MGMT 671, Executive Leadership
WEMBA 43 West, Summer 2018

The Wharton School
University of Pennsylvania

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Total Leadership Online (TLO)

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 leader in all aspects of your life. We start with you, the developing leader, as a whole person. The challenge is to use leadership skills to improve performance in all 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 most.

Now more than ever leadership is not just about work, it's about life. 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 integrating work, home, community, and self – and improving performance in all these parts – by 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. In this course you have the opportunity to learn the 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 and interdependently with your classmates to create an interactive community in which you learn and are enriched by their experiences. The instructor facilitates discussion and students are expected to come prepared to highlight what from the readings is most useful and important. We use a variety of methods to support learning by doing; peer coaching, readings, class dialogues, interaction with alumni, and extensive written exercises and assignments to prepare for and reflect on your actions.

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Course Plan



Begin

- Overview course goals and set performance expectations.
- Understand Total Leadership principles and method.

Be Real: Clarify What's Important and Take the Four-Way View

- Explore being real – acting with authenticity by clarifying what's important.
- Articulate your personal leadership vision – your legacy – and your values.
- Take the four-way view – work, home, community, and self (mind, body, spirit).

Be Whole: Respect the Whole Person and Talk to Your Stakeholders

- Explore being whole – acting with integrity by respecting the most important people.
- Identify key stakeholders in all parts of life and mutual performance expectations.
- Understand the purpose of stakeholder dialogues, prepare for and conduct them.
- Realize the value of creating trusting relationships and learn how to build them.
- Explore how to use various media to build relationships and achieve results.
- Discover how to enhance integrity by making the parts fit together better as a whole.

Be Innovative: Design Experiments and Bring Others Along with You

- Explore being innovative – acting with creativity by experimenting.
- Design experiments to produce four-way wins and upgrade them based on feedback.
- Understand risks of and barriers to change and how to overcome them.
- Understand social capital and the reciprocity principle.
- Build commitment to and support for your vision and plans for change.

Reflect and Grow

- Understand the value of storytelling for leadership.
- Review course goals, results, peer feedback, and lessons learned.
- Generate ideas for sustaining your growth as a leader.

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About Total Leadership Exercises

Purposes

The initial exercises are designed to help you understand the Total Leadership model and how to use your experiments to learn about achieving four-way wins; to take meaningful steps towards becoming a better leader, having a richer life. Each of the exercises gives you a different perspective on how the principles apply to you. The exercises in the first two parts of the book provide a disciplined approach to building a systems view of the domains in your life. Your experiments, in the third part, create opportunities for you to practice the skills associated with being innovative.

Everyone has their own comfort level about how much they wish to disclose about the various domains of their lives. There is no intent to intrude into your privacy (please see p. 6). 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 responses to the exercises. It is useful to take your time and to be thoughtful about your responses on the initial exercises because they influence your subsequent dialogues with stakeholders and actions in your experiments. Again, it is expected that, by the end of your experiments, you will learn more about achieving both greater harmony among the domains and greater satisfaction of stakeholder expectations. Your initial assessments will look different than they did at the start, indicating personal growth and lessons learned about creating change.

Measurement

The assessments track performance, satisfaction, and alignment at the beginning and at the end of our course. This allows for an examination of three kinds of changes that result from experiments. The <u>standard</u> assessments (done by all) are described below and detailed in the book and elsewhere. You will also design your own <u>customized</u> metrics to monitor actions and assess results of your experiments.

<u>Performance</u>

The standard performance assessments focus on:

- *My Total Leadership Skills* (an 18-item survey). For each of the main principles of Total Leadership – Be Real, Be Whole, Be Innovative – there are six items.
- *My Life as a Leader*. Nine items, one for each of the Total Leadership principles.
- How well you meet performance expectations of your key stakeholders. You assess stakeholder performance in exercises in the Be Whole part and then again at the end, thus comparing before and after your dialogues and experiments.

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Satisfaction and Well-Being

You assess your satisfaction and well-being in each of the four domains and your life as a whole, at the start and end of our course.

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 the Four-Way Attention Chart and the Four Circles. Both are completed in the first part of our course and again at the end.

About Peer Coaching

Read Appendix A before getting started on your participation in our coaching network as both peer coach and client. Follow the guidelines there and below when completing your comments on exercises. To receive credit for having completed the exercises in which you comment on your peers' work, at a minimum provide a comment on the last exercise in the set that address all of the exercises in the set by each of your clients.

Peer-to-peer feedback is a critically important aspect of our course. There are many opportunities for giving and receiving both written and verbal coaching throughout our course. Your performance as a coach will have a substantial impact on the value of our course. Constructive feedback should not be thought of as "having all the right answers". Instead, provoke your client to examine the issues further by providing encouragement and by asking the right questions of his or her work. To ensure that you do this, ask *yourself* these questions:

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

Conclude your comments on each set of exercises composed by your clients with a note on your observations about both strengths and areas for improvement. Add any suggestions and ideas that you believe will be useful. 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, keep in mind that your clients are here because they want to learn. The more you engage actively as a coach in provoking further thought, the better. Don't hold back!

As part of each of the peer coaching exchanges, you provide feedback to each of your coaches to let them know what they did well and how they might be more helpful in providing written and verbal coaching. The purpose of this feedback is to improve the quality and impact of both the written and verbal coaching in each successive round, and beyond our course.

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Administration

Readings

Friedman's *Total Leadership: Be a Better Leader, Have a Richer Life* (Harvard Business Press) is the core reading. Other readings will be made available, and new ones may be added, depending on student interest. For certain assignments, you will need to acquire additional readings or materials. *You are expected to complete all assigned readings on time and be ready to apply them in class and in exercises on TLO.* Follow up with Prof. Friedman about anything we don't cover in class that is of interest to you.

Grading

This is a 1-credit course, even though the meeting times are for the standard .5-credit course. That's because of the expected amount of effort expended outside of class sessions. Your course grade is determined by your performance on:

Contribution to Community: 35%
Exercises on TLO: 65%

Contribution to Community

Contribution grade is based on quantity and quality of what you bring to our community. Attendance is required for all classes. Unexcused absences result in deductions from your contribution score. Excused absences (defined by Wharton policy) should be reported via email to Prof. Friedman prior to class. More than one unexcused absence is grounds for dismissal from the course. For a session you must miss, to help you stay on track it's recommended that you interview a few classmates about that session and then send a note, within three days of the session, to Prof. Friedman about the essential content.

Positive contribution involves being (a) prepared to accurately discuss relevant course material, (b) curious, and (c) respectful and compassionate with others. Please be on time, in fairness to your classmates. Classes are technology-free, unless otherwise indicated by Prof. Friedman for special purposes: During class, digital devices are not to be used. If you need to use one urgently, please leave the room and return when you are available to be present. When we split into small groups, which we will do frequently, please do not use this as an opportunity to leave the room, check messages, etc.

Also, each class includes a brief check-in written on Canvas to allow for every student to have an ongoing dialogue with Prof. Friedman and to assess your grasp of the concepts and tools. You will hear back from Prof. Friedman if your check-in post either does not meet expectations *or* exceeds expectations; most students meet expectations.

Contribution is not limited to the classroom, for there is opportunity to participate online and otherwise. Provide links and participate online via Canvas discussions or other social media. Take whatever initiatives you can to advance our course goals.

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Exercises on TLO

The system for evaluation and feedback on the exercises is designed to provide a simple process for tracking your progress. You will get a note from either Prof. Friedman or Michelle (our TA) via TLO on each set of exercises. **This note will appear as a comment on the last exercise in each set of exercises.** For the sake of fairness, a grade reduction will be applied to late exercises, starting at due date and time.

Prof. Friedman's Notes on TL Exercises is a file with general comments the exercises. Please read these comments as you're writing each set of exercises, or just afterwards, when you get feedback. If you would like more specific feedback on your exercises, let us know and we will be happy to provide it. For inspiration and guidance, check out the exemplary work on these exercises from prior students here.

If your exercises do not meet expectations, it's usually a matter of incompleteness, insufficient information, or lack of understanding of key principles. Most students meet expectations on all assignments, which means posting on time, demonstrating grasp of key concepts, and presenting information and ideas coherently and cogently. If you don't, or if you exceed expectations, we will let you know. To exceed expectations is to demonstrate exceptional understanding and application of key principles and to address all issues very comprehensively. Assignments are weighted (1x, 2x, 3x, and 6x) to indicate roughly the differences in expected effort (see Schedule for All Exercises).

Either Prof. Friedman or our TA will evaluate your exercises, and two other students will provide feedback on them. You are both coach and client for two others and you are encouraged (with extra contribution credit) to comment on others' exercises too.

To pass the course you must complete all exercises on TLO and other assignments.

Privacy and Confidentiality

You have control over who sees the content you produce for our course through the use of the privacy settings on our community Web site. In addition, the Wharton Code of Ethics addresses the issue of how to manage information available to you as a student:

> *The Wharton student is expected to respect the materials, data, and property of other members of the Wharton community…The student will not misuse or misappropriate the materials, data, or other property of another, especially through, but not limited to…Divulging or distributing proprietary or confidentially provided information obtained for class assignments…*

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Responsibility for Participation and Progress

The role of the instructor is to provide the structured set of activities for undertaking TL exercises and to cultivate a learning community in which students grapple with relevant ideas and experiences in a systematic manner. For you to gain the benefits this course is designed to produce, you must participate actively in advancing course goals.

Because you work closely with others in our class, missed deadlines or absences from sessions create problems for your progress and the progress of others. If you are going to miss a session, or if you think you might miss an exercise or assignment deadline, notify Prof. Friedman, our TA, and your coaching group prior to the deadline to make other arrangements. For fairness' sake, credit will be deducted for any lateness. For missed classes: Talk to classmates about the main takeaways and write a note describing them and any questions to Prof. Friedman within a few days of the missed class.

We know there might be extenuating circumstances that make it difficult to complete required actions on time and to attend class. However, because each student's work affects others, our policy is that *a student can be dismissed from the course if* he or she:

- Persistently fails either to maintain timely progress on exercises or to attend sessions on time and for the full length.
- Misses a deadline for an exercise or written assignment without prior notice.
- Misses more than one class for any reason.

Because essential start-up work occurs in the first two classes, attendance at both (on May 10 and 11) is mandatory. Except for extraordinary circumstances, if you are not able to be present for both classes, with assignments completed on time, then you cannot proceed in the course.

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Schedule for All Exercises on TLO and Assignments

Exercises are posted on TLO – beta.totalleadership.org. Exercise numbers listed below correspond to the numbering system on TLO. Sets of exercises are weighted (Wt. = 1x, 2x, 3x, or 6x) to indicate roughly differences among them in expected effort.

Be specific and comprehensive when answering questions and completing exercises. The more you are able to detail your thoughts, the more you will get from these exercises and the better positioned your peers will be to help give you feedback. Reading and commenting on others' exercises, beyond those assigned to you in your coaching group, is strongly encouraged. This leads to an open environment for our learning community. The more you contribute to others, the more you learn.

Here's how to read ahead about TLO exercises down the road: Click "My Exercises," then "Write," and then use the drop-down menu to preview future exercises, but do not complete them out of sequence.

Exercises on TLO appear in green (original content), orange (peer comments), and light blue (coaching reflections). **TLO exercises are due 11:00 PM PDT on date assigned.**

Due	Ex. #	Wt.	Description
5/7	01-06	3x	Begin and Be Real Exercises / TL Survey 1
5/9	07	1x	Comments on Begin and Be Real Exercises
5/10, 5/11			Class sessions
5/15	08	1x	Reflections on Coaching: Begin and Be Real Exercises
6/4	09-14	3x	Be Whole: Stakeholder Analysis
6/6	15	1x	Comments on Stakeholder Analysis
6/8, 6/9			Class sessions
6/12	16	1x	Reflections on Coaching: Stakeholder Analysis
7/1	17	3x	Be Whole: Stakeholder Dialogues
7/3	18-19	3x	Be Innovative: Designs for Experiments
7/5	20	1x	Comments on Dialogues and Experiments
7/6, 7/7			Class sessions
7/10	21	1x	Reflections on Coaching: Dialogues and Experiments
7/31	22-23	2x	Serve *Their* Interests
8/2	24	1x	Comments on Serve *Their* Interests
8/3–8/4			Trios meet for one hour (via video, voice, or in person)
8/8	25	1x	Reflections on Coaching: Serve *Their* Interests
8/13	26-29	6x	Reflect and Grow: Progress Report
8/15	30	1x	Comments on Progress Report
8/17			Class session
8/21			TL Survey 2

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Class Schedule

The goals for each session are listed below, and in boxes are required readings, exercises on TLO, and other assignments. Exercises on TLO appear in green (original content), orange (peer comments), and light blue (reflections on coaching).

Exercises on TLO are due 11:00 PM PDT on date assigned.

May 10 and 11

Goals / Values / Vision / Four-Way View

Understand our course goals and performance expectations. Ensure grasp of the Total Leadership approach. Explore being real – acting with authenticity by clarifying what's important. Tell the story of how your values have been shaped by your experience. Articulate your personal leadership vision – your legacy – and your values and respond to your classmates' visions. Take the four-way view – work, home, community, and self (mind, body, spirit) – and explore what this perspective means for your future.

Read	Syllabus, *TL* Preface, Chapters 1, 2, 3, and Appendix A	
Check-in	Syllabus, *TL* Chapter 1, 2 and 3	
TLO May 7	Exs. 01-06	Begin and Be Real Exercises (3x) TL Survey 1
TLO May 9	Ex. 07	Comments on Begin and Be Real Exercises (1x)
TLO May 15	Ex. 08	Reflections on Coaching: Begin and Be Real (1x)

June 8 and 9

Stakeholder Analysis and Dialogues / Alumni Perspectives

Explore being whole – acting with integrity by respecting your most important people. Identify key stakeholders in all parts of life and mutual performance expectations. Understand the purpose of stakeholder dialogues and prepare for them. Gain insight about best practices in conducting stakeholder dialogues. Learn how to gain value from our course from Wharton alumni who took it.

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Read	*TL* Chapters 4 and 5	
Check-in	*TL* Chapters 4 and 5	
TLO June 4	Exs. 09-14	Be Whole: Stakeholder Analysis (3x)
TLO June 6	Ex. 15	Comments on Stakeholder Analysis (1x)
TLO June 12	Ex. 16	Reflections on Coaching: Stakeholder Analysis (1x)

July 6 and 7

Insights from Dialogues / Ideas for Experiments

Review insights from stakeholder dialogues and lessons learned about how to enhance integrity by making the parts fit together better. Explore being innovative – acting with creativity by experimenting. Understand and apply theory of small wins. Upgrade initial ideas for experiments. Practice non-directive coaching skills. Learn about social capital and the reciprocity principle – and experience it in Help Fest.

Read	*TL* Chapter 6	
Check-in	*TL* Chapter 6	
TLO July 1	Ex. 17	Be Whole: Stakeholder Dialogues (3x)
TLO July 3	Exs. 18-19	Designs for Experiments (3x)
TLO July 5	Ex. 20	Comments on Dialogues and Experiments (1x)
TLO July 10	Ex. 21	Reflections on Coaching: Dialogues + Expts. (1x)

August 3 or 4
Trio Meeting

Bringing Others Along with You

Understand barriers to change and how to overcome them by aligning interests and helping others win. Learn more about managing risk when leading change.

Read	*TL* Chapter 7	
TLO July 31	Exs. 22-23	Serve *Their* Interests (2x)
TLO August 2	Ex. 24	Comments on Serve *Their* Interests (1x)
August 3 or 4		Meet with your trio for one hour (via video, voice, or in person) to coach on Exs. 22-23.
TLO August 8	Ex. 25	Reflections on Coaching: Serve *Their* Interests (1x)

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August 17 **Reflect and Grow**

Review course goals, results, peer feedback, and lessons learned. Generate ideas for sustaining your growth as a leader and for cultivating our learning community in the years ahead.

Read	*TL* Chapter 8	
Check-in	*TL* Chapter 8	
TLO August 13	Exs. 26-29	Reflect and Grow: Progress Report (6x)
TLO August 15	Ex. 30	Comments on Progress Report (1x)
August 21	TL Survey 2	

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