FULL REPORT WORKBOOK
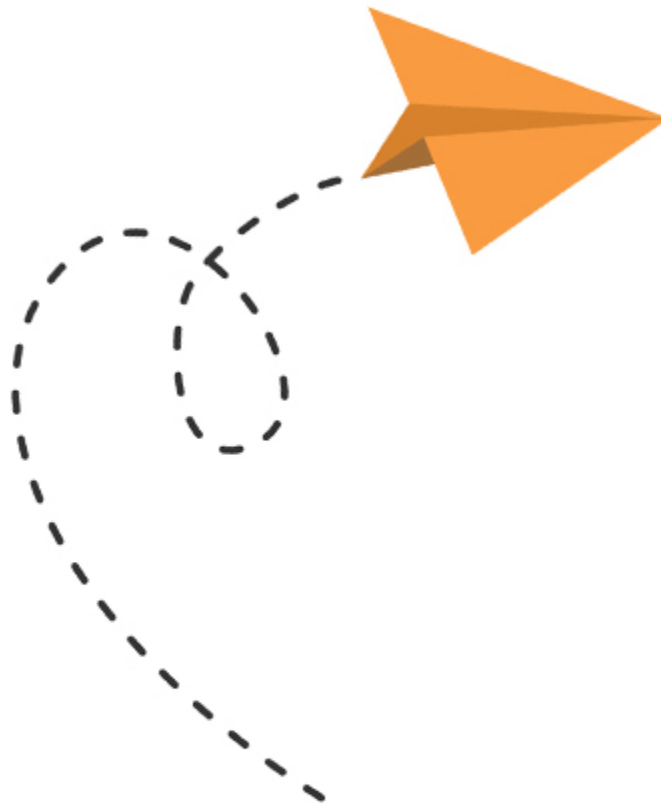
PROGRAM NAME: Sally Sample 2 Program

This Report Prepared For: Sally Sample

The Leadership Nexus Model

The Leadership Nexus is a unique way of looking at the foundational elements of leadership: thought and action. Each of these elements is essential, but they are distinctly different in function. In this model, the mental and emotional attention you expend during a workday is called Thought Time. Thought Time is a way of categorizing the internal processes you experience as you go about your work. It also describes your ability to navigate the complexities you encounter--complexities that change and increase as you move up and through the five levels. Focus Thought Time ineffectively or inappropriately and effective decision-making becomes very difficult.

The second component of The Leadership Nexus is action. Action Time is a description of what you are doing throughout the workday. Understanding where you are spending your time, what you are actually focusing your time on, is crucial to your effectiveness.

In this workbook you will find the results of your assessment, along with a breakdown of your responses for each level. Use these results to examine your personal score and to change it over time to more effectively reflect the demands of your position. We trust that you will find it to be a useful tool in the development of your leadership skills.

Using The Leadership Nexus

The Leadership Nexus workbook is designed to help you examine the personal leadership skills that are critical to success in nearly any working environment. There are two types of alignment that are key to getting the most out of The Leadership Nexus. The first is called the Thought/Action Alignment. It identifies how much time and energy you are currently spending on the leadership activities associated with each of the five leadership levels. Regardless of your position or role, this will help you better understand where you are focusing your time and energy.

The second is your Role Alignment and is found on Page 9. This report compares your leadership actions to the needs of each level of leadership and will help you identify the corresponding leadership skills necessary for ongoing success. Also included in this workbook are several activities that can help you strengthen your existing leadership skills and assist you in developing new ones. Please take some time to work through them.

One final thought. Like most assessments of this type, The Leadership Nexus is appropriately understood as a personal snapshot of your focus at the time you took it, so your Leadership Nexus score may or may not be different a month or a year from now. Use this workbook to help you grow in your leadership capacities today, and to help you continue your growth tomorrow and beyond.

Your Leadership Nexus Result

The red X on the horizontal axis of the model below is your Thought Time score. This score tracks the amount of time you spend thinking and making decisions. Scores toward the left indicate thoughts that are focused more on daily routine and situations that need immediate attention. Scores toward the right indicate thoughts that are more global or strategic.

Leadership Nexus Report for: Sally Sample
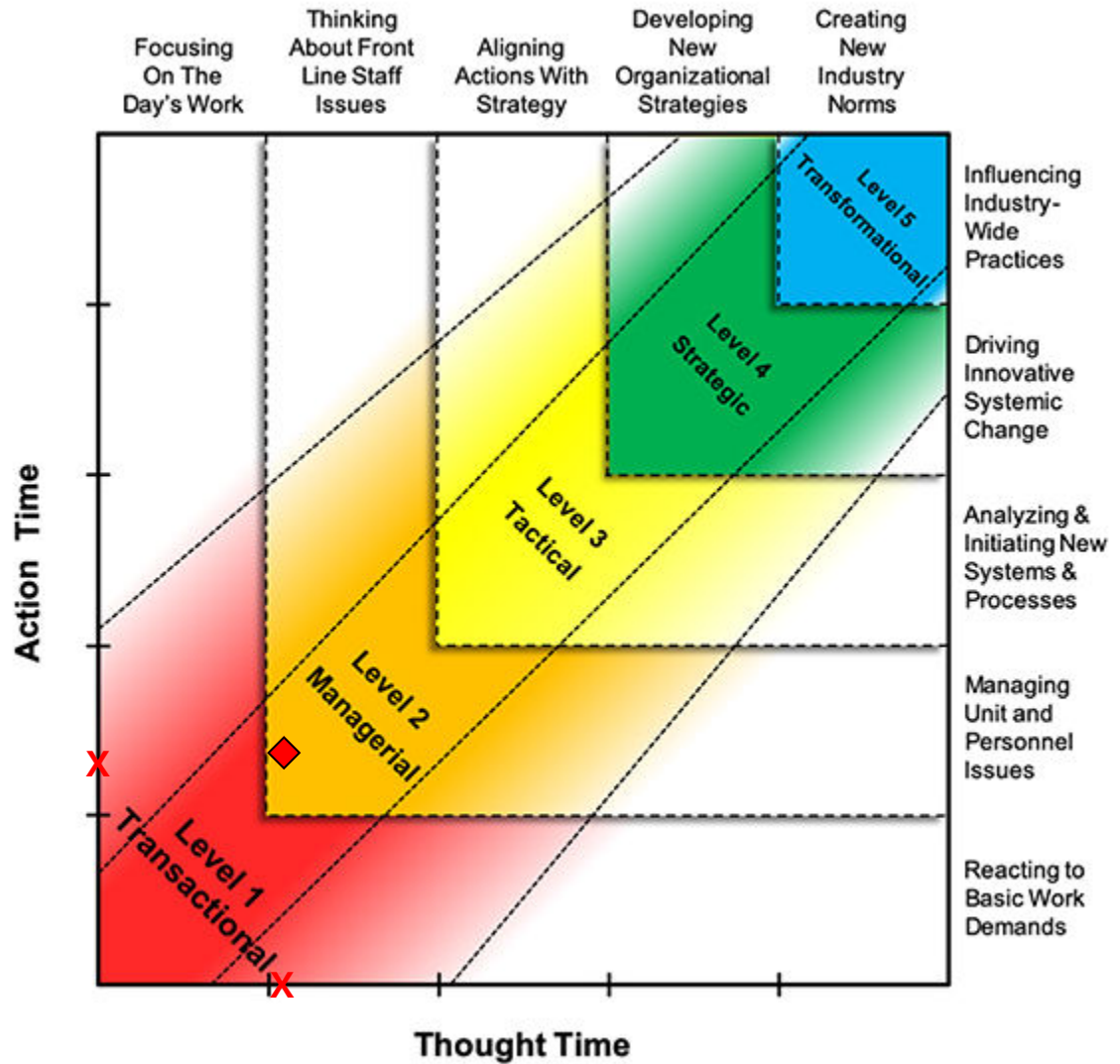
Explanation

The areas of solid color in the model indicate areas of alignment that are fairly strong and consistent. A score within these areas means that your thoughts and actions are aligned to a high degree. The more solid the color, the more closely aligned the scores.

A composite score that lands in the white area in the lower right of the model indicates a leader who is spending considerably more time thinking about higher levels but is spending less time acting on them. The risk of this lack of alignment is that it can cause the leader to look like a dreamer without a solid grounding in how to get things done.

A composite score that lands in the white area in the upper left of the model indicates a leader who is spending more time performing higher level activities, but not expending the thought time necessary to make them optimally effective. The risk here is that the leader is detached from a strategic focus and unable to connect actions with a vision of the future.

Understanding The Five Leadership Nexus Levels

Each of the five Leadership Nexus Levels is essential, so no single level is more important than another. However, to be a successful leader you must function at a level that is reflective of your position, education, and training. Aligning your Thought Time (the time you spend thinking about what is most important to you and to your organization) with your expenditure of Action Time (what you actually spend work time on) is critical to achieving goals and building a successful and satisfying career. In this section we will examine each of the five Leadership Nexus Levels, paying particular attention to the following areas:

Role
The function each Leadership Nexus Level plays within the organization.

Characteristics
Primary characteristics common to each Leadership Nexus Level.

Questions
Types of questions posed by successful individuals at each Leadership Nexus Level.

Strengthening This Level
What can be done to work more effectively at each Leadership Nexus Level.

Vulnerabilities
Where individuals are most exposed and vulnerable.

Negative Aspect
The negative side of each Leadership Nexus Level and what it looks like in the workplace.

Level 1: Transaction Leader

Role

Level 1 Transactional Leadership is where the most basic work gets done. Workers at this level perform concrete, routine, assigned tasks that often include emergencies that arise in the course of a day's work. The focus at this level is on getting the job done, so clear rules and procedures are essential.

Level 1 Transactional Leaders often don't see themselves as leaders and can sometimes be heard saying that they don't want to be leaders. They identify with their job and are oriented toward what needs to be done today.

Characteristics

- A strong focus on the daily demands of the job.
- Works hard to do the best job possible but is often unable to catch up.
- Constantly reacts to what is happening in the surrounding environment.
- New processes can be seen as threats to tradition and/or stability.
- Generally hesitant to take risks and prefers to retain procedures that have been successful in the past.

Questions

A Transactional leader tends to ask basic, fundamental questions that are focused on what needs to happen to get things done.

- What just happened? Why did it happen?
- Who caused this?
- Am I responsible for fixing it? If not, who is?
- Where am I going to get the tools necessary to take care of this issue?
- What is on the list for tomorrow?

Strengthening This Level

In order to become a more effective Transactional leader:

- Learn from your mistakes.
- Develop a mindset of excellence.
- Talk with teammates about the importance of rising to challenges.
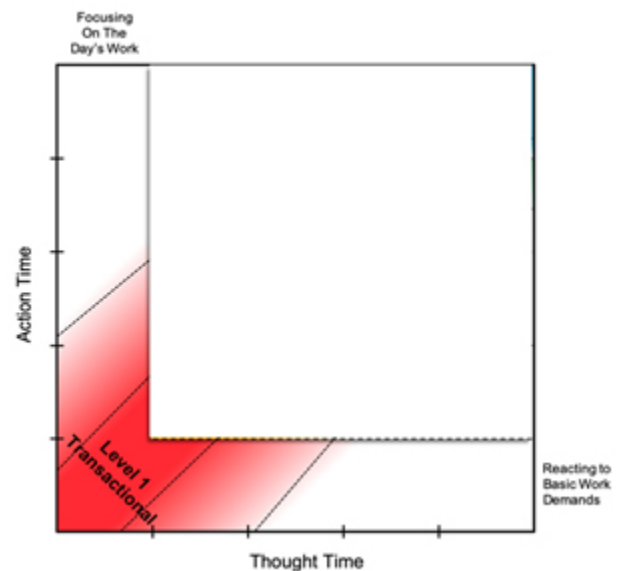
Strengthening (Cont.)

- Expand the risk of "visibility" - the willingness to be seen by higher-ups.
- Learn as much as you can about the "why's" of the policies and procedures under which you work.

Vulnerabilities

The greatest area of vulnerability for a Level 1 Transactional leader is making task mistakes. Maintaining effectiveness and keeping up with everyday work is essential, and the greatest exposure comes from a failure to accomplish these tasks in a timely and efficient manner.

Given the often-intense focus on routine, a Transactional leader can risk losing the incentive to learn new processes and the desire to make these tasks more effective over time.

Dysfunctional Leading

The negative side of Level 1 Transactional leadership is peer to peer intimidation. Intimidators are focused on getting what they need or want and will use power and control to bully and manipulate others. This is particularly damaging in the workplace because it destroys teamwork and camaraderie.

Examples of intimidation include:

- Using anger to influence a co-worker's behavior.
- Yelling at team members when something is not going right.
- Using personal power to change work assignments.
- Issuing threats toward a coworker who doesn't conform.

Level 2: Managerial Leader

Role

Level 2 Managerial Leaders are often in a first leadership position. Their primary role is to balance their daily work tasks with the supervision of staff. As a result, they often describe themselves as stretched between their own work responsibilities and the personal and professional demands of the team. Successful Level 2 leaders promote worker efficiency, high stability and low chaos. Level 2 leaders generally focus on short term, immediate responsibilities.

Characteristics

- Maintaining a balance between task and staff issues.
- Motivating staff to get work done efficiently and effectively.
- Developing relationships with staff without blurring boundaries.
- Know how to hold staff accountable.
- Ability to resolve conflicts with minimal side effects.

Questions

A Managerial leader, because of the need to focus on developing an effective team, asks questions that center on the team and its needs:

- What can I do to help you with this problem?
- What resources do you need?
- What do you need from me to help you?
- How can we prevent this next time?
- Are we staffed appropriately?
- Do we have the necessary budgetary support?

The best Managerial leaders pose questions that are directed at building team member confidence and capacity, recognizing that the success of the team ensures their own success.

Strengthening This Level

To become a more effective Managerial leader:

- Delegate more responsibilities to team members.
- Practice addressing conflict earlier and more directly.
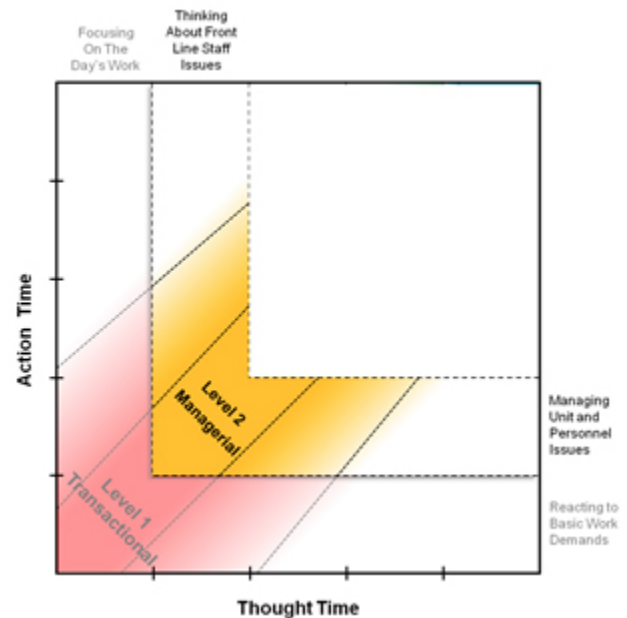
Strengthening This Level (Cont.)

- Hold team accountable without rescuing them from the consequences.
- Engage in conversation around strategy.
- Develop a more effective process for engaging and growing the team.

Vulnerabilities

The greatest vulnerability of a Managerial leader lies in ineffective teaming. Many first-time Managerial leaders are promoted because of their technical abilities, so their struggles often center around developing their teams and team members. Additionally, because they tend to lack budget experience, they have a higher risk of struggling to maintain an efficient department that uses its budgetary resources effectively. Adapting to a role that is different from that of team member and friend can make creating a clear set of boundaries and holding staff members accountable very difficult.

Dysfunctional Leading

When Level 2 Managerial leaders go negative, they can become Petty Dictators, individuals who rule a small kingdom, but with an iron fist. Petty Dictators are masters of control because they know what they want.

Examples of Petty Dictator behaviors include:

- Retaliation
- Threats
- Aggression
- Passive-aggressive behavior

Level 3: Tactical Leadership

Role

Level 3 Tactical Leaders work at the intersection of strategy and tactics. They understand the complexities of daily work and excel at evaluating process effectiveness. They often spend their time resolving systemic issues and implementing new unit or departmental initiatives, and they know where energies need to be focused. Tactical Leaders are often associated with middle management, functioning at the departmental level where both strategy and operations are daily realities.

Characteristics

- Comfortable with both operations and strategy.
- Manage short-term and long-term operations.
- Tend to be flexible and adaptable as they adjust to constant changes.
- Can get pulled into the weeds but tend to get out quickly.
- Good at holding individuals and teams accountable.

Questions

A Tactical leader focuses on process and asks broader, probing questions:

- Why did this problem happen in the first place?
- What can we change to avoid a recurrence?
- How does this solution align with our overall strategic direction?
- What can we do to strengthen our efficiency?
- Is it possible for us to work in new ways that eliminate waste or ineffectiveness?

The questions that effective Tactical leader questions ask are designed to shift team members from the present to the future: from short-term problem-solving to longer-term strategic change.

Strengthening This Level

To become a more effective Tactical leader:

- Challenge your personal creativity.
- Get involved in more strategic conversations.
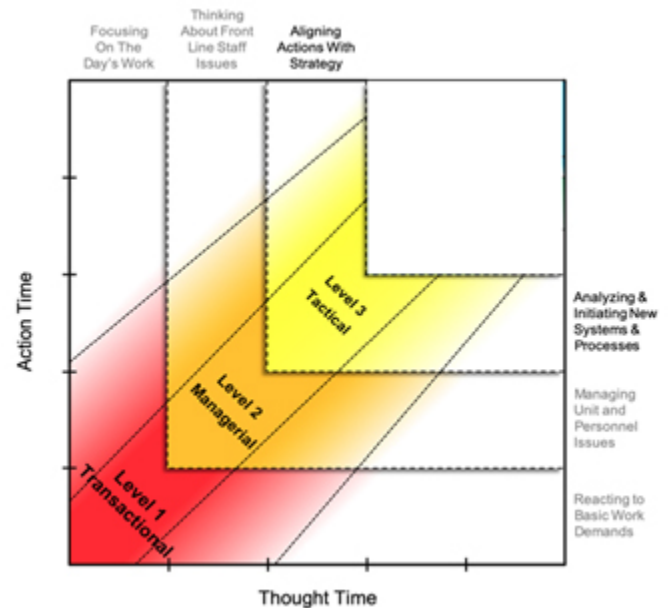
Strengthening This Level (Cont.)

- Ask for opportunities to lead broader projects.
- Avoid the weeds, and hand off solutions to others.
- Expand the types of committees and projects on which you work.

Vulnerabilities

A Level 3 Tactical leader is responsible for larger groups of staff and the procedures that define their work. They are most vulnerable to a lack of adaptability, creativity or confidence in adjusting and implementing the procedures. Those who have achieved success through superior task performance may find these more expansive responsibilities difficult to navigate. Another vulnerability for a Tactical leader lies in their ability identify and implement strategic vision. Without this ability it is easy to lose sight of the department's direction and how that direction is going to be achieved. The success of a Level 3 Tactical leader rests in consistent challenging and strengthening their strategic skills.

Dysfunctional Leading

Tyrants are constantly looking for ways to expand and maintain the power they have accumulated.

Examples of these behaviors include:

- Intimidation
- Veiled threats
- Aggressive confrontations

Level 4: Strategic Leadership

Role

Level 4 Strategic leaders create a vision for their team and an understanding of the actions needed to reach it. Level 4 leaders need a high tolerance for risk and spend quite a bit of time talking, meeting, and planning before actually putting strategies into action. They have an ability to look into the future and can articulate an overarching strategy to implement and achieve long-range goals.

Characteristics

- Spend most of their time in strategic development.
- Think long-term and rarely get into the weeds.
- Build structures that enable effective task delegation.
- Develop strong relationships to facilitate creative problem-solving.
- Comfortable with conflict and use it positively.
- Adaptable, creative thinkers and systemic actors.

Questions

A Strategic leader asks questions that focus on creating a strategic direction.

- If we re-think our approach, what would we do differently?
- If we implement a solution, what are the effects?
- How can we realign operations to achieve future strategic goals?
- How can we positively influence other leaders within the organization?
- What initiatives should we undertake to achieve organizational goals?

Questions like these anchor team members actions within the framework of the larger strategic vision.

Strengthening This Level

To become a more effective Strategic leader:

- Enhance the ability to see the big picture: spend time with strategic thinkers.
- Confront internal barriers to delegation and conflict resolution.
- Spend time outside of the organization, learn where the industry is headed.
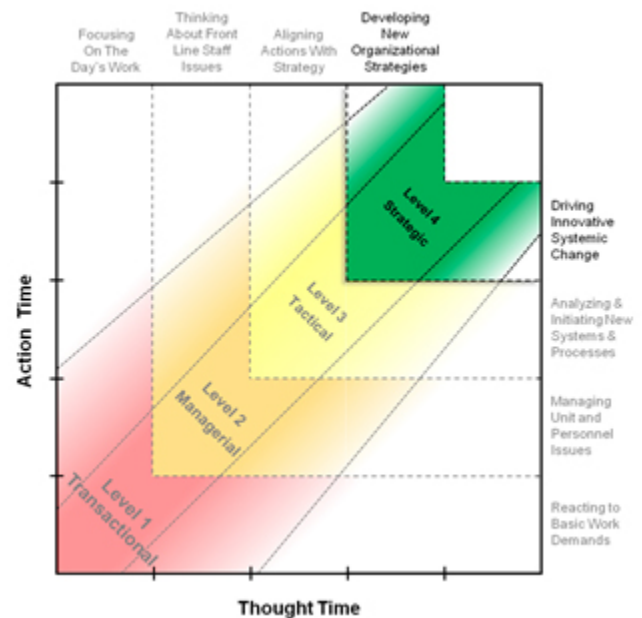
Strengthening This Level (cont.)

- Expand your participation in industry conferences.
- Develop and nurture stronger relationships within the organization.

Vulnerabilities

A Level 4 Strategic leader is deeply committed to the long-term development of the organization. If this vision is incorrect, the result ca be organizational failure. Given the scale of decision-making at this lev a Strategic leader must have the courage to act, often with a lack of full information. The ability of a Level 4 leader to develop and nurture strong relationships is also essential for successful strategic implementation.

Dysfunctional Leading

A negative Level 4 Strategic leader is a Despot. Despots refine their ability to achieve high levels of success through the unencumbered and unrestrained use of power. They are very successful at clearing potential rivals to succeed at the expense of their employees and their companies

Examples of Despot behaviors include:

- Creating a dog-eat-dog environment.
- Ruthlessness.
- No tolerance for mistakes.
- Promotion of those who support decisions without question.

Level 5: Transformational Leadership

Role

Level 5 Transformational Leaders spend a great deal of time working to change the very nature of the organization. They immerse themselves in their vision and work with those in the vanguard of these changes. They are highly energized, rarely take no for an answer, and are always looking for a better, more elegant solution. They develop relationships across intellectual and organizational boundaries, feeding themselves with new insights, inventions, and initiatives.

Characteristics

- Relentless change agents hungry for information.
- See a future that few others can see.
- Desire to radically change their part of the world.
- Recognize new developments in industry and its impacts.
- Accept failure: it is just another step toward success.
- Enjoy breaking things that are not broken and assembling in new, unique ways.

Questions

A Transformational leader asks questions that create a disruptive strategic direction.

- Is there another approach to solve more than one problem at a time?
- Why are we doing this work in the same way it has been done for years?
- How can we use emerging technologies in our company/industry?
- What can we break to create new processes?
- Do you see my vision, where it directs, will you go there with me?
- Who do we not know that we need to get to know?

The most effective Transformational leader questions challenge those around them to move into dramatically new ways of thinking and working.

Strengthening This Level

To become a more effective Transformational leader:

- Intentionally seek out and embrace changes in various areas of your life.
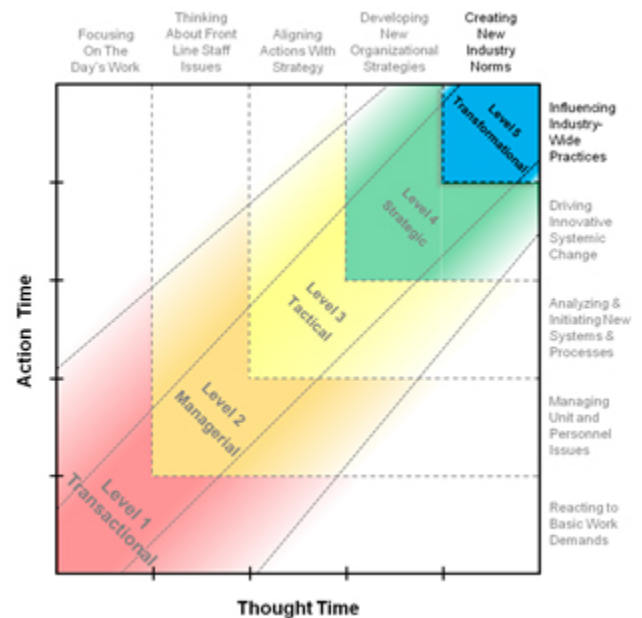
Strengthening This Level (Cont.)

- Find knowledgeable individuals in unrelated areas and talk with them.
- Explore activities that force you to use your creativity.
- Keep a journal, track technologies and people that are interesting.

Vulnerabilities

The greatest vulnerability of a Transformational leader is a failure of creativity. Failure of initiatives is fine, just change directions. Failure of processes is okay, create new ones. But a failure of creativity can lead to catastrophe. Being a Transformational leader also means having a comfort level with risk-taking. Spectacular failures can be the result, but the drive to move toward a new future is more powerful than the risk of failure.

Dysfunctional Leading

A negative Transformational leader is a Megalomaniac, an intensely charismatic individual who can seize the spotlight at will to bend the world to their desires. Because of their ability to use the system to their advantage, they are able to move large numbers of people in their direction, even when that direction is destructive.

Examples of Megalomaniac behaviors include:

- No sense of right or wrong, only what works for them individually.
- Revenge on perceived enemies.
- Intense focus on their vision of reality regardless of situational facts.

Leadership Moments

Leadership is not a quality, nor is it a single event. As we see it, leadership is the ability to recognize those moments when we have the opportunity to act in a way that positively affects the needs of the people and situations around us. Each new day presents multiple opportunities for these moments, many of them seemingly insignificant, a few that are larger, and just a few that are truly critical. Recognizing these opportunities and acting on them in appropriate, helpful ways is what makes a great leader.

These opportunities are what we call Leadership Moments. Leadership Moments are decision points, the moments in the course of a day when you can choose to dive back into that all too familiar fire-fighting mode, or struggle to try something different. Leadership Moments are those times when a leader functions in a manner that:

- most effectively helps resolve an immediate situation,
- assists the team members in their personal and professional growth; and,
- advances the needs of the team and the organization.

It isn't necessary for a good leader to spot every one of these Leadership Moments. It IS important to be alert and to recognize enough of these moments to impact the team and the organization in the most positive direction possible. In short, it is WHAT a leader does with these moments that determines his/her effectiveness. Effective Leadership Moments are characterized by a conscious set of thoughts that trigger a deliberate set of actions.

Changing your everyday thought processes has a direct impact on performance. Try keeping track of your thoughts throughout the day and see what you would like to change. Given that a normal human being has somewhere around 6,000 thoughts per day, there are plenty of opportunities to take advantage of even a small percentage of them. As you practice new actions, you will discover that a new sense of accomplishment accompanies your improving skills. This is what leads to substantive change.

What Does Your Leadership Nexus Score Mean?

Your Leadership Nexus score is a snapshot of how you perceived your thought and action time expenditures at the time you took the assessment. As such, it will provide you with a picture of your current level of thought and action. It is important to remember that this level is not right or wrong, or good or bad. It is simply a measure of your effectiveness in your role at this time.

In the following section, we will dive more deeply into what your score means for you in your current role and what you can do to change it if will help you in your journey to more effective leadership.

Leadership Nexus Role Alignment: Sally Sample

You selected **Director** as your role.
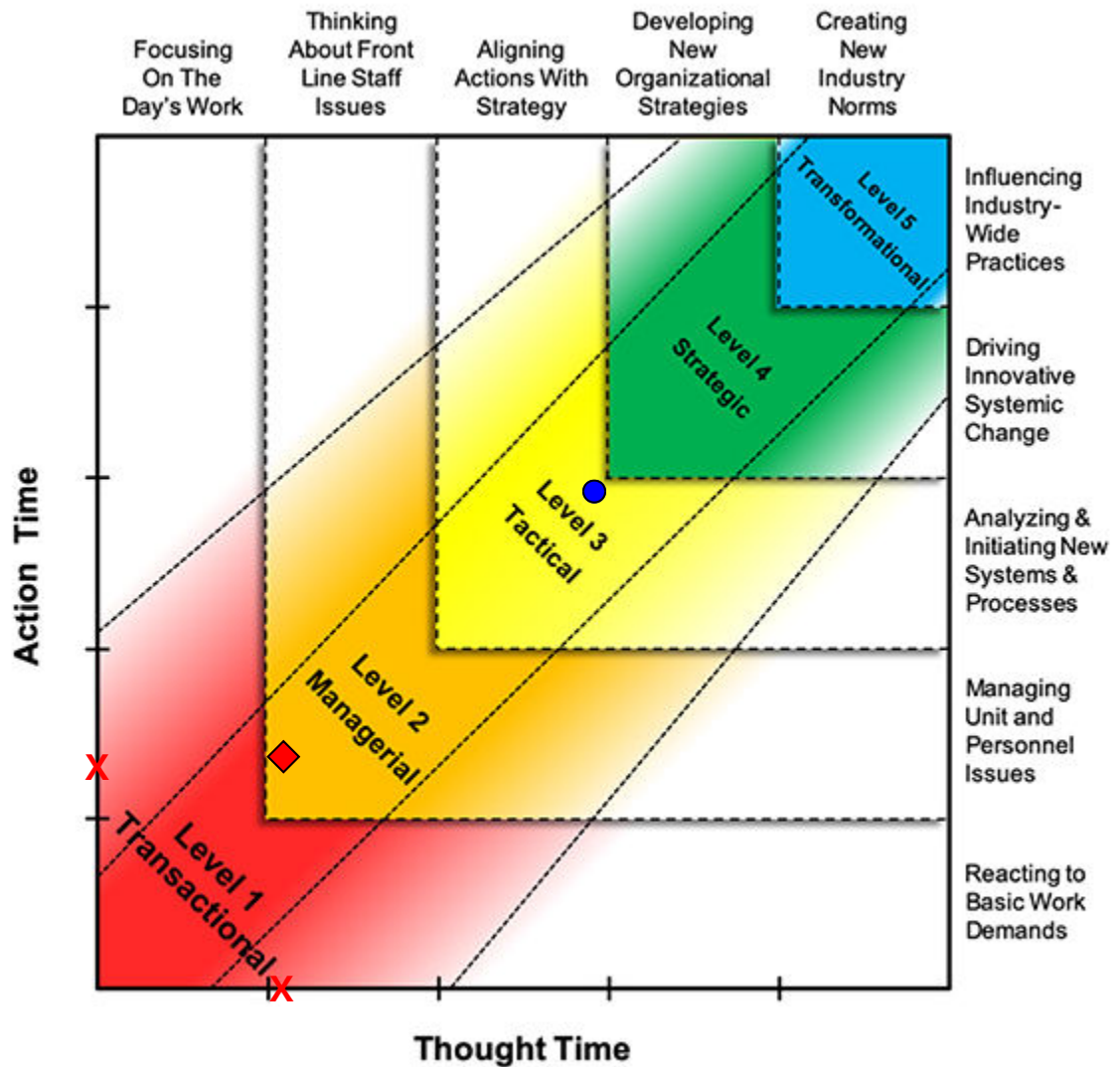
ROLE ALIGNMENT Report Explanation

The Leadership Nexus Role Alignment Report is an examination of your current Leadership Nexus level in relationship to the typical score of individuals who are in similar roles. This will provide you with the opportunity to discover for yourself whether your current thoughts and actions are in sync with the needs of your particular position.

Why is this valuable? Because reflecting on how your leadership syncs up with the needs of your role gives you a different way of measuring your effectiveness. Successful leaders tend to lead with a style that is most easily followed by the team. But, in addition to their style, they also provide the elements of leadership that will most effectively help their team members do their work.

Micromanagement is a perfect example of this. A leader can be empathetic, connected, collaborative, and knowledgeable. But if this same leader consistently dives down into the direct reports' work and does not provide them with enough space to function on their own, he/she can have a powerful negative impact on the team. Wonderful style, but ineffective leadership.

COMPLEXITY AND SCOPE

Capacity For Complexity
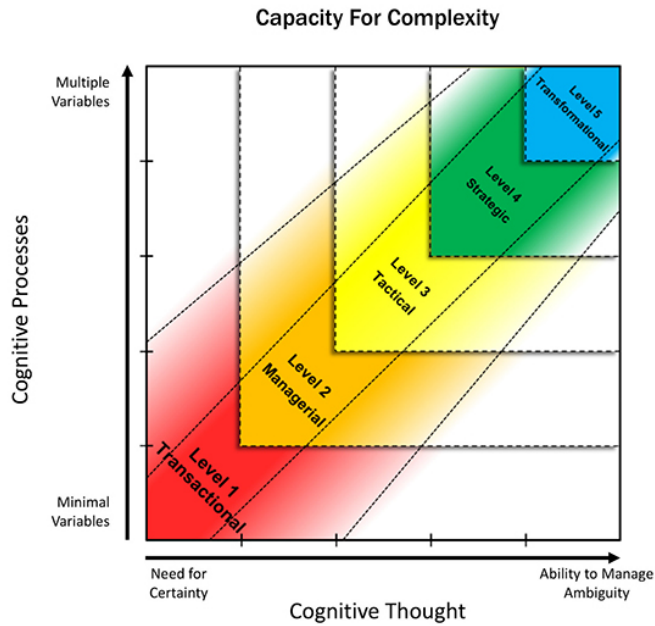
Success in a new role requires growth on two fronts: internal and external. The internal ability to acquire and to process large amounts of new information is called Capacity for Complexity. A new leader must dedicate significant amounts of time to learning new tasks, processes, and procedures, which means less time available to focus on the tasks from a previous position. As a leader moves up in level, the complexity of this new information rises as well.

Scope is the external area of growth. As an individual moves up in level, the scope of their job changes, increasing in both the number of people reporting to them and in the time frame of their projects and/or responsibilities. The more people a leader oversees and the longer the time frame of their projects, the larger and more complicated their scope. Leadership success is dependent upon the ability to manage increasing layers of complexity while simultaneously dealing with greater scope.

VULNERABILITY AND RISK

Vulnerability and Risk
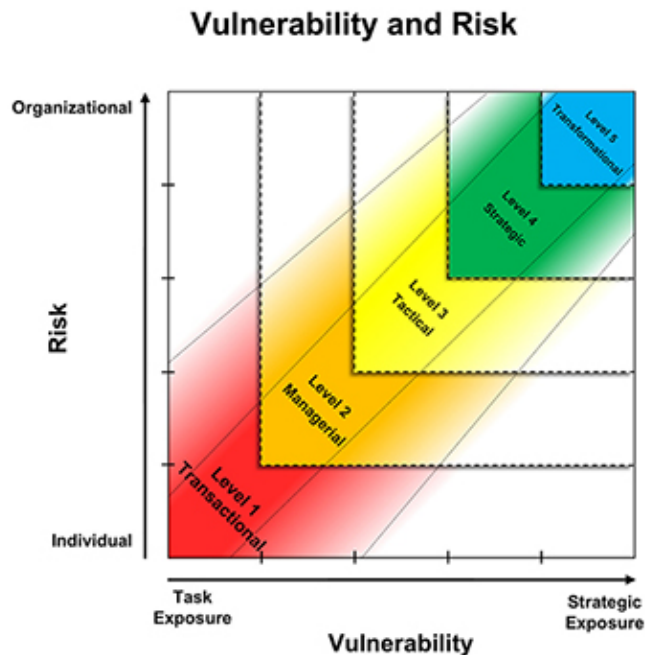
Recognizing and respecting the interplay of vulnerability and risk is another key leadership trait. Successful leaders understand this balance and recognize how it shifts as their role changes.

Vulnerability is an internal state that reflects an individual's susceptibility to harm and their ability to cope with perceived threats. At the lower leadership levels, vulnerability is generally connected to personal exposure. The more visible the individual, the greater the possibility of a higher-up noticing a mistake, potentially resulting in loss of job. At the higher levels, leaders feel vulnerable when they reach their capacity to grow strategically and struggle to adapt to increasing levels of complexity.

Risk is the potential for damage or loss resulting from external threats. In a professional setting, these external threats can be as basic as the introduction of a new set of tasks or as complex as rapidly changing developments in technology that threaten the very existence of the company. The ability to manage these risks must grow if a leader is to succeed at higher levels. At the Transactional and Managerial levels, risk lies in task performance. Too many task mistakes equal loss of job. At higher levels, risk lies in strategic competencies and the ability to work unsupervised on long-term projects with significant scope. An inability to develop strategic abilities or to maintain focus over time equals loss of job.

Use this section of the Leadership Nexus Workbook to examine how your Leadership Nexus level aligns with the level that is most reflective of leaders with similar roles and positions.

My Leadership Nexus Level (the red diamond)

_____

_____

_____

Level For Positions Similar to Mine (the blue dot)

_____

_____

_____

Which of the following three possibilities best reflects your score in relationship to the general position score of your role:

_____ **My Leadership Nexus Score Falls Above the General Position Score**

If your Leadership Nexus Score falls above the general level of the position in which you are working, it means that your thoughts and/or actions are functioning at a higher level of leadership than is normally required for this position. This is a good thing as long as the team is receiving what it needs in order to function effectively. It is not so good if the team is not receiving what it needs.

A leader operating at a higher level can, if doing this wisely, be an inspiration to the team and provide creative approaches to change and process. A leader who is not attentive to this, however, can appear to be abandoning their team or may be unable to provide the team with what it actually needs. Use the following pages to explore some tactics that you can use to stimulate these new approaches.

_____ **My Leadership Nexus Score is About the Same as the General Position Score**

If your Leadership Nexus Score comes in at roughly the same level as the position in which you are working, it means that your thoughts and/or actions are generally in synch with the needs of your position. Ideally, this means that you are providing the team with an appropriate amount of challenge as well as enough space for them to grow in their own professional abilities. The leader's personal work in this scenario is to continue developing additional leadership skills that will enable them to challenge their team members' growth and encourage them to work at increasing levels of skill and sophistication over time. You may find the following pages useful in stimulating your own growth process as your experience grows and your career goals change.

_____ **My Leadership Nexus Score Falls Below the General Position Score**

If your Leadership Nexus Score falls below the general level of the position in which you are working, it means that your thoughts and/or actions have probably remained at a level that is similar to your previous position as a leader. Most of us tend to feel comfortable continuing to do the things that made us successful. So it is not unusual for a leader to bring with them the leadership skills that got them promoted. And that can be true even if though the new job actually requires a different set of skills.

If your Leadership Nexus score falls below the general score for someone in your position, use the next two pages to stimulate ideas that will help you rise to the level that is most appropriate for your job. We have listed a series of suggestions that have worked for many leaders who have successfully changed their thoughts and actions. Try a few of them, but also use your own creativity to identify additional areas of change to your thoughts and actions.

Moving From

Transactional Level	Managerial Level
Do Less	**Do More**

Transactional Level
Do Less

- Hanging out with your coworkers.
- Solving problems that team members bring to you.
- Serving as the team "Answer Man" by answsering all of the team's questions.
- Doing less of the work your coworkers should be doing, even though you can do them better.
- Getting immersed in day-to-day controversies or conflicts.

Managerial Level
Do More

- Building your team's capacity to solve problems.
- Challenging staff to bring answers to their own questions.
- Looking for new challenges to take on, even when you are busy.
- Taking a proactive stance on problems within the team.

Action Steps

In the space below identify areas of change that you will commit to trying. As you successfully achieve the first ones, move on to the others. Remember that the goal is to maximize the use of your natural skills and to add to them by practicing the skills necessary for advancement to the level of leadership that you desire.

_____

Action Item #1

_____

Action Item #2

_____

Action Item #3

Moving From

Managerial Level

Do Less

- Handling daily team tasks.
- Solving team or personal problems.
- Answering staff questions.
- Challenging your team to examine existing policies and procedures.
- Focusing on actual work issues and processes.
- Challenging your team to find creative solutions to problems.
- Managing team behaviors. Operating as a "fire fighter."

Tactical Level

Do More

- Expanding committee participation to include areas outside of your primary expertise.
- Creating opportunities to talk about longer-term strategies with your one·up.
- Looking for opportunities to strengthen your creative abilities, both personally and professionally.

Action Steps

_____

Action Item #1

_____

Action Item #2

_____

Action Item #3

Moving From

Tactical Level

Do Less

- Handling the detail work.
- The work of your team.
- Resolving team conflicts.
- Do less operational tasks.
- Spending time solving problems that other team members can manage.

Strategic Level

Do More

- Handing off more of the detail work to direct reports.
- Growing direct reports capacities by challenging them to learn more and take on more.
- Setting aside time to think about longer-term strategy unencumbered by daily tasks.
- Getting out of the weeds as quickly as possible and asking for updates.
- Exploring higher-level relationships inside the organization.

Action Steps

_____

Action Item #1

_____

Action Item #2

_____

Action Item #3

Moving From

Strategic Level

Do Less

- Handling any problems that could be handled by someone else.
- Getting into any of the weeds of the organization.
- Attending meetings that are operational in nature unless absolutely necessary.
- Meeting with the same people week after week.

Transformational Level

Do More

- Reading as much as possible about anything in order to expand your internal boundaries and to stretch beyond your comfort zone.
- Expanding your imagination by intentionally placing yourself in uncomfortable situations.
- Talking with innovators in other industries to learn how their worlds could potentially impact yours.
- Getting involved in forward-thinking organizations that challenge your existing view of the world.

Action Steps

_____

Action Item #1

_____

Action Item #2

_____

Action Item #3

For further information, please feel free to contact us at: mwarrick@jamessonsolutions.com

or find us online at: www.jamessonsolutions.com