The Leader's Role in Developing Talent

Strategies for Building Capability

Having Difficult Conversations

Leadership and Ethics

Continuing Your Leadership Journey

The Leader's Need to Be Resilient

Taking Care of Yourself
# Session 4: Talent Management and Continuing Your Leadership Journey

## Day One

Tuesday, September 15, 2015 - Yale University
Meeting Location: The Graduate Club, The Great Room, 155 Elm Street, New Haven, CT 06511

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00 am</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td>8:30 am</td>
<td><strong>Opening Comments</strong></td>
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<tr>
<td></td>
<td>Overview on the Agenda</td>
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<tr>
<td></td>
<td>Welcome to Yale University</td>
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<tr>
<td></td>
<td>Reflection: What Did You Do Since Session I? What Have You Learned?</td>
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<tr>
<td></td>
<td>Leadership Journeys: Linda, Rob</td>
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<tr>
<td>12:30 pm</td>
<td>Lunch</td>
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<td></td>
<td>Leadership Journeys: Nate, Alex</td>
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<tr>
<td>12:30 pm</td>
<td><strong>The Leaders Role in Developing People</strong></td>
</tr>
<tr>
<td></td>
<td>Importance of Talent Management</td>
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<tr>
<td></td>
<td>What Have You Learned about This Key Competency?</td>
</tr>
<tr>
<td></td>
<td>Starts With Selection, Getting the Best, Interviewing for Competencies</td>
</tr>
<tr>
<td></td>
<td>On-Boarding Can Make a Difference</td>
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<tr>
<td></td>
<td>Assessing Your Staff for Potential and Performance</td>
</tr>
<tr>
<td>5:00 pm</td>
<td><strong>Strategies for Building Capability</strong></td>
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<tr>
<td></td>
<td>Creating a Development Plan for Your Staff</td>
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<td></td>
<td>Creating an Environment that Fosters Employee Engagement</td>
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<td>Elements Needed to Maintain Highly Engaged Employees</td>
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<tr>
<td>5:00 pm</td>
<td><strong>Having Difficult Conversations</strong></td>
</tr>
<tr>
<td></td>
<td>What Difficult Conversations Do You Need to Have?</td>
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<tr>
<td></td>
<td>Preparing and Engaging in Needed Conversations</td>
</tr>
<tr>
<td></td>
<td>Leadership Journeys: Louis, Venkat D.</td>
</tr>
<tr>
<td>5:00 pm</td>
<td><strong>Wrap Up by</strong></td>
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</tbody>
</table>
Session 4: Talent Management and Continuing Your Leadership Journey

Day Two
Wednesday, September 16, 2015
Meeting Location: The Graduate Club, The Great Room 155 Elm Street, New Haven, CT 06511

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>8:00 am</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td>8:30 am</td>
<td>Opening Comments</td>
</tr>
<tr>
<td></td>
<td>Overview on the Agenda</td>
</tr>
<tr>
<td></td>
<td>Reflections on Leadership, Len Peters, CIO, Yale University</td>
</tr>
<tr>
<td></td>
<td>Lessons on Talent Management</td>
</tr>
<tr>
<td></td>
<td>Leadership Journeys: Graham, Michael A., Ellen</td>
</tr>
<tr>
<td>8:30 am</td>
<td>A Perspective on Leadership</td>
</tr>
<tr>
<td></td>
<td>Steve Murphy, Associate Vice President for Finance and University Controller, Yale University</td>
</tr>
<tr>
<td>12:00 pm</td>
<td>Lunch</td>
</tr>
<tr>
<td></td>
<td>Leadership Journeys: Andre, Diane</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Courage Conviction, Confidence</td>
</tr>
<tr>
<td></td>
<td>Are These Leadership Attributes?</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Executive Presence</td>
</tr>
<tr>
<td></td>
<td>How Do You Rate Yourself on the 4 A's</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Lunch</td>
</tr>
<tr>
<td></td>
<td>Leadership Journeys: Andre, Diane</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Leadership and Ethics</td>
</tr>
<tr>
<td></td>
<td>What Are the Principles You Will Use to Guide Your Leadership?</td>
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<td></td>
<td>Values Based Decision Making</td>
</tr>
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<td></td>
<td>University of Illinois Admissions Case</td>
</tr>
<tr>
<td></td>
<td>Why Do Good Leaders Make Unethical Choices</td>
</tr>
<tr>
<td></td>
<td>Leadership Journeys: Diane, Randall</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Executive Presence (part two)</td>
</tr>
<tr>
<td></td>
<td>What Feedback/Feed-forward Would You Offer Others?</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Wrap Up by</td>
</tr>
<tr>
<td></td>
<td>Reception: Consiglio’s, 165 Wooster Street, New Haven, 6:30 pm</td>
</tr>
<tr>
<td></td>
<td>Dinner: 7:15 pm</td>
</tr>
</tbody>
</table>
# Session 4: Talent Management and Continuing Your Leadership Journey

## Day Three

Thursday, September 17, 2015  
Meeting Location: The Graduate Club, The Great Room, 155 Elm Street, New Haven, CT 06511

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 am</td>
<td>Continental Breakfast</td>
</tr>
</tbody>
</table>
| 8:30 am | Opening Comments  
Overview on the Agenda  
Reflections on Yesterday’s Session  
Leadership Journeys: Beth, Gonzalo, Heather |
| 12:00 pm | GRADUATION/ LUNCH  
Welcome/Introductions  
What We Have Learned  
How We Have Applied What We Have Learned  
How You Can Leverage This Investment – What We Want You To Know  
Presentation of the Certificates  
Remarks from the Sponsors  
Closing Comments |
| 2:00 pm | |
Reflections on Learning

What did you do based on your engagement with the MOR Leaders Program since Session III?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What have you internalized as a result of this leadership development experience?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What would you like to work on during this session?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

“Learning without reflection is a waste; reflection without learning is dangerous.” - Confucius

Session III Topics

<table>
<thead>
<tr>
<th>Emotional Intelligence</th>
<th>Examining Mental Models</th>
<th>Coaching for a Breakthru</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mapping Your Network</td>
<td>Leadership as a Performance Art</td>
<td>Focusing on Results</td>
</tr>
<tr>
<td>Perspectives on Leadership</td>
<td>Improv as a LDSP Skill</td>
<td>Developing Measures in IT</td>
</tr>
</tbody>
</table>
Developing People

What have you learned about developing people that is helpful?

________________________________________________________________________

________________________________________________________________________

What is important at the recruitment, interviewing, and hiring phase?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What do you need to do to on-board a new employee successfully?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What helps motivate staff?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

How do you support top performers and how do you work with low performers?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Integrated Talent Management

- Talent Planning
- Staff and Skills Needed

- Recruitment and Selection
- On-boarding

- Development Plans
- Career Goals and Roadmaps
- Development Opportunities
- 3 E’s

- Establish Expectations
- On-going Feedback
- Performance Evaluation
- Coaching and Mentoring
“George Marshall understood that leaders must spend the time to recruit the right people for the job and then support them completely, so that they can do the job. The exceptional leader sees his or her job as enabling people to do their jobs.”

Peter Drucker

“When you are looking for talent, you have a license and an obligation to go hunting for the best person possible, don’t settle for good enough.”

Jim Bruce
CIO Emeritus, MIT

Developing Talent

Selection
- Expand the Pool
- Establishing Competencies and Criteria

On-Boarding
- Establish Expectations
- Provide a Way to Learn the Landscape
- Have the Culture Explained
- Share Key Themes
- Provide a Stretch Assignment

Situational Leadership
- Assess the Person’s Level of Competence
- Assess the Level of Commitment
- Adapt Your Leadership Style

Professional Development
- Set Goals and Strategies
- Identify Opportunities
- Agree on Practices

Process Timeline
Hire the Best,
Develop Your People

“Recruit well—develop your people.
Exploit strengths of people.
Err on the side of delegation—everybody wins.
Match project phase and talent.”

Dave Briggs
Former Director Lincoln Lab, MIT

Give yourself an unfair advantage:
develop your people.

• Establish clear expectations, measurable goals, and simple feedback systems.
• Provide opportunities for continued development.
• Create stretch assignments.
• Use coaching or mentoring within your unit.
• Change assignments from time to time.
• Offer timely feedback.
• Ask for feedback frequently.
• Acknowledge progress in visible ways.

Delegation Tips

What is Delegation?

Delegation is the work a manager does to entrust responsibility and authority to others and create new accountability for results. Delegation is a process that ensures people are empowered.
Hiring the Best

Competency Based Interviewing

When you are involved in hiring someone, what do you base your decision on?

Prepare to conduct a competency-based interview of a high priority candidate that will be a peer on the Director's staff. You can consult with your HR resource if you need to know more. The position involves providing consulting and support services to clients. Start by identifying the key competencies. The competencies listed below are the ones selected as the basis for the IT Leader curriculum. Other competencies are listed on the next page.

Strategic thinking from a systems perspective.

The leader contributes to the organization's development of a vision and priorities, anticipates the future, and builds scenarios based on explicit assumptions.

Shared leadership.

The leader builds working relationships with co-workers and external parties, negotiates and handles problems without alienating people, obtains cooperation through influence, and delegates both responsibility and authority appropriately.

Communication and persuasion.

The leader distills ideas into focused messages that inspire support or action from others and effectively communicates through presentations, recommendations, or writing. The leader uses appropriate interpersonal styles to guide and persuade individuals and groups.

Change management.

The leader acts as a catalyst for the needed changes, develops plans, and follows through on change initiatives.

Decision making.

The leader gathers and uses data and analysis to make decisions, including evaluating the long-term consequences, and makes decisions judged to be right for the university.

Financial and business acumen.

The leader possesses financial savvy and demonstrates the ability to lead cost-efficient initiatives without sacrificing quality. He or she successfully leads projects and programs that produce favorable results (business and financial outcomes) and demonstrates understanding of the changing financial constructs supporting IT.
Working across the organization, developing strategic partnerships.

The leader develops networks and alliances, collaborates across boundaries, and finds common ground with a wide range of stakeholders. He or she can maneuver through political situations effectively to get things done.

The leader maps and manages complex initiatives, continually adjusts plans and strategies based on new information, and identifies and coordinates appropriate resources to support objectives.

Building agreement.

The leader recognizes different points of view, brings them out into the open, and builds on areas of agreement, exercising influence in ways that enhance the support needed to advance initiatives and building consensus when appropriate.

Self-knowledge.

The leader knows his or her own personal strengths, weaknesses, opportunities, and limits; seeks feedback; and gains insight from mistakes.

Possible Criteria for Hiring

- Action Oriented
- Dealing with Ambiguity
- Approachability
- Business Acumen
- Compassion
- Composure
- Conflict Management
- Confronting Direct Reports
- Creativity
- Customer Focus
- Timely Decision Making
- Delegation
- Developing Direct Reports
- Directing Others
- Managing Diversity
- Ethics and Values
- Functional/Technical Skills
- Hiring & Staffing
- Integrity & Trust
- Intellectual Horsepower
- Interpersonal Savvy
- Listening
- Managing & Measuring Work
- Motivating Others
- Negotiating
- Organization
- Planning
- Political Savvy
- Presentation Skills
- Priority Setting
- Problem Solving
- Process Management
- Drive for Results
- Strategic Agility
- Managing Through Systems
- Building Effective Teams
- Work/Life balance
- Written Communications
Identify the top two competencies a director in charge of providing consulting and support needs to be effective.

1. 

2. 

Outline how you will begin your conversation with the candidate.

What questions will you ask during the interview? How will you get at the competencies?

____________________________________

____________________________________

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____________________________________
Debrief Competency Based Interviewing

How did the interviewer do?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What did he or she do well?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What could he or she have done more effectively to draw out the applicant’s experience?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

How could you formulate questions when you are interested in learning about the individual’s level of experience, judgement, eq or other key areas?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What other ways could you use to learn more about this person’s capabilities?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

“One of primary reasons that we spend so much time and energy on the hiring process for a faculty member is the importance of the caliber of people that we attract. I point out to people on the hiring committee that this is a multi-million dollar decision.”
On-Boarding Suggestions

1. Orientation
   - Provide an opportunity for the new person to learn about the organization
   - This individual should meet identity-key people

2. Develop a Start Up Plan
   - Set and communicate priorities
   - Agree on timelines for completing them

3. Organize and Provide the Resources for Success
   - Spend time directing, training or coaching
   - Build an effective relationship

4. Create Meaningful Goals
   - Set goals for performance
   - Set goals for development
   - Ensure there are ways to measure progress

5. Help the Individual Understand the Landscape
   - Encourage the person to observe and describe the culture
   - Have the individual study the political landscape

6. Conduct Periodic Feedback Sessions
   - What’s working?
   - What’s could be improved?
Integrated Talent Management

- Talent Planning
- Staff and Skills Needed

- Recruitment and Selection
- On-boarding

- Development Plans
- Career Goals and Roadmaps
- Development Opportunities
- 3 E’s

- Establish Expectations
- On-going Feedback
- Performance Evaluation
- Coaching and Mentoring
Performance and Potential Worksheet

Originally developed in 1991, the nine-block (box) decision matrix was popularized by General Electric in a 1999 case study by Harvard Business School. Since then, many best-practice organizations have adopted the matrix. Its primary benefit is that it enables decision-makers to uniformly review organizational talent, consider its talent pipeline and conduct succession planning activities.

Notes:

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________

_____________________________________________________________________
Measuring Performance

What is performance?
- The current level of functioning; competence, skill, behavior

How do we measure performance?
- Contributions, results, outcomes
- Performance ratings; (e.g. needs development, meets expectations, exceeds expectations)
- Performance against key leadership attributes

Measuring Potential

What is potential?
- Existing in or expressing the possibility
- Capable of development into actuality

How do we measure or assess potential?
- Determine ‘potential’ criteria
  • Open-mindedness
  • Bias towards personal accountability
  • Willingness to take risk
  • Ability to learn from past successes and failure
- Potential ratings; (e.g. limited, growth, high)
Positioning Those Who Report to You

<table>
<thead>
<tr>
<th>Performance</th>
<th>Potential</th>
<th>Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Performance/Low Potential</td>
<td></td>
<td>• Gets all important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Is a pro in his/her position</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Is seen as a leader in his/her area</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Has reached potential</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Continue developing in current position; is in the right job</td>
</tr>
<tr>
<td>High Performance/Med Potential</td>
<td></td>
<td>• Gets all important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Acts as leader and role model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Exhibits many strengths or competencies beyond current role</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Some leadership development issues</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Look for opportunity to display leadership in current job</td>
</tr>
<tr>
<td>High Performance/High Potential</td>
<td></td>
<td>• Gets all important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Acknowledged as leader and role model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Exhibits many strengths or competencies beyond current role</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Has influence beyond current role</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Stretch assignments to prepare for larger role</td>
</tr>
<tr>
<td>Medium Performance/Low Potential</td>
<td></td>
<td>• Gets most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Is very proficient in his/her current position</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Is not seen as a leader in his/her area</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Work on improving performance in current job; may be candidate for lateral move</td>
</tr>
<tr>
<td>Medium Performance/Med Potential</td>
<td></td>
<td>• Gets most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Shows signs of leader and role model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Exhibits many sr. level competencies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• May be new in position</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Leave in current job; continue developing skills and improving performance</td>
</tr>
<tr>
<td>Medium Performance/High Potential</td>
<td></td>
<td>• Gets most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Acknowledged as leader and role model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Exhibits many strengths or competencies beyond current role</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Acts at level of capability of next level in the organization</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Focus on performance short term and development opportunities long term</td>
</tr>
<tr>
<td>Low Performance/Low Potential</td>
<td></td>
<td>• Isn’t getting most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Difficulty performing to standards in his/her current position</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Consider exit option or reassignment to lower level on your team</td>
</tr>
<tr>
<td>Low Performance/Medium Potential</td>
<td></td>
<td>• Isn’t getting most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Capable of making higher contribution</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• May be in wrong job or occupied with non-work distraction</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Focus on improving performance</td>
</tr>
<tr>
<td>Low Performance/High Potential</td>
<td></td>
<td>• Isn’t getting most important things done</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Has been acknowledged as team player and role model</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Has exemplified sr. level competencies</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• May be in wrong job</td>
</tr>
<tr>
<td>Action Required:</td>
<td></td>
<td>Address root cause performance issue; worthy of investment in development</td>
</tr>
</tbody>
</table>

Notes:
Talent Management

MOR Leaders

Sustain  Leverage  Advance

Improve  Develop  Propel

Transition  Transform  Grow

Performance  Potential

Notes:
## Motivating Staff Worksheet

Allocate 100 points according to what motivates you

<table>
<thead>
<tr>
<th>Recognition</th>
<th>Meaningful Work (Mission matters!)</th>
<th>Autonomy/Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ /100</td>
<td>_______ /100</td>
<td>_______ /100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity to Participate</th>
<th>Valued Development, Challenge</th>
<th>Pay/Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ /100</td>
<td>_______ /100</td>
<td>_______ /100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Having a Good Manager</th>
<th>Positive Environment</th>
<th>Being Informed/Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>_______ /100</td>
<td>_______ /100</td>
<td>_______ /100</td>
</tr>
</tbody>
</table>

### What Are Your Top Motivators?

1. 
2. 
3. 
4. 
5.
3E Development Framework

**Education**
- Instructor-Led Courses
- E-Learning Programs
- Selected Readings

**Exposure**
- Feedback
- Visibility Opportunities
- Coaching and Mentoring
- Role Models

**Experience**
- On-the-Job Tasks & Special Projects
- Job Changes & Rotations
- Special Stretch Assignments

*Education & Exposure prepare one for new experiences & responsibilities*

*Experience is primary way people learn and develop over course of their career*
Worksheet

1. What are some of the difficult conversations you have or need to have?

2. What are some issues that come up for you as you contemplate having a difficult conversation?

3. How can you draw on your emotional intelligence to help you handle a difficult conversation?

4. What have you found works when you engage in a difficult conversation?
Having Difficult Conversations

Choices:

A. AVOID  
B. DIVERT  
C. DO POORLY  
D. HANDLE THEM

As you know from your own life experiences, conflict and disagreement are normal. Conflicts actually can be healthy. Conflicts can expose you to a different perspective or bring out an underlying difference that is undermining progress.

In order to have a successful outcome you need to ensure the timing is right. Timing after all is everything! Sometimes individuals need to cool off before having a conversation, sometimes the setting isn’t conducive to having a more open conversation.

1. Prepare ahead of time,
2. Know what you want to say,
3. What outcome you would like? Remember the point of having a conversation is to resolve the conflict.
4. Make sure you present the facts and are open to hearing the individual’s perspective.
5. Listen to what s/he saying and do not interrupt.
6. Stay focused on coming to a solution
7. Determine if there are any common areas that you both can agree on.
8. If you are able to come to a resolution, make sure you both agree on what action will be taken and when there will be additional follow-up.

Conflicts bring out emotions; thus the other party may vent and express their feelings. However, if either party begins to lose control or the discussion begins to become unproductive, do not be afraid to stop having the conversation. You can always meet again at a later time.
Having Difficult Conversations

**MOR Leaders**

4 Steps to a Successful Outcome

The majority of the work in any conflict conversation is work you do on yourself. No matter how well the conversation begins, you’ll need to stay in charge of yourself, your purpose and your emotional energy.

**Step #1: Ask**

Cultivate an attitude of discovery and curiosity. Use inquiry to learn as much as possible about the other person’s point of view. What do they really want? What are they not saying? Let them talk until they’re finished. Don’t interrupt except to acknowledge.

**Step #2: Acknowledgment**

Acknowledge means to show that you’ve heard and understood. Explain back to them what you think they’re really going for. Acknowledge whatever you can, including your own defensiveness if it comes up.

**Step #3: Articulate**

When you sense that they’ve expressed all their energy on the topic, it’s your turn. What can you see from your perspective that they’ve missed? Help clarify your position without minimizing theirs.

**Step #4: Address Options**

Now you’re ready to begin exploring solution solutions. Outlining possible options is useful, along with continued inquiry. Find something that could work and build on it.

**Practice, practice, practice!**

The art of conversation is like any art – with continued practice you acquire skills and ease.
Resolving Interpersonal Conflict

**Recognize when it exists and deal with it.**
Conflict will not go away if ignored. It may get worse and show up in other ways.

**Find a neutral area to discuss the situation.**
Look for a place and a time where people can be relaxed and deal more objectively.
Give people the space and/or time to calm down emotionally.
Have a third person join in the discussion to help facilitate the conversation, if needed.

**Discuss the situation using the guidelines for constructive feedback.**
Be descriptive and specific; avoid judgmental comments.
Keep emotions under control let cooler heads prevail.

**Look for the underlying cause(s).**
Go beyond the obvious.

**Explore ways to resolve the conflict.**
What are some potential solutions?

**Identify common ground and build agreements.**
Highlight the goals/objectives that may be similar.

**Follow up on agreements; establish a practice if this is helpful.**

---

**Make Deposits into EBA thru**
- Courtesy
- Kindness
- Honesty
  - By keeping commitments
  - By seeking to really understand someone
  - By taking the time to state and clarify expectations

**What Undermines a Relationship**
- Unclear or unstated expectations
- Not keeping a commitment
- Not exhibiting integrity
  - ...

**Integrity --- Honesty**
Honesty is telling the truth conforming our words to reality
Integrity is conforming reality to our words

**Show Integrity By**
- Being loyal to those not present
- By avoiding communications that are deceptive
**Opening the Conversation - The Words We Use Matter**

How do I begin the conversation? Here are a few conversation openers:

“I have something I’d like to discuss with you that I may help us work together more effectively.”

“I’d like to talk about __________ with you, but first I’d like to get your point of view.”

“I need your help with what just happened. Do you have a few minutes to talk?”

“I need your help with something. Can we talk about it (soon)?” If they say, “Sure, let me get back to you,” follow up with them.

“I think we have different perceptions about __________. I’d like to hear your thinking on this.”

“I’d like to talk about ____________. I think we may have different ideas on how to ____________.“

“I’d like to see if we might reach a better understanding about __________. I really want to hear your views about this and share my perspective as well.”

Write a possible opening for your conversation here:

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________
Day Two

Wednesday, September 16, 2015
Meeting Location: The Graduate Club, The Great Room 155 Elm Street, New Haven, CT 06511

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**Continental Breakfast** 8:00 am

**I Opening Comments** 8:30 am
Overview on the Agenda
Reflections on Leadership, Len Peters, CIO, Yale University
Lessons on Talent Management
Leadership Journeys: Graham, Michael A., Ellen

II A Perspective on Leadership
Steve Murphy, Associate Vice President for Finance and University Controller, Yale University

III Courage Conviction, Confidence
Are These Leadership Attributes?

IV Executive Presence
How Do You Rate Yourself on the 4 A’s

Lunch 12:30 pm
Leadership Journeys: Andre, Diane

V Leadership and Ethics
What Are the Principles You Will Use to Guide Your Leadership?
Values Based Decision Making
University of Illinois Admissions Case
Why Do Good Leaders Make Unethical Choices

Leadership Journeys: Diane, Randall

VI Executive Presence (part two)
What Feedback/Feed-forward Would You Offer Others?

VII Wrap Up by 5:00 pm

Reception: Consiglio’s, 165 Wooster Street, New Haven, 6:30 pm
Dinner: 7:15 pm
Reflections Practice

What are the take-aways you have from yesterday?

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Name one on-the-job application of what you listed.

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A Perspective on Leadership

Steve Murphy, Associate Vice President for Finance and University Controller, Yale University

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Courage, Conviction, and Confidence

**Courage** - the ability to do something that you know is difficult or dangerous

Courage-mental or moral strength to venture, persevere, and withstand danger, fear, or difficulty

Merriam Webster

Courage—that quality of mind which enables one to encounter danger and difficulties with firmness, or without fear, or faint of heart; valor; boldness; resolution.

“Your time is limited, so don’t waste it living someone else’s life. Don’t be trapped by dogma - which is living with the results of other people’s thinking. Don’t let the noise of others’ opinions drown out your own inner voice. And most important, have the courage to follow your heart and intuition.”

Steve Jobs

“Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen.”

Winston Churchill

“I learned that courage was not the absence of fear, but the triumph over it. The brave man is not he who does not feel afraid, but he who conquers that fear.”

Nelson Mandela

“You will never do anything in this world without courage. It is the greatest quality of the mind next to honor.”

Aristotle

Middle English corage, from Anglo-French curage, from quer, coer heart, from Latin cor — more at heart

**Self Assessment**

**Courage** - think of a time(s) when the situation called for you to take a stand or for you to act with courage in another way.

How do you rate yourself on this attribute?

Not Much 1  Too Much 10
Courage, Conviction, and Confidence

**Conviction** - the feeling of being sure that what you believe or say is true

Conviction - a strong persuasion or belief

“The final test of a leader is that he leaves behind him in other people the conviction and the will to carry on.”

Walter Lippmann

“What convinces is conviction. Believe in the argument you’re advancing. If you don’t you’re as good as dead. The other person will sense that something isn’t there, and no chain of reasoning, no matter how logical or elegant or brilliant, will win your case for you.”

Lyndon B. Johnson

“A ‘No’ uttered from the deepest conviction is better than a ‘Yes’ merely uttered to please, or worse, to avoid trouble.”

Mahatma Gandhi

“Because with courage and conviction I believe we can deliver a more flexible, adaptable and open European Union in which the interests and ambitions of all its members can be met.”

David Cameron

**Self Assessment**

**Conviction** - think of a time(s) when the situation called for you to take a stand or for you to act with conviction.

How do you rate yourself on this attribute?

Not Much 1 Too Much 10
Courage, Conviction, and Confidence

Confidence - a feeling or belief that you can do something well or succeed at something.

Confidence - faith or belief that one will act in a right, proper, or effective way.

“We gain strength, and courage, and confidence by each experience in which we really stop to look fear in the face... we must do that which we think we cannot.”
Eleanor Roosevelt

“Believe in yourself! Have faith in your abilities! Without a humble but reasonable confidence in your own powers you cannot be successful or happy.”
Norman Vincent Peale

“Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence.”
Helen Keller

Self Assessment

Confidence - think of a time(s) when the situation called for you to take a stand or for you to act with confidence.

How do you rate yourself on this attribute?

Not Much 1

Too Much 10
Executive Presence Attributes

4 Attributes Associated with Executive Presence

- Assurance, self assured
- Articulate
- Appearance
- Authentic

The 4 A’s of Executive Presence

Please provide candid feedback to your colleagues on these attributes of executive presence.

Name:

________________________________________________________________________

Name:

________________________________________________________________________

Name:

________________________________________________________________________

Name:

________________________________________________________________________

Name:

________________________________________________________________________

Name:
The 4 A’s of Executive Presence

**assurance**

*noun*
1. the state of being sure or certain about something
2. a strong feeling of confidence about yourself or about being right.

Mirriam-Webster

**appearance**

*noun*
1. the way that someone or something looks.
2. an act of performing or participating in a public event.
3. an act of becoming visible or noticeable; an arrival.

Google Dictionary

**articulate**

*adjective*
1. using language easily and fluently; having facility with words.
2. expressed, formulated, or presented with clarity and effectiveness.

Dictionary.com

**authentic**

*adjective*
1. genuine, legitimate
2. The quality or condition of being authentic, trustworthy, or genuine.

TheFreeDictionary.com

100% the real deal
Executive Presence

When everyone in this leadership program first interacted, you were all on stage. Each of you made an initial impression on others and you recorded your initial impressions of others. The first impressions exercise revealed this dynamic and it was an early introduction to the concept of presence.

In the follow on to this exchange, MOR program leaders declared, “Everyone has presence, and it matters.” True, but not everyone has “executive presence.”

As individuals advance in their career, it is helpful to develop executive presence. This is particularly important to have when interacting with senior leaders who often listen to the message while evaluating the messenger.

Executive presence is the combination of confidence, poise, and authenticity that convinces the rest of us we’re in the presence of someone who’s the real deal. It’s the amalgam of qualities that telegraphs that you are in charge or deserve to be. EP is not a measure of performance. It is a measure of image.

Sylvia Ann Hewitt, Executive Presence

As Hewitt’s definition makes plain, confidence forms the core of executive presence. Why? Confident people give off the air of competence. You can be extremely competent, but if you lack confidence, you may come across as nervous or tentative and, as a result, less credible.

Both presence and executive presence are more than first impressions, but a powerful first impression goes a long way toward projecting a positive professional image and creating executive presence. For leaders, walking onto a platform to make a presentation, engaging in discussion around a conference table, or simply chatting with an informal group are all opportunities to create an impression that enhances their ability to influence.

A lack of executive presence can be career limiting or undercut your ability to win the support needed for that proposal you have been working on for months. People can spend hours putting together a presentation for the senior leaders or the Board and spend very little time practicing the presentation. How you deliver the message may be as important as the content you anguished over. In fact, it could be the deciding factor.
Executive Presence in Women

Women possess 60 percent of bachelor’s degrees and make up nearly 50 percent of the workforce. Yet, only 9 percent of management positions in IT are held by women\(^1\). Why? There are several reasons. Women must overcome ‘second generation’ forms of gender bias. These subtle barriers, which exist due to prior decades of bias, include a lack of women role models, lack of access to networks and sponsors, and double binds. An example of double bind is the traditional link between masculinity and leadership. Leaders, like men, are expected to be decisive, strong, assertive, and independent. Women, in contrast, are traditionally expected to be nice, unselfish caretakers\(^2\). Women and men exhibiting the same behavior may be interpreted differently. Men may be deemed to be assertive while women may be perceived to be aggressive or arrogant.

Further, many women feel that executive presence – a primary factor in getting promoted – is based on white male standards that may not reflect their authentic selves. In fact, 64% of women feel forced to conform to more specific standards than men\(^3\). Conforming to these standards costs them their authenticity. This is a brutally unfair irony.

Nevertheless, women know that they must seek feedback to develop their executive presence. The problem is that it’s tough to get honest feedback. Male executives might hesitate to provide feedback for fear of saying the wrong thing or being perceived as sexist. So, they provide vague or contradictory feedback such as, “Be more forceful, but don’t be strident.” This is hard to act on. Women may be left confused or questioning what would be an appropriate behavior.

These challenges are significant. But they only make getting the right feedback even more important. Women should select the right mentor. Mentors can provide coaching and guidance, protection, and role model aspiration. Previous research suggests that mentoring is most effective for women when their mentor is female. Same-gender mentorships make it easier to imitate the mentor’s behavior and to share perspectives with someone who has an understanding of the unique workplace challenges they face.

That being said, women should also seek out and welcome the help of male colleagues. By identifying and working with trusted peers, women can develop their own personal “old boys’ network.” That is how many of the executives on Fortune’s Most Powerful Women list say they rose beyond middle management. These women also built their executive presence and credibility by taking on tough (and highly visible) stretch assignments and blowing their own horn in tactful ways.

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3. Do You Have Executive Presence? Marie Claire, November 2012
Suggestions for Improving Your Executive Presence

Assurance

• **Be aware of your emotions.** The fight or flight physical response to stressful work situations can trigger anxiety. Anxious body language is the opposite of the assurance you want to portray. The best way to outflank this physical response is with a physical act: deep breathing.

• **Be still.** Fidgeting also shows anxiety and discomfort. Be still, particularly in your head and neck.

• **Smile and make eye contact.** Eye contact is a display of confidence. However, appropriate eye contact does not always mean holding direct eye contact. Those with executive presence rarely stare at people.

• **Be comfortable with silence.** Pause for three seconds before speaking. Similarly, after you ask a question, be silent.

• **Avoid “uptalk.”** Uptalk is the act of ending declarative sentences with rising intonation. This makes the declaration sound like a question. Uptalk weakens your message. Avoid it.

• **Prepare.** Practice presentations beforehand. Consider the consequences of your decisions (positive and negative) and predict how people will react. Develop a command of all relevant facts and figures. Be ready to answer anytime someone wants to “double-click” on a topic.

Appearance

• **Strike an expansive pose.** To take a powerful pose, take up space. If seated, lean back. When standing, stand tall. Shoulders back. Put hands on your hips. Avoid being constricted (arms crossed, legs together, slouched, looking down).

• **Dress for the job you want, not the one you have.** Pay attention to detail. Wear professional attire. A blazer and open-collared shirt is almost always appropriate, particularly if they are high-end and tailored to fit you. Consider an upgrade. But avoid flashy and/or risqué jewelry or clothing.

• **Be physically fit.** Physical attractiveness is correlated with higher status. You don’t need to compete in triathalons, but being fit demonstrates capability and control.

• **Grooming matters.** Details in your personal hygiene also matter. For example, avoid dandruff and unwanted hair. Make sure your nails are presentable. Grooming shows attention to detail.
Articulate

- **Talk the talk.** Develop business acumen. Familiarize yourself with the language of your business. What are the key metrics and what drives them? Ground statements in data.
- **Eliminate “filler” words.** Get rid of um, uh, like, and so.
- **Avoid minimizing words.** When you start sentences with “I’m sorry,” “I just,” or “This will only take a second,” you reduce your power. Similarly, do not add qualifiers like “I think” or “I feel” before factual statements.
- **Simplify your speech.** The use of complex grammar structures and sophisticated words can be off-putting to others. Use shorter words and sentences.
- **Speak up.** Above all, speak your mind. Studies consistently show that the more one contributes to a discussion, the more status one acquires.
- **Be concise.** Senior leaders want the executive summary version. Share the headlines not the details. Going into a lengthy technical explanation in most cases will be more than they want to know. They will ask for more information if needed.

Authentic

- **Be present.** Pay attention to your surroundings and those around you. Practice being “absent” for 10 seconds. Now, bring yourself back to being keenly “present.” Notice the difference! Focus on others. Listen to what is said and unsaid. Observe the dynamics in the room.
- **Honesty is the best policy.** To be trusted, you must be willing to “speak truth to power” when it matters – even when it is unpopular.
- **Don’t try to be someone you are not.** You are in your position for a reason. Play to your strengths. Focus on your area of expertise. Be a leader. But never try to portray some pre-conceived notion of what “an executive” is.
- **Share your enthusiasm and passion.** It will resonate with others.
- **Show warmth.** Although you should dress more formally, do not allow that formality to hide your personality. Be approachable and engaging. The more interested you are in others, the more interested they will be in you and your ideas.
Developing Your Presence

7 Traits of Executive Presence, The Key To Winning People Over

Composure: Self-awareness and understanding others; controlling your emotions, recognizing emotion in others and managing your response to them.

Connection: Engage others when communicating and make them feel comfortable.

Charisma: Learn to draw others to you.

Confidence: Communicate confidence in what you say and how you say it. Good posture is essential. Ensure your facial expressions matches your message. Choose wardrobe and accessories carefully.

Credibility: The language you use when you speak impacts your credibility. No non-words, no minimizers like “just,” “sort of,” and “this may not be a good idea but…”

Clarity: Clear communications is fundamental to exuding presence.

Conciseness: Being verbose kills presence.

Leadership presence is really the ability to do two things very well. The first is to demonstrate your value, ... the second is to connect well with your stakeholders. It means being authentic, comfortable in your skin, and getting your message across while connecting with those around you.

Muriel Wilkins, author of Own the Room, Discover Your Signature Voice to Master Your Leadership Vision, in an interview in the Washington Post July 1, 2014

It’s not what you say, it’s how you say it.
Deborah Greunfeld, Stanford GSB, Acting with Power, © 2011

Social meaning is derived mostly from non-verbal cues.
When verbal and non-verbal cues contradict each other, people trust the non-verbals.
**Managing Your Presence and Contribution • • • Practices Worksheet**

Being intentional about how you present yourself and contribute at meetings is an excellent practice. Doing this will increase your self-awareness and make you a more effective contributor. This worksheet will guide you to be more purposeful.

Purpose(s) of the meeting:

________________________________________________________________________

Desired outcome(s):

________________________________________________________________________

What is your role?

________________________________________________________________________

What contribution(s) will you make?

________________________________________________________________________

What “characters” will you need to bring to this interaction? (facilitator, cheerleader, etc.)

________________________________________________________________________

What is important for you to draw out of others? What process/tool will you use to engage others?

________________________________________________________________________

Indicate below how you think the meeting should play out if your plans work out. You can add your own measures at the bottom. After the meeting, mark how the meeting actually went.

<table>
<thead>
<tr>
<th>Others did all the talking</th>
<th>I did all the talking</th>
</tr>
</thead>
<tbody>
<tr>
<td>I let others manage the meeting</td>
<td>I actively facilitated the meeting</td>
</tr>
<tr>
<td>I didn’t contribute effectively</td>
<td>I contributed effectively</td>
</tr>
<tr>
<td>I didn’t advocate a particular view</td>
<td>I advocated a particular view</td>
</tr>
<tr>
<td>I need to be more intentional about my presence</td>
<td>I had the presence needed for this situation</td>
</tr>
</tbody>
</table>

<< More Accurate       More Accurate >>
Developing Your Brand

Branding is the art of aligning what you want people to think about your company with what people actually do think about your company. And vice-versa. Jay Baer - Convince & Convert. Author with Amber Naslund of The Now Revolution

A brand is the essence of one’s own unique story. This is as true for personal branding as it is for business branding. The key, though, is reaching down and pulling out the authentic, unique “you”. Otherwise, your brand will just be a facade. The power of a strong logo in brand identity is that a simple visual can instantaneously communicate a brand and what it is about. Some large brands are able to do this by symbol only, without words, that is the Holy Grail that brands dream about.

Paul Biedermann – re:DESIGN - See more at: http://heidicohen.com/30-branding-definitions/#sthash.zfZMZH06.dpuf

Successful branding is what you do, not what you say or show. Successful branding requires your delivering consistently positive experiences for your constituents. It comes from keeping your promises to them, from earning their trust that your brand will do its best at every point of contact to deliver on what they want and expect from you. This trust leads to their choosing your brand again. Successful brands never take their constituents for granted. They never forget that most important to constituents are what’s in it for them, that constituents are distracted, and you must earn their attention. The logo and theme line are not the brand.

Jim Siegel – HealthCare Chaplaincy - See more at: http://heidicohen.com/30-branding-definitions/#sthash.zfZMZH06.dpuf

5 Steps in Branding

Step 1: Define your brand and become an expert. Take the time to do some soul searching and determine exactly who you are and what makes up your brand.

Step 2: Establish a presence.

Step 3: Generate brand awareness through networking.

Step 4: Remember the 3 Cs of branding. Clarity, consistency, constancy. Be clear in who you are and are not.

Step 5: Get feedback from those who know you best—at work, at home, anywhere. The true measure of your brand is the reputation others hold of you in their hearts and minds. Ask them what your core strengths are.
Developing Your Brand

Brand is defined as what other people say about you on two dimensions.

1. Capability-this typically points to your skill set, your expertise or your domain knowledge. This dimension focuses on what you are known for.

2. Personae-this dimension is more descriptive of who you are and how you show up for others.

What did you hear in the feedback you received on executive presence?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

How would you like others to describe you on the two dimensions noted above?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

In 6-12 months what are a couple descriptors you would like to hear people use when referring to you/ your brand?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
Leadership and Ethics

Define “ethical leadership” and note an example of ethical behavior?

What are a couple important principles you hold dear?
Ethics Definitions

The word ethics comes from the Greek ethos:

- The distinctive character, spirit, and attitudes of a people, culture, era, etc. (Collins English Dictionary - Complete & Unabridged 10th Edition 2009) ©

Ethics is also defined as:

- 1: A discipline dealing with good and evil and with moral duty 2: moral principles or practice (Merriam Webster Dictionary, 1998)

- A system of accepted beliefs which control behavior, especially such a system based on morals (Cambridge Dictionaries Online, 2010)
Assignment:
Read p.1-7 and p.13-32; IV. University Admissions Process; University of Illinois-Urbana Champaign

Context
In 2009 the University of Illinois at Urbana Champaign, a campus with 32,000 undergraduate students, 10,500 graduate students and 3,000 faculty, was alleged to have created a “shadow admissions” track for applicants who had influential sponsors. The individuals applying to the University through what would become known as the “Category I” channel would not have been admitted through the competitive process all other prospective students needed to follow.

The principals in this case study were:
University President Joseph White
UIUC Chancellor Richard Herman
Associate Provost for Enrollment Keith Marshall
University Government Relations Terry McLennard
Dean of the Law School, Heidi Hurd
Board of Trustees

The underlying issue in this case is NOT whether these University leaders did something improper. Rather, the focus is on what influences leaders to behave in ways that any observer would quickly concede crosses the line. What induces intelligent people in positions of authority to engage in unethical behavior? You have been assigned one of the parties in this case. Your group will be asked to look at the part this person played and what might have influenced the individual’s behavior at our session.
Part I

What were the pressures this person was experiencing?

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What interests did this individual have?

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What rationalization do you think this person used to explain his/her behavior?

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________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
Part II

What allows good leaders to engage in or enable unethical behavior or decisions?

What standards can we use to make decisions?

To whom are we responsible?
Mind Games that Get in the Way


When faced with challenging decisions, leaders who have not internalized a value system that includes universally accepted values will probably respond with more variability than others who have. When a leader does not have an internalized value system, common mind games may cause an otherwise good person to make unethical decisions.

#1: Quickly Simplify – “Satisficing”

When we are confronted with a complicated problem, most of us react by reducing the problem to understandable terms. We simplify and search for a solution that is both satisfactory and sufficient. Leaders consider the essential elements of a problem without taking into account all of its complexities. This process, called “satisficing,” can lead to solutions that are less than optimal or even ethically deficient.

#2: The Need to be Liked

When the desire to be liked overpowers business objectivity, ethical lapses can occur. Such a situation is particularly acute for those recently promoted within the same organization. Such an overriding desire to be liked can adversely affect the ethics of people in an organization and also decrease the bottom line.

#3: Dilute and Disguise

In trying to strike a diplomatic chord, leaders can disguise the offensiveness of unethical acts by using euphemisms or softened characterizations. Regardless of whether people want to be seen as kinder and gentler, or just politically correct, this process merely helps wrongdoers and those associated with them get away with unethical behavior. Such softened characterizations serve to reduce the anxiety of the leader, but these euphemisms are dishonest. They serve to dilute and disguise unethical behavior. The antidote is for leaders to talk straight and to avoid euphemistic labeling or re-characterizing of unethical behavior.
#4: Making Positive

Unethical behavior appears more ethical by comparing it to worse behavior. Such justifications for unethical behavior are not valid. The tendency to diminish misdeeds by making a dishonest comparison also contributes to sustaining unethical conduct. While behavior may often legitimately be compared to that of others, when ethical transgressions are involved, relativity does not excuse ethical lapses.

#5: Overconfidence

By indulging in overconfidence, leaders can discount others’ perceptions and thus easily overlook the insights and talents of other people. Without benefit of input from those around them, overconfident managerial leaders may be blind to the most appropriate ethical choices in given circumstances and may consider only their own ideas regarding the best course of action. Accepting input from other people will improve the manager’s decision-making ability generally, including those issues that involve ethical consideration. Applied broadly, this practice will positively impact the ethical problem-solving climate within the entire organization.

### How to Make Better Ethical Decisions

| Quality          | • Consider the full spectrum of consequences  
|                  | • Accurately assess the risks  
|                  | • Be attuned to the pitfalls of egocentric biases.  

| Breadth          | • Consider the consequences for all stakeholders, not only in the present but also in the future.  

| Honesty          | • If an idea wouldn’t stand the scrutiny of public opinion, then it is probably a bad idea  
|                  | • Be as aware as possible of what leads you to your decisions.  

Session 4: Talent Management and Continuing Your Leadership Journey

Day Three

Thursday, September 17, 2015
Meeting Location: The Graduate Club, The Great Room, 155 Elm Street, New Haven, CT 06511

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00 am</td>
<td>Continental Breakfast</td>
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<tr>
<td>8:30 am</td>
<td>Opening Comments</td>
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<tr>
<td>II</td>
<td>MOR Maxims</td>
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<tr>
<td>III</td>
<td>Continuing Your Leadership Journey</td>
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<td>IV</td>
<td>A Perspective on Leadership</td>
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<td>V</td>
<td>Leadership Lessons</td>
</tr>
</tbody>
</table>

**Continental Breakfast**

**Opening Comments**
Overview on the Agenda
Reflections on Yesterday’s Session
Leadership Journeys: Beth, Gonzalo, Heather

**MOR Maxims**
An Overview on the Key Concepts

**Continuing Your Leadership Journey**
Leaders Help Shape the Future, So How Will You Shape Yours?
What Goals Will You Continue Working On?
What is Your Leadership Mantra?
Practices that Support Staying Resilient

**A Perspective on Leadership**
Gaspare LoDuca, Vice President and CIO, Columbia University in the City of New York

**Leadership Lessons**
GRADUATION/ LUNCH
Welcome/Introductions
What We Have Learned
How We Have Applied What We Have Learned
How You Can Leverage This Investment – What We Want You To Know
Presentation of the Certificates
Remarks from the Sponsors
Closing Comments
Reflections Practice

What are the take-aways you have from yesterday?

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
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________________________________________________________________________________
________________________________________________________________________________

Name one on-the-job application of what you listed.

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

INTERNALIZATION  DISCOVERY  ACCUMULATION
AHAS  APPLICATION

REFLECTION
Taking Stock

What skills and habits have you added to your repertoire this year?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

What skills or habits do you want to internalize in the coming months?

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__________________________________________________________________________

What didn’t you get to that was important for your development this year?

__________________________________________________________________________

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What are ways you could continue your development in the year ahead?

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__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
360° Competencies

Competencies Covered in the MOR Leaders Program

1. Strategic Thinking
Creates strategies and plans by anticipating future trends and linking them to the mission

2. Differentiating Leadership from Management
Recognizes the leader’s focus is on the future, being more strategic while the manager’s focus is on the tactical and execution. Most roles involve both responsibilities. Developing practices to support leading versus doing is a theme.

3. Change Management
A change agent; champions and promotes change; engages the efforts of others to bring about improvements

4. Communication
Creates an understanding of the leader’s role as communicator, focuses on presence, presentation and the ability to convey a message.

5. Shared Leadership
Broadly shares & delegates both responsibility and accountability

6. Working Across the Organization; Developing Partnerships
Knows how to get things done through formal and informal networks; a team player; shares resources to benefit the greater good, collaborates

7. Exercising Influence
Consistently assesses what influence styles would be beneficial to use in different situations to achieve the support needed to move an change initiative or project forward.

8. Results Orientation
Pursues goals and works hard to achieve them, consistently provides business results while maintaining the appropriate concern for people

9. Develops People
Motivates & provides challenging tasks and assignments to individuals & teams to build appropriate skills and competencies
10. Coaching
Equips their direct reports with the tools necessary to answer their own questions and take more ownership, forges trusting relationships

11. Self-Awareness (Knowledge)
Seeks feedback; knows personal strengths, weaknesses, opportunities and limitations.

12. Ethical Behavior
Recognizes the importance of character, building trust and a clear ethical compass

12. Courage
Encouraged to take initiative, speak up, step up, face up to tough situations and people problems in a timely fashion, learns how to ask for, receive and give constructive feedback.

14. Political Savvy
Maneuvers through complex political & organizational situations effectively, recognizes political stakeholders and their interests

15. Emotional Intelligence
Takes greater responsibility for being more intentional, self managing behavior to be professional and purposeful. Recognizing the importance of empathy and relationship building.
LEADERSHIP FRAMEWORK

Who You Are Matters
- Presence
- Character
- Ability to Connect
- Build Relationships
- Emotional Intelligence
- Leadership Philosophy
- Ethical Compass

What Leaders Do
- Communicate
- Set Strategic Direction
- Exercise Influence
- Engage People in Change
- Talent Management
- Deliver Results

The Leader’s Toolkit
- Lead, Manage, Do, Construct
- Prioritizing and Delegating
- Scan - Vision - SWOT
- Leading Change Strategies
- 3 Lenses: Strategic, Political, Cultural
- Coaching for Results
- Developing People, 9-Box Model
- 4 I’s: Building Relationships
- 4 E’s: Presence
- 4S’s: Improvisation

Context Matters
MOR Maxims

Make Mindfulness a Habit.
» Be Intentional

Be a Leaderful Presence.
» Take Initiative, Step Up

Focus on the Important.
» Prioritize, Delegate, Develop

Leaders Are Strategic.
» No Amount of Tactics Will Make up for a Lack of Strategy

Leaders Create the Desired Future State.

Relationships are Currency.
» Initiate, Inquire, Invest, Influence

Look Through 3 Lenses Strategic, Political, Cultural
» Remember: Culture Eats Strategy for Breakfast

Leaders Are Always on Stage.

The Answer is in the Room.

Leadership is About Doing the Right Thing.

Remember: When it Comes Time to Sit it Out or Dance... 

Dance.

Feedback is a Gift.
Mantra | mantra | noun
A mantra is a commonly repeated word or phrase. The word is derived from ancient Sanskrit and contains two words – “man” meaning “mind or thought”, and “tra” meaning “tool or to shape”. Hence the literal translation is “a tool to shape the mind”.

The only true definition is the experience you receive when you effectively use a mantra. Mantras are used to maintain focus, set intentions, or to strengthen your resolve. Pay attention to what you say to yourself and how that might impact your experience. Effective leaders have mantras to help guide them through rough times.

Examples of Mantras and their intent:

<table>
<thead>
<tr>
<th>Mantra</th>
<th>Intent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Be Where You Are</td>
<td>Stay present in the moment.</td>
</tr>
<tr>
<td>Leaders Are Always on Stage</td>
<td>People are always watching.</td>
</tr>
<tr>
<td>Leadership Matters</td>
<td>Most organizations are over managed and under led.</td>
</tr>
<tr>
<td>Leaders Do the Right Thing</td>
<td>Both strategically and ethically - leaders make the right choices.</td>
</tr>
</tbody>
</table>

“There is nothing like returning to a place that remains unchanged to find the ways in which you yourself have altered.”

Nelson Mandela
Developing Your Leadership Mantra

What were the leadership lessons that hit home?
What were some of the aha’s you had during the leadership program?
What comes back to you as a key takeaway from the program?
Write down these thoughts under “What Matters Most?”

<table>
<thead>
<tr>
<th>What Matters Most?</th>
<th>What Do You Want to Internalize?</th>
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</thead>
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</table>
### What Is Your Mantra...

<table>
<thead>
<tr>
<th>What Matters Most?</th>
<th>What Do You Want to Internalize?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Be Intentional:</strong></td>
<td>Leverage my talent and my time to maximize the value I add.</td>
</tr>
<tr>
<td></td>
<td>Know my strengths and limits; play to my strengths.</td>
</tr>
<tr>
<td><strong>Presence Matters:</strong></td>
<td>&quot;What you generate when you show up, the attitude you demonstrate, the way you conduct yourself.&quot;</td>
</tr>
<tr>
<td></td>
<td>Bring positive energy into the room.</td>
</tr>
<tr>
<td><strong>Be Intentional in Making Time for the Important:</strong></td>
<td>Focus on the priorities. Be proactive. Write out the important every Monday morning, tame the immediate; delegate the others.</td>
</tr>
<tr>
<td><strong>Develop the People Around Me:</strong></td>
<td>Provide direct reports with opportunities to step up, take on new challenges, and receive feedback and recognition.</td>
</tr>
<tr>
<td><strong>Be Mindful:</strong></td>
<td>Be self managing, be purposeful, and make the most of the interactions.</td>
</tr>
<tr>
<td><strong>Be Authentic:</strong></td>
<td>People perceive when someone is phony. Be genuine.</td>
</tr>
<tr>
<td><strong>Being Self-Aware:</strong></td>
<td>Emotional self-awareness - Recognize your emotions and their impact on you and others.</td>
</tr>
<tr>
<td></td>
<td>Recognizing your hot buttons so that you can change your behavior real time.</td>
</tr>
<tr>
<td></td>
<td>Knowing your strengths and limits; playing to your strengths.</td>
</tr>
<tr>
<td><strong>Build Relations; Relationships are the “Coin of the Realm”:</strong></td>
<td>Take advantage of the opportunities to make connections. Look for ways to extend my network beyond the immediate domain.</td>
</tr>
<tr>
<td><strong>Being Optimistic:</strong></td>
<td>People are more willing to follow you and give an extra effort for a winner.</td>
</tr>
<tr>
<td><strong>Leaders Focus on the Future:</strong></td>
<td>Keep a list of strategic issues, work on outlining the future, and engage others.</td>
</tr>
<tr>
<td><strong>Exercising Influence is Key:</strong></td>
<td>Expand my repertoire to encompass 3 additional influence strategies: common vision, empowering others, and bargaining.</td>
</tr>
<tr>
<td><strong>Emphasize Results:</strong></td>
<td>Set goals for each year. Start each quarter with a discussion regarding key results, identifying with staff the milestones or measures and who owns the major goals. Review past quarter and repeat.</td>
</tr>
<tr>
<td><strong>Take Initiative:</strong></td>
<td>Step up when needed, find a major initiative to lead or collaborate on.</td>
</tr>
</tbody>
</table>

... that you focus on the strategic, not the immediate

... because people are watching, all the time
A Perspective on Leadership

Gaspare LoDuca, Vice President and CIO, Columbia University in the City of New York
## Resiliency Scorecard

Rate your current state regarding resiliency

<table>
<thead>
<tr>
<th></th>
<th>Definite Challenge</th>
<th>Needs Improvement</th>
<th>Do Okay</th>
<th>Do Effectively</th>
<th>Define Strength</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can handle changes well.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Am effective at not getting pulled into negative or cynical mindsets.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Bounce back from disappointments quickly.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>When weighed down by something, have ways to work the issue.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Have a circle of people who are helpful.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Have specific ways to jettison baggage.</td>
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<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>Have a regular routine for physical exercise.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Have interests outside work that engage me.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Am able to maintain a positive outlook.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Have spiritual or religious practices that nourish me.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Feel centered much of the time.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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</tr>
<tr>
<td>Find my energy level to be a plus.</td>
<td>☐</td>
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<td>☐</td>
</tr>
</tbody>
</table>

What are some things you do currently that help you be more resilient?
Finding Balance

You

Family and Friends

Pursuits
<table>
<thead>
<tr>
<th>Spiritual</th>
<th>Supports Me</th>
<th>Close Friends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helps nourish the soul</td>
<td>Is there for me</td>
<td>People to be with</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People Who Nurture</th>
<th>People to Play/Have Fun with</th>
</tr>
</thead>
<tbody>
<tr>
<td>Those who nurture me/People I nurture</td>
<td>Creative, Enjoy, Laugh</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Learning</th>
<th>Coaches/Challenges</th>
<th>Mentoring / Professional or Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Helps me grow</td>
<td>Helps me think about an issue, keeps me honest</td>
<td>Helps me look to the future</td>
</tr>
</tbody>
</table>
Building Resilience

What are actions you can take to practice resilience every day?

[Blank lines]

What strategic commitments will you make to take care of/nourish yourself?

[Blank lines]
Graduation

GRADUATION/ LUNCH

Welcome

Introductions

What We Have Learned?

How We Have Applied What We Have Learned?

Suggestions on How Can Your University Leverage This Investment?

Presentation of the Certificates

Remarks from the Sponsors

Adjourn
Artist: Lee Ann Womack
Song: I Hope You Dance Lyrics

I hope you never lose your sense of wonder
You get your fill to eat
But always keep that hunger
May you never take one single breath for granted
God forbid love ever leave you empty handed
I hope you still feel small
When you stand by the ocean
Whenever one door closes, I hope one more opens
Promise me you’ll give faith a fighting chance

And when you get the choice to sit it out or dance
I hope you dance
I hope you dance

I hope you never fear those mountains in the distance
Never settle for the path of least resistance
Living might mean taking chances
But they’re worth taking
Lovin’ might be a mistake
But it’s worth making
Don’t let some hell bent heart
Leave you bitter
When you come close to selling out
Reconsider
Give the heavens above
More than just a passing glance

And when you get the choice to sit it out or dance
I hope you dance
(Time is a real and constant motion always)
I hope you dance
(Rolling us along)
I hope you dance
(Tell me who)
(Wants to look back on their youth and wonder)
I hope you dance
(Where those years have gone)

(Tell me who)
I hope you dance
(Wants to look back on their youth and wonder)
(Where those years have gone)
Notes: KEEP A RUNNING LIST OF YOUR “AHA’S”
Notes:


