets or metrics for experiments.

- ❑ Go back to D3.1 and enter a rating from 1-10 in the box in the upper right hand corner of each cell of the matrix indicating the degree to which you believe you are meeting that stakeholders' expectations. A "10" would indicate that you believe you are meeting their expectations fully all of the time. A "5" would indicate that you believe you are meeting their expectations some of the time. A "1" would indicate that you believe you are never meeting their expectations.
- ❑ Starting with your Work stakeholders, draw a line for each stakeholder in the Work quadrant of the diagram on the following page. Start from the center-point of the diagram and extend the line towards the perimeter so that the length of the line corresponds to the rating you gave for how well you're doing in meeting this stakeholder's expectations. A "10" would be a line from the center-point of the circle all the way to the first circle (the smaller one, not the outer circle); a "5" would be a line from the center-point half way to the first circle. Draw lines for each stakeholder in the same way until you've drawn lines for all stakeholders.
- ❑ Now go back to D3.6 and enter a rating from 1-10 in the box in the upper right hand corner of each cell of the matrix indicating the degree to which you believe this stakeholder is meeting your expectations. Again, a "10" would indicate "all the time", a "5" would indicate "sometimes", and a "1" would indicate "never".
- ❑ Starting with your Work stakeholders, draw a line for each stakeholder in the Work quadrant of the diagram on the following page, starting from the outer circle of the diagram and extending to the inner (smaller) circle so that the length of the line corresponds to the rating you gave for how well this stakeholder is doing in meeting your expectations. A "10" would be a line from the outer circle all the way to the first circle (not to the center-point of the diagram); a "5" would be a line from the outer circle half way to the first circle. Draw lines for each stakeholder in the same way until you've drawn lines for all stakeholders.



Now, write your responses to these questions (about 1-2 paragraphs each):

- D3.11 In which domain are you doing best in meeting expectations and where are you doing worst? Is the solution to be found with you or them?
- D3.12 Which relationships would be easiest to change? Which would be hardest? Why? (See Caproni reading on building trust.)
- D3.13 How can you improve performance in one domain by improving performance in other domains *at the same time*? For example, identify how you might improve performance at work by improving performance in the community or at home.
- D3.14 Which domains should you focus on first, given the value you attach to it?
- D3.15 In what ways would your satisfaction with each domain (D1.12) improve if expectations were better met as a result of innovations you might try?
- D3.16 What concerns do you have about undertaking dialogues with your stakeholders about both expectations and ideas for achieving cross-domain synergies?

D3.17 In class we're planning to do an exercise (role reversal, described in reading from R. Shell, p. 82-83) in which you play the role of one of your stakeholders and another participant plays you. Write a short description of the scenario so one of your peers can read and understand it well enough to play the role of you.

D3.18 Patterns of Interaction Chart

This assessment shows how you use different forms of communication -- face-to-face, virtual real-time (shifting place but not time -- e.g., phone, Instant Messaging, videoconferencing), and virtual asynchronous (shifting both time and place -- e.g., voicemail, email) -- with each of your key stakeholders. For each stakeholder, indicate in % how much of your total interaction time with this stakeholder is conducted through each form of communication. The total for each row should equal 100%. For example, if you spend 50% in face-to-face with your boss (W1), 20% on the phone, and 30% by email and voicemail, the numbers in the columns of the first row would be 50, 20, and 30, respectively.

Stakeholders	Face-to-face	Virtual Real-time	Virtual asynchronous	Total = 100%
W1				100
W2				100
W3				100
W4				100
H1				100
H2				100
H3				100
H4				100
C1				100
C2				100
C3				100
C4				100

Write brief notes in response to the following questions (about 1-2 paragraphs each):

D3.19 What patterns do you see in this chart?

D3.20 What are the consequences of your use of different forms of communication for your capacity to align domains and achieve your performance goals in each domain?

D3.21 What opportunities can you create to more effectively use different forms of communication with key stakeholders (see Cohen & Prusak reading)?

Class Sessions 1/29, 1/31, 2/5, and 2/7
Be Whole: Act with Integrity by Respecting the Whole Person

Goals

- Understand the value of recognizing and supporting the whole person
- Assess compatibility and conflict among stakeholder expectations
- Interpret stakeholder assessments
- Understand the purpose of stakeholder dialogues and prepare for them
- Review basic negotiation principles
- Learn from alumni perspectives on stakeholder dialogues

Read

- Friedman, S. D. 2008. *Total Leadership: be a better leader, have a richer life.* Chapters 4 and 5.
- Friedman, S. D. 2005. *Total Leadership stakeholder dialogues guide.*
- Shell, G. R., 1999. The fifth foundation: the other party's interests. In G. R. Shell, *Bargaining for advantage.* New York: Penguin, 58-88.
- D4s written by your peers on your D3.

1/31 -- Deliverable 4
Peer Feedback on D3 – Stakeholder Assessment
(Time Commitment: Medium – 5 Points)

Read

- Friedman, S. D. 2005. *Notes on Deliverable 3: Stakeholder Assessment*

Action

Provide constructive feedback to your client and another peer on their D3s. Open and save a copy, adding your initials to the end of the file name. Using 'Track Changes' in 'Tools' write your comments and save this new copy with your initials following the file name. Post it to your client's personal folder.

Include comments in the text throughout the paper.

Conclude with a paragraph that includes your observations in summary on both strengths and areas for improvement. Add any suggestions and ideas that you believe will be useful. Write your name at the end of your summary comment.

About Stakeholder Dialogues

This section offers guidelines on first preparing for and then conducting your dialogues with key stakeholders. Read Friedman Chapter 5 before starting your dialogues.

Step 1. Prepare for dialogues with key stakeholders.

Your goal now is to prepare for your conversations with your key stakeholders. You will want to be clear in your own mind about how to clarify and validate the expectations of your key stakeholders (since you may not fully understand them). You will also want to understand the difference between positions and underlying interests as a way to negotiate with your stakeholders and perhaps reframe some of their expectations (as well as your own). In addition, you will want to understand your current patterns of interaction so that you can explore potential opportunities for improving them.

Verifying expectations. Your diagnosis of your stakeholders' expectations was based on your beliefs about what they expect from you. These perceptions may or may not be accurate. So the first challenge in preparing for action with your stakeholders is to develop a strategy for confirming or validating your perceptions and clarifying them further. Think about how you would approach each of your stakeholders and engage them in this kind of dialogue. The guidelines below are intended to help you in this preparation.

- ❑ Ask them what they need, desire or want from you.
- ❑ Discuss your perception of what you believe they want and need from you using "I statements" ("I think that you want me to . . ."). Ask them whether your perception is correct. If not, ask them to clarify.
- ❑ Ask them what you can do to be a better . . . friend....boss...employee . . . spouse...colleague. . child . . . sibling....citizen....etc.
- ❑ Listen actively to their response, restate it in your own words and ask them to confirm.
- ❑ Don't let emotion get in the way of your understanding.
 - Try to see your relationship from their perspective.
 - Don't blame them for any problems that may exist in your relationship.
 - Be sensitive to their feelings and acknowledge them.
 - Distinguish your fears from their intent.

Using the guidelines above, prepare for your discussions with each of your key stakeholders. Consider how you will introduce the discussion and what questions you want to ask.

Negotiating expectations: the search for compatibility. After you have a strategy for validating and clarifying each of your stakeholders' expectations, it is recommended that you give some thought as to how you can reframe his or her expectations (as well as your own) to create greater compatibility among your different stakeholders. One way to do this is to distinguish stated positions from underlying interests.

Expectations are stated positions or surface needs. They do not necessarily reflect the person's underlying need, desire, concern or fear for stating the position. Understanding the person's underlying interests can help you understand what is motivating the person. It also opens up the possibility for multiple, alternative solutions since there may be several ways to satisfy the underlying interest. Research suggests that this distinction between stated positions and underlying interests is central to successful negotiation. Specific strategies for distinguishing stated positions from underlying interests include:

- ❑ Ask "why?" Ask "why not" and think about their choice.
- ❑ Search for the basic human need underlying the stated position.
- ❑ Recognize that there may be multiple interests.
- ❑ Make a list.
- ❑ Look forward not back.
- ❑ Be concrete.

Think about each of your stakeholders and develop a strategy for distinguishing their stated positions from their underlying interests. Think about your own expectations from this perspective and see if you can identify your own underlying interests. One of the strongest tools for creating compatibility in relationships is to reframe your own expectations. Identifying your underlying interests is one effective way to understand your own underlying motives and open yourself up to a variety of possibilities for satisfying your interests. The same is true with your stakeholders. Distinguishing stated positions from underlying interests provides a way for better understanding the needs of your stakeholders. It also provides a basis for identifying alternative ways to satisfy their interests.

Step 2. Conduct stakeholder dialogues.

Once you have prepared for action, set up an opportunity to have a dialogue with each of your stakeholders. In these discussions, use your planning and preparation to:

- ❑ Clarify and validate their expectations
- ❑ Distinguish their stated positions from their underlying interests and reframe their expectations (as well as your own) as appropriate
- ❑ Explore with them how you might meet these reframed expectations using leadership tools and communications tools.

Based on these discussions and the new information from them, it is recommended that you update your assessments. These updates will help you develop your action plan.

Class Session 2/12

Building Trust and Credibility

Goals

- Realize the value of creating relationships built on trust
- Understand what you have done and can do to build trust and credibility

Read

- Caproni, P. J, 2001. Building trust. In P. J. Caproni, *The practical coach: management skills for everyday life*. Upper Saddle River, NJ: Prentice-Hall, 63-81.

Session 2/14

The plan for this class will be determined based on student interest as we near it.

**2/19 -- Deliverable 5
Stakeholder Dialogues
(Time Commitment: High – 15 Points)**

After you have completed your stakeholder dialogues, review your initial stakeholder assessments. Then write a note (2 pages max.) describing the key insights you gained from your dialogues. Respond to each of the following items:

- D5.1 Identify surprises that emerged about stakeholder expectations, yours and theirs.
- D5.2 Describe new insights about how your different domains affect each other.
- D5.3 Describe what became of any concerns you had going in to the dialogues.
- D5.4 Note specific ideas for experiments that came out of the dialogues.

Read

- Friedman, S. D. 2005. *Notes on Deliverable 5: Stakeholder Dialogues*.

**Class Session 2/19
Recognize and Support the Whole Person:
Stakeholder Dialogues**

Goals

- Review results of stakeholder dialogues
- Develop further ideas for experiments

**Class Session 2/21
Leading in a Virtual World**

Goal

- Understand how to apply virtual communication to build relationships and achieve better results as a leader in all domains

Read

- Cohen, D. and Prusak, L., 2001. The challenge of virtuality. In D. Cohen and L. Prusak, *In good company: how social capital makes organizations work*. Boston: Harvard Business School Press, 155-181.

2/26 -- Deliverable 6
Be Innovative: Game Plans and Scorecards for Experiments
(Time Commitment: High – 20 Points)

Now that you have completed the personal and stakeholder assessments, you're ready to compose a plan for your experiments. The most effective experiments apply the three TL Principles and Skills in ways that help you meet real leadership challenges in all parts of your life. Take the following steps to design your experiments and complete D6.

Step 1: Understand the goals and guidelines for TL experiments.

Read Friedman Chapter 6 and the *Total Leadership experiment guide*, especially as noted in the pages below, for more information on experiments, goals and metrics, including numerous examples.

Goals. A primary goal of your experiments is to produce four-way wins; to initiate innovations that capture synergies among life domains and thereby realize gains in performance, satisfaction, and alignment.

Your TL experiments are self-designed leadership challenges. Experiments provide you with opportunities to try new ways of getting work done while minimizing the risks associated with change.

The innovations in your experiments may be as big as you are prepared to undertake. While it is not expected that all experiments will go as planned, it is anticipated that the investments you make in them will generate increased business results and enriched lives, both yours and those of the primary stakeholders in all domains. More specifically, the underlying expectation is that you will increase productivity and effectiveness by:

- understanding expectations of stakeholders in the domains of your life (work, home, community, self) and aligning them with your leadership vision and values
- taking a systems view of your life and figuring out where the synergies are among these expectations and how they reinforce or conflict with each other
- creating new ways of working that allow you to meet expectations in innovative ways that give you greater flexibility and control over how your time is spent

Experiments are also intended to produce change in how you think about yourself as a leader in all aspects of your life. The three aspects of leadership identity, or mindset, that we focus on are *authenticity*, *integrity*, and *creativity*.

- Authenticity, being real, is about being yourself wherever you are, wherever you go. It is seen in leaders who act in ways that are consistent with their core values.
- Integrity, being whole, is about fitting together the pieces of your life so that it has coherence and consistency.
- Creativity, being innovative, is about having the will to learn continually while helping others to do the same, questioning traditional assumptions and experimenting with how things are done.

Guidelines. While the range of experiments is wide (as described later), it is expected that each will follow the six guidelines described below.

1. Use your organization (including people who report to you or around you) or a significant part of it. The intent of the experiment is to involve as much of the organization directly affected by your leadership actions as possible. It should involve you and your colleagues in accomplishing current workload and objectives. Your experiment might affect the larger organization (including colleagues and customers in other parts of the organization) your primary focus should be on your immediate work arena.

2. Use the TL assessments to rethink how you approach work as an integral part of your life. The TL assessments help you take a systems view of your work as a leader within the context of your total life situation. The assessments should help you understand where the domains in your life are compatible and where they are in conflict. They should also assist you in seeing how well you are meeting the expectations of your stakeholders and vice versa. Together the assessments should stimulate your thinking about where synergies exist. You should design your experiment to try out approaches that are likely to increase compatibility across the domains in your life and yield greater satisfaction of expectations, your own and your stakeholders.

3. Experiment at work, at home, and in your community with where, when, and how you get things done to deal better with existing workload. Use your experiment as an opportunity for you and others to try working from a broader, total life perspective. The experiment might include working in different locations on flexible schedules, using different modes of communications in new ways to better accomplish your current workload and better meet expectations in all your life domains. Flexibility in time and space provides a chance for you and your stakeholders to try new approaches for finding synergies among domains to increase performance.

4. Develop custom metrics for learning that are indicative of both short-term business results (e.g., immediate performance), long-term business results (e.g., attraction and retention of talent), and results at home, in the community, and for your self. Experiments need metrics to track progress and provide a basis for learning what works and what doesn't. The standard PS&A assessments allow you to see your progress in performance, satisfaction, and alignment among your life domains. You will also need to create customized metrics to track the actions you are taking in your experiments as well as any additional indicators of results that are unique to your experiments. Be as specific as you can be. Metrics are not being established as a commitment to deliver specific results. Rather, they are being established to provide a benchmark for learning. *The only way to fail with your experiment is to not learn from it.*

5. Demonstrate leadership by influencing key stakeholders in all domains necessary to conduct your experiment. The experiment is a leadership challenge. By its nature your experiment will require the courage to take on outmoded cultural messages and to take a stand for needed changes. Your personal leadership vision and values are the foundation for your efforts. You engage in dialogue and negotiation with key stakeholders in order to understand each other's expectations, to gain support, and to agree on strategies for satisfying each other's interests. Your experiment gives you an opportunity to drive innovative change and to try new forms of delegation that create flexibility and increased focus on performance and results, in all domains. As you

experiment with how work gets done, you will need to influence others so that they see the value of this type of experimentation and understand that leadership goes beyond the work domain.

6. Consolidate lessons learned into your own philosophy to use in educating others. You are acting as an agent of learning -- for yourself and for those around you - in conducting your experiment. Your leadership philosophy is a vehicle for you to describe the lessons you've learned about TL in a compelling, personal way. It should convey the intent underlying your experiment, the underlying values for the idea, the results you achieved, and your key lessons learned. You should be able to present your story and your philosophy in a compelling manner to spur transformation in your organization, your community, and among your friends and family.

Step 2: Learn about the nine types of experiments.

There are nine general types of experiments described below and illustrated in detail in *Nine types of experiments in the design of work and life* and in the *Total Leadership experiment guide* (which has very brief synopses of past experiments and examples of actions metrics for each type). Ideally you will do three different experiments.

- **Tracking and Reflecting.** These experiments involve keeping record of activity, thoughts, and feelings (and in some cases distributing it to friends, family) to assess progress on personal and professional goals, thereby increasing self-awareness and maintaining priorities which, in turn, serves to clarify what's important.
- **Planning and Organizing.** These experiments involve taking new actions designed to better use time and prepare and plan for the future by, for example, using a new technology or tool for organizing, creating "to do" lists that involve all life domains, or engaging in a new form of career or family planning.
- **Rejuvenating and Restoring.** Experiments that involve attending to body, mind, and spirit so that the tasks of living and working are undertaken with renewed power, focus, and commitment. For many participants, engaging in a regular program of exercise becomes an important point of focus for their leadership experiments. Experiments in this category help to prioritize what's most important in order to be productive as leaders in all life domains.
- **Appreciating and Caring.** These experiments involve having fun with people (e.g., by doing things that are typically outside of work with co-workers), caring for others, and appreciating relationships as a way of bonding at a basic human level to recognize and respect the whole person which, in turn, increases trust and, further, the capacity to experiment with new work methods.
- **Focusing and Concentrating.** These kinds of experiments are very common among participants. They involve efforts to be physically and/or psychologically present when needed to pay attention to stakeholders who matter most. Sometimes this means saying "no" to certain opportunities or obligations. Experiments of this type include attempts to better recognize and respect the important people encountered in different life roles, and the need be accessible attend in a focused way to them and to important tasks/activities.
- **Revealing and Engaging.** These involve sharing more of your self with others -- and listening to them -- so that they can better understand and support both your values and the steps you want to take towards realizing your leadership vision. Leaders continually build and maintain connections to people who matter in all

domains, and by enhancing communication about different aspects of life with others you demonstrate respect and recognition of the whole person.

- ***Time-shifting and Re-placing.*** These experiments involve working remotely or during different hours to increase flexibility and thus better fit community, family, and self activities while increasing efficiencies. Because they require changes in work methods, these experiments include participants questioning traditional assumptions and trying new means for achieving valued goals.
- ***Delegating and Developing.*** These experiments with how goals are achieved involve re-allocating tasks in ways that increase trust, free up time, and develop skills in self and others; working smarter by reducing and/or eliminating low-priority activities.
- ***Exploring and Venturing.*** These experiments with how goals are achieved involve taking steps towards a starting new job, career, or activity that better aligns one's work, family, community and/or self domains with one's core values.

Hybrids

Sometimes an experiment can best be described as a combination of more than one of the nine general types; a hybrid. However, it's useful to avoid listing a hodge-podge of different experiments as a single experiment. For example, exercising and keeping a log of exercise behaviors, while representing two general types (rejuvenating and restoring plus tracking and reflecting), is a coherent, single experiment. On the other hand, the experimental actions of exercising daily, having dinner with your family, and changing your work hours are not one single experiment but, rather, multiple experiments, and should be described as separate experiments. Do your best to differentiate such actions and design them as multiple experiments for this will clarify your goals, actions, metrics, and results for each experiment.

Step 3: Design your experiments.

You are now ready to draft an initial plan of experimental action that will allow you to better meet the expectations of your multiple stakeholders; to increase results at work and enrich your life as well as those of your stakeholders. Keep in mind that *the main purpose of the experiments is to produce four-way wins*.

Think about how you might arrange work differently and/or initiate new actions or projects, given the expectations of your multiple stakeholders and assuming location and face-time are not constraints. Be creative. Use ideas from the nine types of experiments. Brainstorm possibilities. In light of what you've learned from your assessments, reflect on the possibilities and consider how you might translate them into innovative initiatives that allow you to test your ideas during a trial period for your experiments. How can you, for instance, delegate more effectively, adjust patterns of face-to-face and virtual communication, change how you focus your attention, and in general, use innovative approaches to increase business results by enriching your life and the lives of those around you?

Take the time now to get as clear as you can on your preliminary ideas for your experiments. Think about how you can be creative and experiment with powerful ideas with the potential to meet the main goals and guidelines for the experiments.

Three experiments is the ideal number. Design as many as you can handle given our time frame. This work will be judged by quality, not quantity. Try to construct a plan that will challenge and stretch you so that you learn from your experiments. You might find that your initial ideas for experiments are too broad or too vague. If so, break it down into two or more specific experiments that you can implement now. While experiments can be described as combinations of the nine types of experiments – as hybrids -- it's a good idea to use no more than three different types in describing your experiments.

Use the following worksheets – both the Game Plan worksheet and the Scorecard worksheet -- to formulate and describe each of your experiments. Your coaches will read them and work with you to clarify and refine your ideas for action. Coaches offer different perspectives, all of which can be valuable to you.

Complete a separate Game Plan Worksheet and Scorecard Worksheet for each of your experiments.

Game Plan Worksheet

Respond to each of the questions on both pages of the worksheet (next page).

Scorecard Worksheet

Goals: Intended Impact

In the column labeled "Goals: Intended Impact" describe what you expect will be the benefits – either direct or indirect – of your experiment for each life domain. Include reasons why you believe this experiment will improve *performance* and *satisfaction* in each domain as well as *alignment* among them all. Be creative! Even if it's a stretch, come up with a reason for why this experiment will result in improvements in each domain. Read "Goals for Your Experiment" in the *Total Leadership experiment guide*.

Results Metrics (Customized)

You've already completed the standard assessments that measure performance, satisfaction, and alignment (PS&A) and you'll do so again at the end of your experiment. Now you have an opportunity to create measures of results that are unique to your experiment. Include in the "Results Metrics (Customized)" column the metrics you design to track changes in your performance and/or satisfaction in each domain. *Do your best to include specific indication of expected financial benefits in your work domain* (e.g., cost savings and/or avoidance, productivity improvement, reduced health care costs, benefits of increased commitment and loyalty, and so on).

The key question for whether results metrics are useful is this: Will the metric help me understand whether (or to what degree) I have reached my goal? Read "General Guidelines for Developing Metrics" and "Examples of Results Metrics (Customized)" in the *Total Leadership experiment guide* for suggestions and examples and the section on "Assessing Change" for ideas on how to measure progress.

Action Metrics

Action metrics are measures of things you plan to do during your experiment that will allow you to track your behavior (e.g., number of times exercising per week, hours spent with family, etc.). Action metrics help you monitor what you do. They make it easier to see changes that you are producing, evaluate what's working and what's not, and, if things are not going according to plan, adjust. Someone reading your action metrics should be able to answer "yes" to the following questions about it:

- Will the metric tell me if this person has done what he/she said she would do?
- Would I know how to use this metric if I were tracking my own actions?

Determine the action metrics you plan to use and write them in the column labeled "Action Metrics" in your Goals and Metrics Worksheet. Include as much information about your metrics as possible, including how frequently you will assess them. In the *Total Leadership experiment guide* read "General Guidelines for Developing Metrics" for insight on designing metrics and the sections on "Experimental Action" and the "Compendium on Metrics" for examples.

Game Plan Worksheet for Experiment #1

Your name:

1. In one sentence describe the basic idea for this experiment (and copy this to your Scorecard Worksheet).
2. Describe how your experiment has the potential to accomplish the main goals for TL experiments and how it follows each of the 6 guidelines.
3. How will you practice and apply TL skills (p. 5) in this experiment? Explain by referring explicitly to the specific skills (the main ones, 4 max.) you intend to use.
4. How do you intend to leverage synergies across domains?
5. How would you explain this experiment so that a friend might understand it easily? "I will _____ because this will improve _____, _____, _____, and _____."
6. What assistance, advice or information do you need to implement this experiment?
7. What are the 2 or 3 most significant obstacles you will need to overcome to implement this experiment?
8. In what ways is this initiative innovative? What's new about it, for you?
9. In what ways is this experiment informed by what you learned from your assessments and dialogues?

10. Place an "X" next to the type of experiment that best describes yours. Read the descriptions of the nine types (see *Total Leadership experiments guide* on "Examples of Nine Types of Experiments"). Yours may represent more than one type. For example, exercising and tracking your exercise behaviors would be both *rejuvenating and restoring* and *tracking and reflecting*. In this case, write an "X" next to both types. In no case, however, should you write more than three "X's" below.

Tracking and reflecting	
Planning and organizing	
Rejuvenating and restoring	
Appreciating and caring	
Focusing and concentrating	
Revealing and engaging	
Time-shifting and re-placing	
Delegating and developing	
Exploring and venturing	

In a sentence or two, explain why this is the best way to classify your experiment.

11. Does your experiment involve a change in your use of technology? Underline either of the following -- Yes or No – and then explain your choice.

- Underline "Yes" if you are (a) using a new kind technology and/or (b) changing how much you use certain types of technology (more or less). This includes starting to use IM, a Palm Pilot or Blackberry; making more phone calls; creating a website; changing your communication from phone to face-to-face, or from face-to-face to phone; using email more (or less); etc.
- Underline "No" if you are changing neither type nor amount of technology.

12. Does your experiment involve combining domains or bounding them? Underline either of the following -- Combining or Bounding – and then explain your choice.

- Underline "Combining" if you are bringing people/activities from different domains together (e.g., exercising with spouse; inviting coworkers home for dinner); discussing issues emanating in one domain with stakeholders from another (e.g., talking about work with family); using skills from one domain in another (e.g., using knowledge from work with friends); re-thinking how activity in one domain affects others (e.g., showing employees how their work helps make the world better); making boundaries between domains more permeable.
- Underline "Bounding" if you are encouraging people/activities from different domains to become or stay separate (e.g., not answering work phone calls at home or personal calls at work); not discussing issues from one domain with stakeholders from another (e.g., not talking about work during family dinner); not using behaviors from one domain in another (e.g., not using work leadership style when with family); doing something within a single domain, without overlap with other domains; making the boundaries between domains thicker, less permeable.

Scorecard Worksheet for Experiment #1

Your name:

Try to include
specific indications
of expected financial
benefits in the work

In one sentence describe the basic idea for this experiment:			
	Goal: Intended Impact	Results Metrics (Customized)	Action Metrics
Work			
Home			
Community			
Self			

Copy this worksheet (for your own use only, please) to describe additional experiments that you plan to undertake.

2/28 -- Deliverable 7
Peer Feedback on D6 – Game Plans and Scorecards
(Time Commitment: Medium – 5 Points)

Read

- Friedman, S. D. 2005. *Notes on Deliverable 6: Experiments*.

Action

Provide constructive feedback to your client and another peer on their D6s. Open and save a copy, adding your initials to the end of the document name. Using 'Track Changes' in 'Tools' write your comments and save this new copy with your initials following the document name. Post it to your client's personal folder.

Include comments in the text throughout and conclude with a paragraph that includes your observations in summary on both strengths and areas for improvement. Add any suggestions and ideas that you believe will be useful. **Write your name at the end.**

Class Session 2/28
Coaching to Increase Leadership Capacity

Goals

- Learn essential principles for how to coach as a leader
- Upgrade your action plans based on coaching from classmates

Read

- Bacon, T. R. *Nondirective coaching: helping people change*. Telluride, CO: Lore International Institute.

Class Session 3/4, 3/6
Social Capital – Building Networks of Support

Goals

- Understand social capital and the reciprocity principle
- Explore the meaning of “community” for leaders
- Build support among participants for achieving valued goals

Read

- Baker, W. 2000. *Achieving success through social capital*. San Francisco: Jossey-Bass, 1-25, 69-128.

3/18 -- Deliverable 8
Note on Stakeholder Reactions to Experiments
(Time Commitment: Medium – 5 Points)

Read Friedman Chapter 7 and then talk with your stakeholders about your experiments.

- Describe how you believe your plan will lead to meeting their expectations better.
- Understand more about how their interests and expectations (as well as your own) are met through the actions you plan to or have already initiated.
- Explore with them other opportunities for how you might meet these expectations using leadership tools and communications tools.
- Consult with your coach to review insights from these conversations.

For D8, in no more than two pages, describe the key insights you gained from these conversations with your stakeholders and coach about your action plan. Include notes on changes to your assessments and action plan that you decided to make as a result of these conversations. Be sure to update these documents accordingly for these updated versions will assist you as you continue your work on this leadership development experience.

Class Session 3/18
Strengthening Stakeholder Commitment to Your Vision

Goal

- Build greater commitment to your leadership vision and action plans

Read

- Friedman, Chapter 7.

Class Sessions 3/20 Dynamics of Change

Goals

- Understand political barriers to change and how to overcome them
- Learn about managing risk in driving change

Read

- DeLuca, J., 1999. The political blind spot. In J. DeLuca, *Political savvy: systematic approaches to leadership behind the scenes*. Berwyn, PA: EBG Publications, 27-49.

3/25 -- Deliverable 9 Alumni Interview (Time Commitment: Medium – 5 Points)

After reading the articles on managing your boss and leading up, interview a Wharton alumni to find out what he or she has learned from experience about:

- leading when you're not in charge.
- how leaders learn leadership.
- the importance of authenticity, integrity and creativity for driving performance as a leader in all domains of one's life.

Develop a set of questions prior to the interview and review them with a classmate. In no more than 2 pages, describe the main lessons you've learned from this interview about each topic and how you intend to apply them both in the future and in your experiments.

Class Session 3/25 and 3/27 Authenticity, Integrity and Creativity in Leading Up and Down

Goals

- Understand principles for establishing effective relationships with organizational superiors
- Learn more about leadership from Wharton alumni

Read

- Gabarro, J. J. and Kotter, J. P., 1993. Managing your boss. *Harvard Business Review*, May-June, 150-157.
- Useem, M., 2001. Upward leader's calling. In M. Useem, *Leading up how to lead your boss so you both win*. New York: Crown Business/Random House.

Class Session 4/1 and 4/3
Developing Total Leadership Capacity in Organizations

Goal

- Understand the challenges of developing leadership talent in organizations

Read

- Friedman, S. D., 2001. Leadership DNA: The Ford Motor Company story. *Training and Development*, March, 3-7.
- Friedman, S. D. and Lobel, S., 2003. The Happy Workaholic: a role model for employees. *Academy of Management Executive*, 17(3), 87-98.

Class Session 4/8 and 4/10
Social Responsibility and the Spiritual Dimension of Total Leadership

Goal

- Explore connections between personal and corporate values
- Explore the relationship between spiritual growth and leadership capacity

Read

- Hollender, J. and Fenichell, S. 2004. *What matters most*. New York: Basic Books, 1-50.
- Mitroff, I. I. and Denton, E. A., 1999. Acknowledging soul and spirit. In I. I. Mitroff and E. A. Denton, *A spiritual audit of Corporate America*, 1-27.

4/15 – Deliverable 10
Leadership Biography
(Time Commitment: High – 15 Points)

Gather and read publicly available materials on a leader about whom you would like to learn more. In approximately 750 words, address each of the following:

1. Describe his or her major accomplishments in life.
2. How did your subject learn what he or she needed to know about leadership?
3. How did your subject integrate work with other life domains for mutual gain?
4. How did your subject demonstrate authenticity, integrity and creativity in driving performance towards valued goals?
5. How do you intend to apply lessons learned from this leader both in your future and in your total leadership experiment?

Prepare a dynamic and informative 10-minute presentation, using handouts or other aids as you see fit, to share with your classmates the lessons you learned from your study of this leader. The written version and in-class presentation each contribute to your course grade. Peer evaluation will inform the grade assigned for the in-class presentation. Note: If www.totalleadership.org is ready, the format of this assignment might be changed so that your leadership biography can be presented online.

Class Session 4/15 and 4/17
Lessons Learned from Great Leaders

Goals

- Learn how total leadership capacity develops through experience
- Understand how great total leaders achieve results that matter
- Gain insights about total leadership from exemplars

Class Session 4/22
Leadership, Passion, and the Art of Storytelling

Goals

- Understand the value of storytelling for leadership
- Begin to articulate your own leadership story

Read

- Fryer, B. 2003. Storytelling that moves people. A conversation with Robert McKee. *Harvard Business Review*, June, 5-8.
- Friedman, Chapter 8.

4/24 – Deliverable 11
Written Feedback for Classmates
(Time Commitment: Medium – 5 Points)

Write a 1-page narrative per person to the members of your group on strengths and areas for improvement based on performance in contributing to course goals. In a 3-person group, write about your self, too, in the third person. In this way, every student will write a total of 3 narratives. Address what he or she has asked for feedback on (in D1) as well as any other areas you think are important. Be sure to:

- ☐ Follow the guidelines for effective feedback given in the Porter reading
- ☐ Provide a balance of both strengths *and* areas for improvement

Post each note in the person's personal folder on webcafe. For this assignment you may choose to lock access to only yourself, the peer/coach and the instructor. The file should be saved as **yourlastname – D11.doc**.

Class Session 4/24
Reducing Leadership Blind Spots via Feedback

Goals

- Realize the value of feedback in improving performance
- Review and interpret peer feedback

Read

- Porter, L., 1982. Giving and receiving feedback; it will never be easy, but it *can* be better. In *NTL Institute, NTL reading book for human relations training*. Bethel, ME; NTL Institute, 42-45. (In MGMT 652 course pack.)

4/29 – Deliverable 12
Progress Report on Total Leadership Experiments
(Time Commitment: High – 40 Points)

About the Progress Report

This update, your progress report, is to be completed after implementing your experiments. It is our hope that your efforts to develop your total leadership capacity will persist beyond this course and that you'll stay in touch regarding your progress in continually initiating innovation.

The purposes of this update are:

- To document your progress on increasing business results by enriching lives
- To articulate lessons you have learned from your experiments
- To prepare you to teach these lessons to others

The questions that follow ask you to describe what you have done to better align your actions with your values through your experiments; that is, through your stakeholder dialogues and your application of TL principles and skills. You are asked, in other words, to describe the impact of your experiments on your stakeholders in all domains -- work, home, community, and self – as well as on the alignment among domains and the leadership lessons you have learned.

In our final session you will describe your story about the key themes of your progress report: what you did, what you learned, and how you intend to teach these lessons.

Prior to completing the questions below, please do the following:

- Review all your initial assessments and think through how things have changed from the beginning of your experiment until now.
- Review your initial action plan worksheets and any revisions you made to them.
- Communicate with key stakeholders involved in your experiments to get their perspective on how things have changed.
- Gather all relevant data for your metrics.
- Consider what insights on leadership you have gained through your experiments.

Once you have taken these steps you are ready to complete this update by following the instructions starting on the next page. It's useful to read through all five sections and record notes in them before writing your full responses. Record your responses and then post a copy with your name in the filename: **"yourlastname – progressreport.doc."**

D12.1. Describe Each of Your Experiments

Describe (250 max. words on each) what actually happened with the experiments you tried. Do not describe metrics and results in detail here (see below, D12.3); just indicate what you did. Number each experiment as 1, 2, 3, respectively.

D12.2. Update Your Assessments

Update your assessments by following all of the instructions below.

D12.2.1. Your personal leadership vision and values. Paste below your original leadership vision and core values (from D1), and include any revisions that you've made since posting the original. If it hasn't changed, then please just paste the original.

D12.2.2. Briefly describe how your leadership vision and values changed as a result of your experiences this semester. If there has been no change, then briefly describe why.

D12.2.3. Visit psychology.msu.edu/totalleadership (Access ID: totalleadership) to complete the Total Leadership Skills assessment again.

D12.2.3. Complete the chart below by recording both your initial scores for "Importance," "Time/Energy," (both from 0 to 100% with the column total = 100%) and "Satisfaction" (1=not at all; 10=fully satisfied) as well as your current scores (column headings for **"now" in bold**).

	Importance Initial	Importance Now	Time/Energy Initial	Time/Energy Now	Satisfaction Initial	Satisfaction Now
Work						
Home						
Community						
Self						
	100%	100%	100%	100%		
Whole life						

D12.2.4. Describe how the alignment of your values and actions has changed – if at all -- as a result of your experiences this semester.

D12.2.5. Based on what you've learned, what ideas do you have for what you can do to better align your values and actions in the future?

D12.2.6. Four Circles. Following the instructions as before, draw below the four circles as you think they exist now (expand space as needed).

D12.2.7. Describe how your current Four Circles compares with what you drew at the start of our course. Is it the same? If different, describe reasons and impact of changes.

D12.2.8. Describe any ideas you have for what you can do to create greater overlap of the circles, or compatibility among domains, in the future.

D12.2.9. Stakeholder expectations. Revise and review changes in your stakeholder expectations using these instructions to fill out the 7-column chart below.

Column 1: Write in the initials of the stakeholders in the space provided. Make sure that the initials are the same as those in D3, entered in the same order.

Column 2: *My performance in meeting stakeholder expectations of me initially.* Copy your initial scores from your D3 (stakeholder assessment) on the degree to which you were meeting the expectations of your key stakeholders when you first completed D3. In the space provided in Column 2, enter the rating from 1-10 that indicated the degree to which you believed you were meeting that stakeholders' expectations at that time.

Column 3: *My performance in meeting stakeholder expectations of me now.* Enter a number between 1 and 10 that indicates the degree to which you are meeting the expectations of your key stakeholders now. A "10" indicates that you believe you are meeting their expectations fully all of the time. A "5" indicates that you believe you are meeting their expectations some of the time. A "1" indicates that you believe you are never meeting their expectations.

Column 4: *Change in level of stakeholder expectations of me.* In Column 4 enter a number between 1 and 5 that indicates the extent to which the *level* of each of your stakeholders' expectations has changed, if at all:

1. Has *much lower* expectations of me now
2. Has *somewhat lower* expectations of me now
3. Has *the same* expectations of me now
4. Has *somewhat higher* expectations of me now
5. Has *much higher* expectations of me now

Column 5: *Stakeholders' performance in meeting my expectations of them initially.* Copy your initial scores from your D3 on the degree to which your stakeholders were meeting your expectations when you first completed D3. In the space provided in Column 5, enter the rating from 1-10 that indicated the degree to which you believed they were meeting your expectations at that time.

Column 6: *Stakeholders' performance in meeting my expectations of them now.* Enter a number between 1 and 10 that indicates the degree to which you each of your key stakeholders (excluding "self") is meeting your expectations now. A "10" indicates that you believe this stakeholder is meeting your expectations fully all of the time. A "5" indicates that you believe this stakeholder is meeting your expectations some of the time. A "1" indicates that you believe this stakeholder is never meeting your expectations.

Column 7: *Change in level of my expectations of stakeholders.* In Column 7 enter a number between 1 and 5 that indicates the extent to which the *level* of your expectations for each stakeholder has changed, if at all:

1. I have *much lower* expectations of this stakeholder now
2. I have *somewhat lower* expectations of this stakeholder now
3. I have *the same* expectations of this stakeholder now
4. I have *somewhat higher* expectations of this stakeholder now
5. I have *much higher* expectations of this stakeholder now

	Their Expectations of Me			My Expectations of Them		
Column 1 SH Initials	Col. 2 Then	Col. 3 Now	Col. 4 Level	Col. 5 Then	Col. 6 Now	Col. 7 Level
	(1-10)	(1-10)	(1-5)	(1-10)	(1-10)	(1-5)
W1:						
W2:						
W3:						
W4:						
H1:						
H2:						
H3:						
H4:						
C1:						
C2:						
C3:						
C4:						
S: Spirituality						
S: Relaxation						
S: Physical						
S: Emotional						

D12.2.10. Briefly describe your understanding of the changes, if any, in the chart above.

D12.2.11. To what extent were you able to improve performance in one domain by improving performance in other domains?

D12.3. Your Other Metrics and Results

D12.3.1. In your Game Plans and Scorecards, and in any revisions you made to them, you developed metrics, for both results and actions customized to your experiments, beyond the standard assessments you just reviewed above. In the space below (expand as needed), describe the data you gathered from all sources for the metrics -- action and results --you created for your experiments.

Results Metrics Data (describe in as much detail as possible and be sure to include specific indications of financial impact in your work domain)

Action Metrics Data (describe in as much detail as possible)

D12.3.2. If there are any other changes you've observed in performance in any domain, or in the relationship among different domains, please note these here in the space below. If none, proceed to the next section.

D12.3.3. Explain how and why your goals, metrics, results, and timeframe might have changed as a consequence of new information or unexpected situations that arose.

D12.4. Your Leadership Lessons

Conducting your experiment is leadership in action, mobilizing resources towards valued goals. It involves influencing others and creatively initiating innovation. This section asks you to describe what you have learned about leadership. Address what you have learned about each of the following. Draw on course materials and readings as appropriate. Write at least 1 paragraph for each item.

D12.4.1. How acting with authenticity (being real), integrity (being whole), and creativity (being innovative) affects performance.

D12.4.2. The importance of meeting stakeholder expectations to achieve valued goals.

D12.4.3. How to meet the challenges faced when initiating innovation.

D12.4.4. The key attributes of an organization you might want to join or create.

D12.4.5. Leadership skills you have developed (refer to 15 skills listed on p. 5).

D12.4.6. How (if at all) your conception of yourself as a leader has changed.

D12.5. Looking Forward

D12.5.1. What is the major obstacle you face in maintaining the momentum you were able to build through your work in our course and how do you intend to deal with it?

D12.5.2. How will you use what you learned to teach others about leadership and change?

D12.5.3. 2-3 key elements of your leadership development agenda for the next 3 years.

D12.5.4. Offer 2-3 specific suggestions for future participants doing experiments.

D12.5.5. Write a 1-paragraph note to Stew, as if this were 5 years from now, describing how the lessons from the experiment influenced your career and life.

Class Session 4/29 (Dinner)
Looking Back, Looking Forward

Goals

- Tell your own leadership story and listen to others'
- Review course objectives and synthesize lessons learned

Read

- Progress Reports (D12) written by your teammates.
- Gardner, J. W., 1994. The road to self-renewal. *Stanford Alumni Magazine*, March, 32-35.

One last thing: Please complete a very brief survey about your Alumni Coach prior to our closing class session. Details TBA.

Course Readings

- Friedman, S. D. 2008. *Total Leadership: Be a Better Leader, Have a Richer Life*. Boston: Harvard Business School Press. Pre-publication draft available on webCafe.
- Friedman, S. D. 2005. *Changes in leadership performance and identity*.
- Friedman, S. D., Christensen, P. & DeGroot, J. 1998. Work and life: the end of the zero-sum game. *Harvard Business Review*, Nov-Dec, 119-129.
- Friedman, S. D. 2005. *Total Leadership coach's guide*.
- Friedman, S. D. 2005. *Notes on Deliverable 1: Personal Assessment*.
- Friedman, S. D., 2005. *Total Leadership: media coverage*. Compilation of articles.
- Friedman, S. D. 2005. *Total Leadership stakeholder dialogues guide*.
- Shell, G. R., 1999. The fifth foundation: the other party's interests. In G. R. Shell, *Bargaining for advantage*. New York: Penguin, 58-88.
- Friedman, S. D. 2005. *Notes on Deliverable 3: Stakeholder Assessment*.
- Caproni, P. J, 2001. Building trust. In P. J. Caproni, *The practical coach: management skills for everyday life*. Upper Saddle River, NJ: Prentice-Hall, 63-81.
- Friedman, S. D. 2005. *Notes on Deliverable 5: Stakeholder Dialogues*.
- Cohen, D. and Prusak, L., 2001. The challenge of virtuality. In D. Cohen and L. Prusak, *In good company: how social capital makes organizations work*. Boston: Harvard Business School Press, 155-181.
- Friedman, S. D. 2005. *Total Leadership experiment guide*.
- Friedman, S. D. 2005. *Nine types of experiments in the design of work and life*.
- Friedman, S. D. 2005. *Notes on Deliverable 6: Experiments*.
- Bacon, T. R. *Nondirective coaching: helping people change*. Telluride, CO: Lore International Institute.
- Baker, W. 2000. *Achieving success through social capital*. San Francisco: Jossey-Bass, 1-25, 69-128.
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- Gardner, J. W., 1994. The road to self-renewal. *Stanford Alumni Magazine*, March, 32-35.