Formula 4 Leadership

Highfield House
124 Derby Road
Long Eaton
Nottingham
NG10 4LS
Tel: 0115 973 4888
Fax: 0115 973 1009
www.formula4leadership.com

The
Coach
on
the
Desktop   (CotD)

PERSONAL DEVELOPMENT PROGRAMME

What You Have Bought

Thank you for purchasing the Formula Leadership's Coach on the Desktop (CotD) Personal Development Programme. It is a unique tool for strengthening your leadership decision making capability. It will help you develop:

- Your leadership judgement – knowing when and when not to use which leadership style.

- Your leadership styles – how to use the four key styles of leadership decision making.

The Program consists of the following elements:

1. This guide to help you use the on-line Coach on the Desktop

2. Access to Coach on the Desktop.

You have purchased three months unlimited use of this unique tool. It will allow you to assess any situation where you have leadership and predict what style represents the best likelihood of success.

This guide contains full instructions for its use.

What are the key features of CotD?

The CotD is accessible 24 hours a day. You can use it as many times as you wish for three months, even on your smart-phone if you wish. You can extend your use of CotD by 'phoning our offices and paying an additional fee.

Using CotD is simple. Each page tells you exactly what to do. CotD allows you to think about up and coming decisions with colleagues as well as past events that you want to analyse. It asks you up to ten key questions then helpfully makes recommendations about the 'best' way to engage with reporting colleagues based upon your answers.
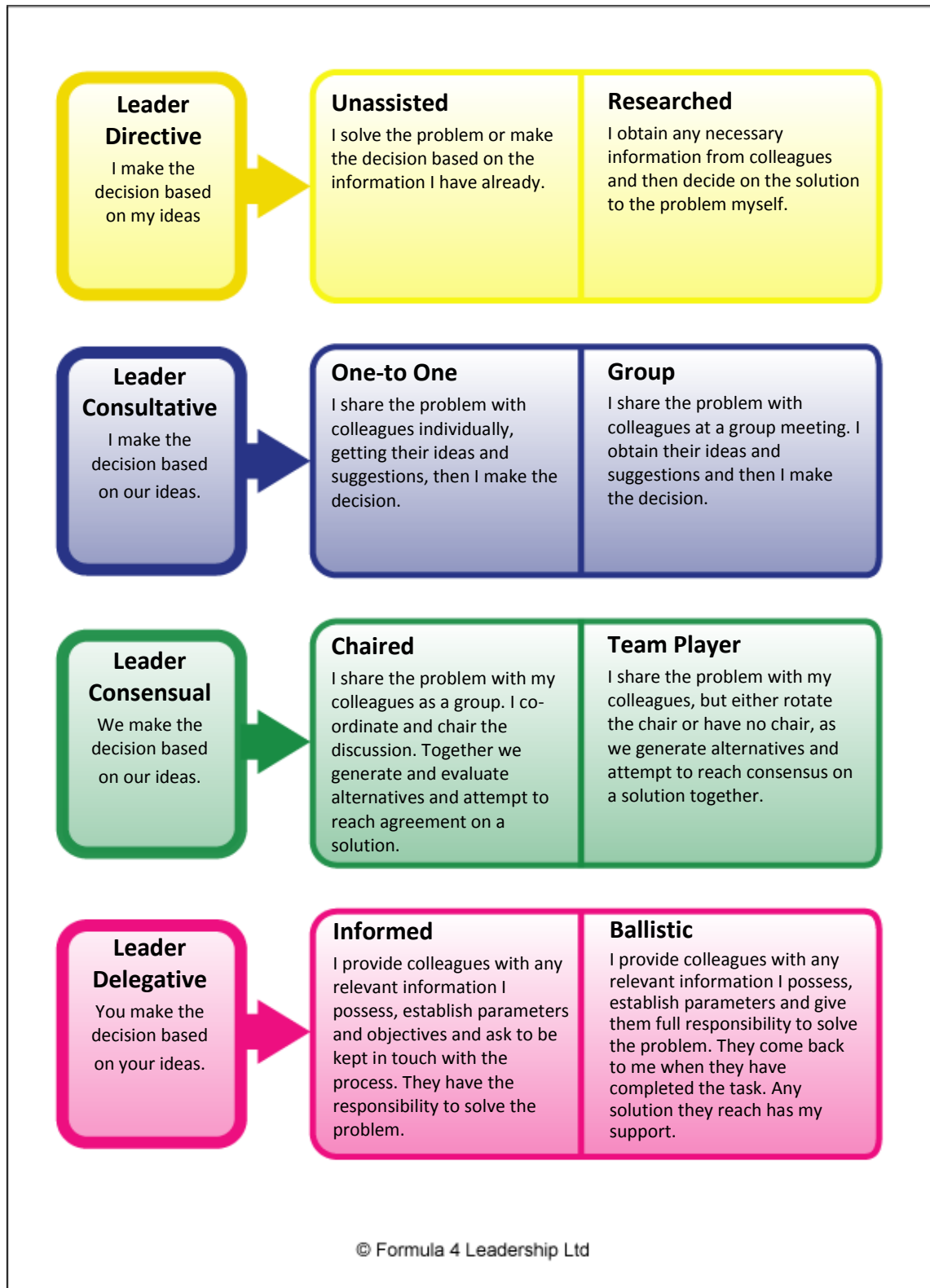
It does not take away your freedom to make decisions yourself; instead, it makes you think about possibly better ways of working with and through colleagues.

Each time the CotD is used a report is generated that describes your thinking and the advice CotD offers. This can be shared with others so they understand why you are taking the recommended approach. Moreover, the software keeps a history of what you do so you can always go back and analyse why things went well or not so well. You might also want to share this with other people so that you can get their input into your thinking.

CotD can be helpful for some people if they use it with a trained leadership coach. There is some more information about this later in this guide.

The Decision Making Model

When you use CotD it will advise you to use one of the following styles:

Leader Directive — I make the decision based on my ideas	**Unassisted** — I solve the problem or make the decision based on the information I have already.	**Researched** — I obtain any necessary information from colleagues and then decide on the solution to the problem myself.
Leader Consultative — I make the decision based on our ideas.	**One-to One** — I share the problem with colleagues individually, getting their ideas and suggestions, then I make the decision.	**Group** — I share the problem with colleagues at a group meeting. I obtain their ideas and suggestions and then I make the decision.
Leader Consensual — We make the decision based on our ideas.	**Chaired** — I share the problem with my colleagues as a group. I co-ordinate and chair the discussion. Together we generate and evaluate alternatives and attempt to reach agreement on a solution.	**Team Player** — I share the problem with my colleagues, but either rotate the chair or have no chair, as we generate alternatives and attempt to reach consensus on a solution together.
Leader Delegative — You make the decision based on your ideas.	**Informed** — I provide colleagues with any relevant information I possess, establish parameters and objectives and ask to be kept in touch with the process. They have the responsibility to solve the problem.	**Ballistic** — I provide colleagues with any relevant information I possess, establish parameters and give them full responsibility to solve the problem. They come back to me when they have completed the task. Any solution they reach has my support.

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The CotD will also explain how to use the style. You can print off two types of report that will help you with this.

Tenets of Formula 4 Leadership

When thinking about these styles it is important for you to know that Formula 4 Leadership maintain the following:

- No one leadership style is universally applicable to all decision making situations.
- No one leadership style is inherently better than any other.
- Effective leaders gear their style to the nature of the task and the characteristics of the people involved.
- Each decision-making situation can be methodically assessed to determine the most appropriate leadership style.
- Effective leadership involves a preparedness to adopt different styles of decision making.
- Situational analysis, to determine the most appropriate leadership style, can be learned.
- The key competencies, which underpin effective leadership, can be developed.

It is intended that you can draw strength from these 'truths' that are underpin this approach. They are core beliefs that you can communicate to others when you help them begin to grow and develop their leadership skills as you become a role model to others.

Getting Started

You will have separately received an email which says:

You have been invited to use the Formula 4 Leadership Coach on the Desktop (CotD) by *(Name of the person who invited you)*.

   1. To start using the CotD, please go to the Web Site URL of
http://coach.formula4leadership.com
   2. Your User Name is: xformula4-0037
   3. Your case sensitive password is: 4d120409

Please then follow the instructions on the web site to complete the CotD.

If you have any further questions about completing the CotD, please contact the person who invited you (also CC'd on this message).

If you have any difficulties at this point, which is most unlikely, telephone our offices during normal office hours on the number given above.

How to use CotD

Over a period of about three weeks, deliberately use CotD at least once per day to analyse real leadership decisions that are facing you. Try to make these as random as possible and not just ones that are important to you.

Think carefully about the situational questions that CotD poses. Consider the outcomes. Are the leadership styles recommended the ones you would instinctively use – if not, are they worth trying?   You will find that the software invites you to evaluate the advice given; make sure you do this every time.

Reflect upon the **Principles of Formula 4 Leadership** and see how they guide the recommended leadership style. Put into practice the guidance that you will find in the Full Report about how to implement the recommended style.

The Principles of Formula 4 Leadership

CotD is based upon a set of principles. They are given here. Check that you agree with them all; if not, be clear about why. The advice given in CotD is based upon these principles. The aim is that by using CotD they will become second nature to you.

The idea behind these principles is that they will focus your time and energy to achieve optimal results. They are based upon the idea that effective leaders:

- always consider how important the decision is;
- see if the decision offers a development opportunity for their team;
- ensure that important decisions are worked on by the best-qualified people;
- stay personally close to important decisions which are unfamiliar in nature;
- seek to establish mutual interest so that subordinates share the same goals as those of the organisation;
- involve subordinates in decision making whenever their commitment is uncertain yet required;
- involve teams to improve the technical quality of decisions when breadth of information and multiple perspectives are called for;
- use appropriate individuals to improve the technical quality of decisions when intricate, sequential reasoning is required;
- evaluate their performance against these Principles in the short, medium and long term.

Keep these Principles in mind when you answer the questions in CotD.

The Situational Judgement Questions

As you go through the CotD you will be asked up to ten questions. Try to see the link between these and the Principles above. These questions are a form of 'decision tree'. By answering them you are taken to one of the styles given in the model above.

You will find that five of the questions are about the situation and the other five about the people in the situation. They are given here along with more detail about them. You will find this detail if you click on the 'Explain' button.

About the TASK

Is this a really important decision?

Is getting this right or wrong going to have an impact on personal, team or the organisation's goals? Is it important to the organisation which solution is adopted? Could the decision make say, a 5% difference to performance?

Does this decision need to be made immediately?

Do you feel there is time urgency? Is it imperative that you 'strike while the iron is hot'? Will the chances of success, or the efficient use of people or other

resources be materially affected by a reasonable delay?

Do you know enough to handle this on your own?

Do you have sufficient information and the necessary expertise to make a sufficiently high-quality decision?

Does this need the views of a group of people?

Does the task need to be worked on through group discussion so that breadth of information and multiple perspectives are obtained and considered? An alternative is that this is a task of an intricate and sequential nature which would be better worked on through individual analysis – in which case the answer here is "NO".

Have you worked successfully on this type of problem before?

Are you clear about what you want and where you are going? Have you a good idea about what needs to be done in order to get there? Can you readily set clear targets?

About the PEOPLE

Is this a good opportunity to develop your team?

Does the task readily offer the opportunity to 'add value' by developing the skills, talents or confidence of subordinates? Is this a good opportunity to develop your relationship with your colleagues?

Will the team readily follow your decision?

Are you reasonably certain that the decision can be effectively implemented even if the subordinate(s) have not been collaboratively involved in the decision-making process? Could necessary levels of motivation and performance be maintained even if you make the decision yourself?

Could the team sort this out on their own?

Do subordinates have sufficient information, expertise, confidence and maturity to make a high-quality decision?

Can you trust the team to do what's best?

Can you trust your subordinates to pursue the best and most rational solution, rather than be unduly influenced by their own self-interest? Do subordinates share the organisational goals to be obtained in solving this particular problem?

Is there going to be quite a lot of disagreement about this?

Is conflict among subordinates over preferred solutions likely? Is there likely to be substantial disagreement between you over which course to pursue? Is the decision controversial and likely to evoke very different views?

Consideration of your Leadership Practice

Having used the CotD at least fifteen times, print off the Full Report. First of all focus on the personal history section. Consider the outcomes (ie leadership styles) you have reached through the CotD.

- Are they similar to, or different from, what you might have expected before you began?

- Do you think they differ from what other people know and expect from you?
- Do you draw any learning or insight from the pattern of outcomes?

Next, focus upon the pattern of responses to the individual questions. Each of these questions is related to a specific Formula 4 Leadership competency. Highlight any questions where you have shown a marked preference (say more than 65%) for answering in only one way. Consider whether you should use the Formula 4 Leadership Competency Development Planner below.

The Ten Competencies Relevant To Leadership Development

The full list of ten competencies is given here. You can find them when you click on the 'Explain' button and they are also given in the reports you can print off. They are given here in full detail. Use the descriptions below to devise your personal development plan. Remember, the 'rightness' or 'wrongness' of your Yes-No responses through the CotD depend upon these competencies.

Task Orientated Competencies

Impact Judgement
The ability to discern how important it is which solution or decision is adopted; can accurately judge the impact of adopting one course of action over another; can tell how important a decision is in reaching personal, team or organisational targets; can gauge the extent a solution will affect performance.

Time Utilisation
The ability to use people and time efficiently to solve the problem or reach a solution; able to take quick and effective action in a critical moment or crisis; can 'strike while the iron is hot'.

Data Rationality
Able to judge whether they personally have sufficient information and expertise to make a high-quality decision; able to gauge the extent of their own knowledge, skills and experience in reaching a decision.

Task Appraisal
The ability to judge whether a task needs the breadth of analysis and multiple perspectives provided by group discussion; able to identify whether a decision requires a synergistic solution, or whether it requires the intricate, sequential reasoning optimally provided through individual analysis.

Problem Structuring
The ability to define a situation according to its current state and desired state, along with knowledge of the methods for transforming the former into the latter; clear about what is wanted and the way ahead; can adequately define what the problem is and what needs to be done to solve it; can set short, medium and long-term targets.

People Orientated Competencies

Developing Subordinates
The ability to appraise and facilitate the development of colleagues (and hence the relationship with them); knows when to 'add value' by developing the

skills, talents or confidence of team members; genuinely interested and motivated by creating opportunities for developing the managerial and technical skills of colleagues.

Gauging And Gaining Commitment
The ability to gauge colleague commitment or the likelihood of acceptance of decisions or solutions; additionally, the ability to use appropriate bases of power and decision-making processes to gain colleague commitment or acceptance of a decision; can do this in such a way that motivation and performance levels can be increased or maintained.

Subordinate Appraisal
The ability to weigh whether colleagues have sufficient information, expertise, confidence and maturity to make a high-quality decision; knows which colleagues to involve in working on which solutions; can judge colleague readiness.

Establishing Mutual Interest
The ability to find win-win formulas where colleagues feel they share the same goals as organisation; knows in what circumstances to trust colleagues to pursue the best and most rational solution rather than just look after their own self-interest.

Diffusing Conflict
The ability to resolve disagreement with and between colleagues over differing solutions to the problem; can predict when dispute is likely; effective at conflict resolution and settling arguments amicably.

Types of Decision You have Chosen

Your responses may, of course, be influenced by the type of situations for which you have used the CotD. If you have only used it to consider significant decisions, it would not be unusual if you had said "Yes" in most cases when answering the question "Is this a really important decision"? This effect should have been minimised by the way you have used the CotD deliberately for a random set of decisions. As you continue to use the CotD do make sure that you bring variety into the types of decision you choose.

What other opportunities are there?

You are recommended to make full use of the Cotd until the situational questions become second nature and you find yourself thinking about them almost automatically.

To help support your progress, and to benchmark your progress, you should also consider the following opportunities that are available from Formula 4 Leadership Limited:

Leadership Judgement Indicator – this is an on-line 'test' that can be taken in about 40 minutes. It measures your leadership judgement and preferences against other people so you can compare your relative strengths and weaknesses with other people.

There are several editions of this for you to choose from:

- General management
- Sales management
- Senior management in multinational business
- School leadership
- Public sector management

It can be a good idea to complete one of these Indicators before you begin working on CotD to get some idea of your competence, then complete an Indicator after three months to measure your progress. When you order an Indicator be sure to discuss the type of report available so that you get one that best suits your needs.

Coaching support – this can take a number of forms:
- a one-off session towards the end of your three months to discuss your progress;
- a six or ten session engagement where you discuss your progress after every fifteen sessions of using the Cotd. If you can integrate this with the completion of a Leadership Judgement Indicator, so much the better.

During this coaching you will go into more detail about your leadership judgement and preference by using the following framework.

The Formula 4 Leadership website has more information about the types of coaching support available and you can find an approach that fits your needs and the amount you would like to invest in your own development.

Formula 4 Leadership Personal Development Planner

Recommended Procedure for Using Formula 4 Leadership® Development Report

1. Be prepared for the SARA response –

   S   -   SHOCK
   A   -   ANGER
   R   -   REJECTION, before
   A   -   ACCEPTANCE

This is quite a common reaction process and should not surprise anybody.

2. On your own, take a highlighter pen and pick out the parts that stand out.

3. Photocopy the report and give it to at least one person you know and trust. Ensure that it is someone who can offer you balanced feedback. Ask for their comments.

4. Now plot all the points raised and highlighted on a 'PMI Chart' (see next page). This has three areas labelled 'Plus Points', 'Minus Points' and 'Interesting Points'.

5. Turning first of all to the 'PLUS' points, choose **one** area and either:
   a) devise a specific plan for coaching a colleague in that area, or
   b) devise a means whereby you can more visibly demonstrate that skill to your boss, colleagues and others around you.

6. Take **one** of the points you have rated as a 'MINUS' that you wish to address first. Your decision should be based on how critical this is for job success.

7. For this 'MINUS' point devise a plan of action which focuses on each of the following:

   - MY GOAL – what I will have achieved to resolve it in three months

   - MY STRATEGY – how I am going to achieve that goal

   - WHO I SHALL INVOLVE – what I specifically need from others to gain success

   - WHAT I SHALL DO TOMORROW – the first step on my way

   - WHAT NEXT – having achieved my goal, which 'PLUS' and 'MINUS' characteristics I shall deal with next

8. Discuss Steps 4 to 7 with your line manager or other trusted person, then write them up into a Development Plan which you should sign off with them.

Provide a copy of your Development Plan to interested parties.

PMI CHART

Instructions

Consider the guidance given on the previous page before completing this Chart.

Pᴌᴜs ᴘᴏɪɴᴛs	Mɪɴᴜs ᴘᴏɪɴᴛs
[The findings I like and value in the Report]	[Any identified weaknesses, difficulties or areas of concern]

Iɴᴛᴇʀᴇsᴛɪɴɢ ᴘᴏɪɴᴛs

[Any other issues or points raised which are worth noting]

Name: Date:

Formula 4 Leadership Personal Development Plan

NAME:

DATE:

PLUS POINT I INTEND TO FOCUS ON:

Celebrate this!

How I am going to use the PLUS POINT:

Devise a plan to coach a colleague or another way you can make this strength visible to those around you.

MINUS POINT I INTEND TO ADDRESS FIRST:

It is always best to be focused and choose one thing at a time. You can expect a 'ripple effect' on the other things you want to change if you do this.

MY GOAL – what I will have achieved in three months time:

Make it Specific, Measurable, Achievable, Realistic, Time-bound (ie SMART)

MY STRATEGY – how I am going to achieve my goal?

What are you actually going to do? Ideally, make these steps, "Hey, Bob, come and watch me ……, " statements.

FIRST STEP – what I will do tomorrow:

It is important to describe the first thing you are going to do to address this. The more immediate the better.

WHO WILL BE SUPPORTING ME?

What shall I need from others to gain success?

DATE OF FIRST REVIEW:

With coach, trainer, colleague or manager after three weeks.

DATE OF SECOND REVIEW:

With coach, trainer, colleague or manager after another four weeks.

DATE OF THIRD REVIEW:

With coach, trainer, colleague or manager after another five weeks.

MINUS POINT I INTEND TO ADDRESS NEXT:

Again, make this relevant to high job performance. Choose another thing that you are sure you can do something about.

MY GOAL – what I will have achieved in another three months time:

As before, make it Specific, Measurable, Achievable, Realistic, Time-bound (ie SMART)

MY STRATEGY – how I am going to achieve my goal?

What steps are you actually going to take? These should be observable actions that can be expressed as, "Hey, Bob, come and watch me ……, " statements.

ACTION – what I will do tomorrow:

Again, it is important to be clear about the first step on your way. This is a measure of your intent.

PLUS POINTS I INTEND TO KEEP USING:

It is absolutely essential that your strengths are not ignored. They need maintaining and developing. Find ways to share these assets with others.

_____   _____
Signatures   Date

Comments from users of the Coach on the Desktop

"Great session, found the questions really powerful, coachee very much on board. The CotD provided a whole new level of depth and use, thank you". Independent Business and Sports Coach

It made me reflect about why I sometimes find it difficult to delegate certain types of task. During the course of using the Coach on the Desktop I had a bit of a "Eureka" moment. I realised that there was a definite trend in the way in which I approached getting things done when working with others. I now give much greater consideration when weighing up whether any of my colleagues have sufficient information, expertise and confidence to make a high quality decision for themselves. This is allowing me to assign more activities to my colleagues and focus more of my own time and attention on broader, more strategic and added value challenges. Partner and Partnership Director - Solicitors Firm

"The use of the Coach on the Desktop decision making tool proved to be valuable not only in terms of honing my judgement of the appropriate use of different styles of decision making in different situations, but interestingly, it also provided me with a real 'revelation' in identifying that there was a need for clarity about the responsibility for key decisions within the leadership team". Library Central Services Manager - University in New Zealand

"The discussion were very complete, with efficient use of CotD just after. The relationship was interesting, and I had the chance to share my view without any judgment. For me, it's easier to make it by phone; it's like a mentor relationship, so really great experience". Senior Sales Executive - Global Computer Supplier
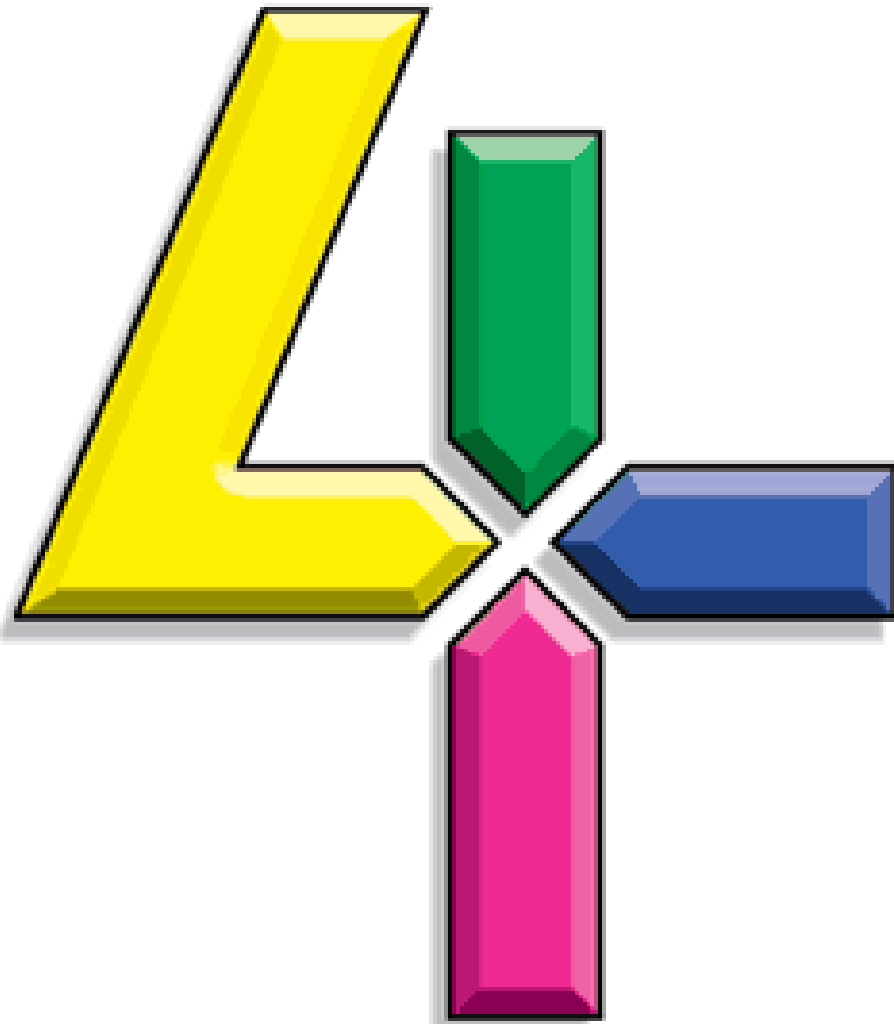
Leadership Judgement Indicator (LJI), Leadership Judgement Indicator - Global Edition (LJI-G), Leadership Judgement Indicator - Sales Edition (LJI-S), Leadership Judgement Indicator - Public Sector Edition (LJI-PSE), Leadership Judgement Indicator - School Leaders' Edition (LJI-SL), Coach on the Desktop (CotD), Training, Organisational Development, Assessment and Development Centres

Assessment - Development - Online Solutions

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COACH ON THE DESKTOP (CotD)