

# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## PLAYBOOK: SESSION ONE

**Session Length: 75 – 90 minutes**

### ***10 minutes, Welcome***

- Leader welcomes group and shares vision/purpose.
- Group members briefly introduce themselves.

### ***5 minutes, Overview Experience***

- Discuss expectations around confidentiality and commitment.
- Circulate confidentiality agreement.

### ***40-60 minutes, Introductions***

- Individual introductions (10 minutes per person), select one of the “getting to know you” exercises suggested in this chapter.
- Encourage group members to ask questions to learn more about the individual.
- Debrief the exercise by exploring the common areas within the group. How has this exercise shifted the energy in the group? Was anyone skeptical about doing this at first? How have your feelings changes (if at all)? How might we use an exercise like this with our teams?

### ***5 minutes, Next Meeting***

- Confirm next meeting location, timing, and details.
- Discuss any pre-reading that may be required.

## PLAYBOOK: SESSION TWO

**Session Length: 80 – 95 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***45-60 minutes, Peer Coaching***

- Select 2 to 3 challenges based on time available.

***10 minutes, Session Debrief***

- What worked in our peer coaching session?
- What coaching skills would you like to work on for next time?
- How might you use this coaching structure with your teams?

***10 minutes, Wrap Up***

- Discuss next session pre-work.
- Each person share one key commitment to be completed by next session.

## PLAYBOOK: GENERAL SESSION

**Session Length: 70 – 90 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***40-60 minutes, Individual Goal Share – 15 minutes per person***

- Peer Learning session or Peer Coaching session (two issues).

***10 minutes, Reflection***

- What "aha" moments have you gained from this session?
- What worked well with the group coaching?
- What could you do better/differently next time?

***5 minutes, Wrap up***

- Discuss next session pre-work (group decides).
- Each person shares one key commitment to be completed by next session.

## PLAYBOOK: VALUES SESSION

**Session Length: 70 – 90 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***45-60 minutes***

- Where are your values currently aligned with the work you're doing?
- Where are you feeling a values "rub" or disconnect?
- What can you do to create more alignment between your work and your values?
- How might you use this exercise with your team?

***10 minutes***

- Discuss next session pre-work.
- Each person shares one key commitment to be completed by next session.

***5 minutes***

- Wrap up.

## PLAYBOOK: STRENGTHS SESSION

**Session Length: 70 – 90 minutes**

### ***5 minutes***

- Leader welcomes group.

### ***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

### ***45-60 minutes***

- Each individual to share one strength statement (zone of genius area).
- Group provides feedback – what they liked about each statement, plus one thing they could do to strengthen their statement and get clearer.
- Review reflection questions.

### ***10 minutes, Reflection***

- How could you bring more of your zone of genius to your work?
- How will you help others tap into their strengths at work?
- What are the potential pitfalls to a strengths-based approach?

### ***5 minutes, Wrap Up***

- Discuss next session pre-work (brand).
- Each person shares one key commitment to be completed by next session.

## PLAYBOOK: BRAND SESSION

**Session Length: 70 – 90 minutes**

### **5 minutes**

- Leader welcomes group.

### **10 minutes**

- Group provides updates on one success and one learning since the last meeting.

### **45-60 minutes, Boost Your Brand Discussion**

- Share personal brand statements.
- Group provides feedback – what did you like about the individual's statement, plus what is one thing they could do to strengthen their statement?

### **10 minutes, Reflection**

- What can you do to build your brand inside and outside your organization?
- How can you maintain consistency in all your actions (and inaction) with your brand?
- What networks do you want to expand your brand into?
- Where can you inspire, contribute, and share your expertise to build your brand?
- How will you revisit and refine your brand as you/your career evolves?

### **5 minutes, Wrap Up**

- Discuss next session pre-work (group decides).
- Each person shares one key commitment to be completed by next session.

## PLAYBOOK: CAREER VISION SESSION

**Session Length: 75 – 95 minutes**

### **5 minutes**

- Leader welcomes group.

### **10 minutes**

- Group provides updates on one success and one learning since the last meeting.

### **40-60 minutes, Individual Goal Share – 15 minutes per person**

- 5 minutes: Read retirement vision to group.
- 5 minutes: Share BHAC Vision.
- 5 minutes: Group Q&A to help each group member dig deeper and get really specific about their vision.

### **10 minutes, Reflection**

- How easy/hard was it to create your career vision?
- What was it like to share this vision out loud with the rest of the group?
- What changes/adjustments (if any) do you want to make to your career vision?

### **10 minutes, Wrap up**

- Discuss next session pre-work (goal setting).
- Each person shares one key commitment to be completed by next session.



## PLAYBOOK: GOAL SETTING SESSION

**Session Length: 75 – 90 minutes**

### ***5 minutes***

- Leader welcomes group.

### ***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

### ***40-60 minutes, Individual Goal Share – 15 minutes per person***

- 5 minutes: Recap BHAC Vision.
- 5 minutes: Share top 3 goals.

### ***10 minutes, Reflection***

- What did you notice about the goals that the group shared?
- Were there commonalities or differences?
- How would you like the group to support you in your goals?
- What is one thing you would like to accomplish around your goals between now and your next group session?

### ***5 minutes, Wrap up***

- Discuss next session pre-work.
- Each person shares one key commitment to be completed by next session.

## PLAYBOOK: WRAP UP SESSION

**Session Length: 80 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***30 minutes, Group Appreciation – 5 minutes per person***

- Individual appreciation feedback.

***30 minutes, Group Reflection – 5 minutes per person***

- What did we gain from this experience personally?
- What did we gain from this experience professionally?

***5 minutes, Wrap up***

## Tips for Running Virtual Peer Communities

*Peer coaching is a rich experience where participants are required to use both effective listening and observation skills. When you take your sessions to a virtual platform, here are some best practices to ensure your virtual peer coaching experience is engaging and successful.*

### The Technical Details

Select a platform where you can see everyone.

- Choose your technology. Some suggestions: Zoom, Microsoft Teams, Skype, Google+ Hangouts.
- Ensure that the group members have created their accounts and tested the platform prior to the virtual meeting.
- Send out the log-in details and confirm the meeting at least two days prior.

### Not Your Average Conference Call

To have a successful virtual experience for your entire coaching community, remember your commitment to being prepared and bringing your experiences to the table. It may be easier to sit back or multi-task when you're not all in the room together but the quality of everyone's experience decreases if members aren't fully "there".

- Find a location that is quiet, where you won't be disturbed
- Shut down/remove all possible distractions (email, phone, that deadline that's looming)
- Give yourself time to mentally "clear your agenda" so you can focus on the call
- If conference calling, on paper, draw a 'table' that shows everyone's name so you can take notes, keep track of the conversation etc.

# The Grassroots Leadership Revolution

## Up Your Communication Skills

When we connect with our groups on video or old school conference calls, we can miss important (and sometimes very subtle) cues when a member is sharing a pressing issue. Here are some tips to help remove ambiguity from your communications. Share these ideas with your coaching group.

- Put some structure around how you'll get people involved. Ask for a volunteer to kick things off but then be a bit more directive and work your way around the video screen to call on subsequent participants.
- Encourage members to name their emotions when they're sharing challenges or opportunities in the group – "I'm upset about this..." vs. "I have a situation with a peer..."
- Listen closely for emotion, tone, pace and energy...what are you hearing?
- Use names when directing questions to individuals which will prevent either total silence or everyone talking at once
- Check your group temperature frequently to ensure everyone feels involved (Give "one word" for how you are feeling? Rate your engagement from 1-10)
- Make sure your webcam is positioned so you are making eye contact with the rest of your coaching circle
- Bring your energy and enthusiasm to the call, pay attention to your body language – it affects your voice too
- And, if you're on a conference call, use your name each time you start to speak

## Build Connection and Trust

Whether your group meets in person or virtually, it takes time to build trust and go through stages of team development to get to 'high performance' as a group. Here are a few ways to accelerate the trust process in a virtual environment:

- Use trust building exercises outlined in the Grassroots Leadership Revolution book to accelerate getting to know each other
- Revisit trust activities when new members join your group
- Allow some time for small talk or have a quick "opener" for each coaching session (What Netflix program are you currently bingeing? What news story caught your interest recently?)
- Consider ramping up the frequency of your meetings in the early stages to accelerate trust
- Reach out to members of your group individually to get to know them better

## Confidentiality Agreement

I understand that discussions with my Peer Coaching group members will remain confidential and I will not discuss or share any information with anyone including colleagues, friends, family members or significant others.

I further agree to take due care to safeguard all action plans or other material entrusted to me by group member(s) and/or any invited guests and will not share this material without their express permission.

I understand that I remain fully and solely responsible for any and all personal and business decisions made during my participation in my peer coaching group.

Dated at \_\_\_\_\_, this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

---

Name (please print)

Signature

## Getting to Know You

These activities can be used anytime you want to deepen relationships within your peer group.

NOTE: All the "Getting to Know You" activities require advance preparation. Give your group members at least one week's notice so they can put thought into what they feel is important to share.

### Personal Collage Activity

**Materials:** 8 1/2 X 11 paper and art supplies, as chosen, or complete a digital version. If your program is virtual, the collage should be saved as a PDF or JPG file which can be screen shared during the session.

**Instructions:** Create a personal collage that represents important information about you, such as:

- People important to you
- Locations that are significant to you
- Activities with you are as associated
- Personal traits that characterize you and that will be helpful to your group
- Your ambitions
- Talents and skills that you have as a leader
- Your values
- Anything else you think is an important part of you

**Tips:** You don't have to be a professional artist to complete this activity. This is a get acquainted activity, not a contest.

Feel free to use other materials to construct your pictograph; magazine pictures, photos, crayons etc.

Have fun and enjoy the process of creating your personal statement.

# The Grassroots Leadership Revolution

## Object of Significance Activity

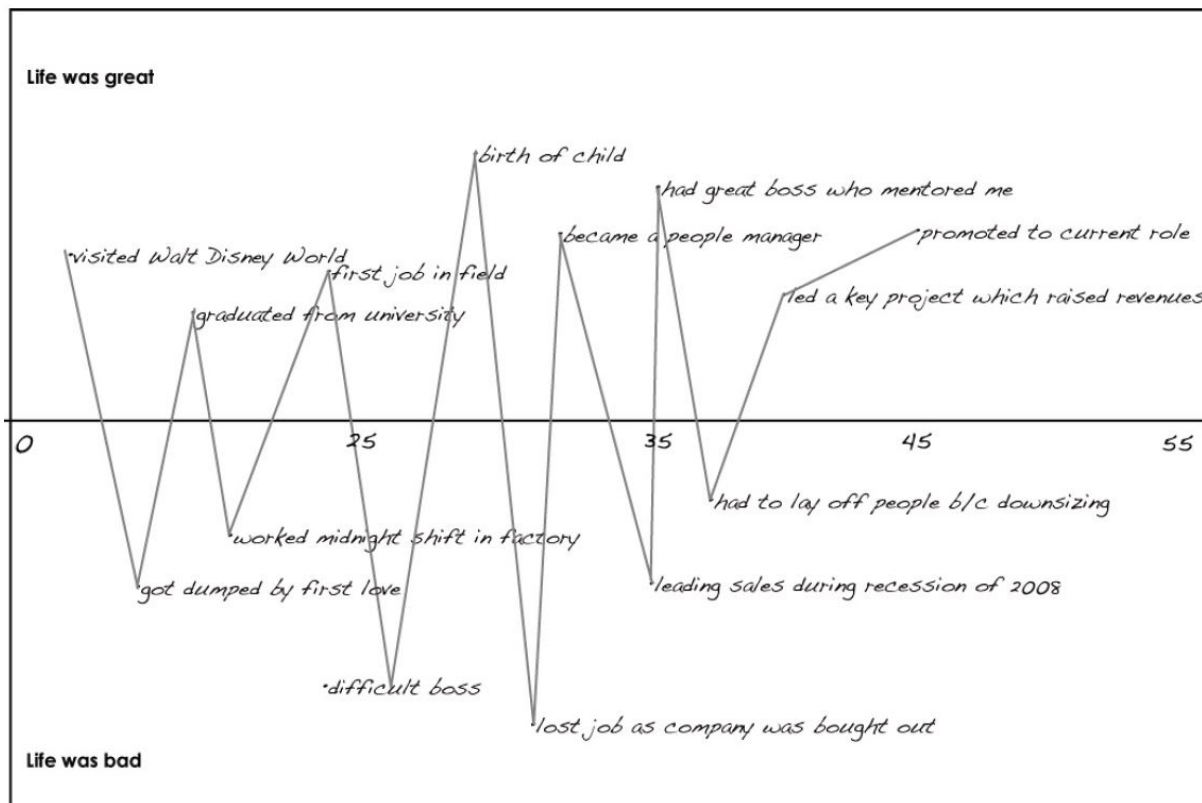
**Instructions:** Bring in an object of significance from home to share with the group. Perhaps you have a story to tell around its significance or why it matters to you.

## Lifeline Activity

**Instructions:** The Lifeline exercise allows you to showcase key moments in your life...both personally and professionally...that represent your various highs or lows.

The events could be large or small. The only criteria are they were significant and memorable to you. Share as much as you feel comfortable with.

Grab a piece of paper and draw a horizontal line with age markers from birth to where you are now. Above the line 'life was great'. Below the line 'life was bad'. See the sample below:



# The Grassroots Leadership Revolution

## Getting to Know You Facilitation Tips

- Time is always a challenge so be sure to set the time expectation up front. Using the stopwatch/alarm clock on your phone can be helpful. Let members know how you will flag if they are running out of time.
- When people are sharing important details of their lives, you will need to be a little flexible with timing as you don't want to rush or interrupt as they describe a key event in their lives, that's why it's so important to set the time expectation up front.
- To set a high bar for vulnerability right at the beginning, we recommend that the group facilitator goes first. This will role model being candid as well as respecting the time limit

## Getting to Know You Debrief Tips

- Encourage curiosity and questions from the group. Take the lead by asking questions.
  - Ask the group what they noticed or learned about their group members. What stood out? What did the group have in common? What surprised them?
- Encourage members to take notes on each group member for future follow-up conversations



## PLAYBOOK: SESSION ONE

**Session Length: 75 – 90 minutes**

### ***10 minutes, Welcome***

- Leader welcomes group and shares vision/purpose.
- Group members briefly introduce themselves.

### ***5 minutes, Overview Experience***

- Discuss expectations around confidentiality and commitment.
- Circulate confidentiality agreement.

### ***40-60 minutes, Introductions***

- Individual introductions (10 minutes per person), select one of the “getting to know you” exercises suggested in this chapter.
- Encourage group members to ask questions to learn more about the individual.
- Debrief the exercise by exploring the common areas within the group. How has this exercise shifted the energy in the group? Was anyone skeptical about doing this at first? How have your feelings changes (if at all)? How might we use an exercise like this with our teams?

### ***5 minutes, Next Meeting***

- Confirm next meeting location, timing, and details.
- Discuss any pre-reading that may be required.

# The Grassroots Leadership Revolution

## Powerful Peer Coaching Questions

### Alternatives

- What are the possibilities?
- If you had your choice, what would you do?
- What are possible solutions?
- What if you do and what if you don't?

### Appraisal

- What do you make of it all?
- What do you think? (is best?)
- How does it look to you?
- How do you feel about it?

### Background

- What led up to \_\_\_\_\_?
- What have you tried so far?
- What do you make of it all?

### Clarification

- What do you mean?
- What does it look/sound/feel like?
- What seems to confuse you?

### Description

- What was it like?
- What happened?
- Then what?

### Evaluation

- In what way?
- How does this fit with your plans/way of life/values?
- What do you think?

### Exploration

- Would you like to brainstorm this idea?
- What are other angles you can think of?
- What is just one more possibility?

### Example

- For instance?
- Like what?
- Such as?

### Extension

- What else?
- What other ideas have you thought of?

### Failures/Preparation for

- What if it doesn't work out the way you wish?
- And if that fails, what will you do?
- How do you want it to be?

### Fun, Lighten Up

- What was fun about \_\_\_\_\_?
- What was humorous about the situation?
- How can you find a way to have it be fun?
- How do you want it to be?

### Hypothetical

- If you could do it over again, what would you do differently?
- If it were you, what would you have done?
- How else could a person handle this?
- If you could do anything you wanted, what would you do?

### Identification of issues

- What seems to be the trouble?
- What seems to be the main obstacle?
- What is stopping you?
- What concerns you the most about \_?

### Implementation

- What will you have to do to get the job done?
- What support do you need to accomplish \_?
- What will you do?
- By when will you do it?

# The Grassroots Leadership Revolution

## Involvement

- What was your part in this?
- How do you fit into the picture?
- What were you responsible for?

## Information

- What information do you need before you decide?
- What do you know about it now?
- How do you suppose you can find out more about it?
- What kind of picture do you have right now?

## Integration

- How do you explain this to yourself?
- What was the lesson/learning?
- How can you lock it (the learning) in?
- How would you pull all this together?

## New Start

- If you had free choice in the matter, what would you do?
- If the same thing came up again, what would you do?
- If we could wipe the slate clean, what would you do?
- If you could do it over again, what would you do?
- How do you fit into the picture?

## Opening

- What would you like to focus on today?
- What would you like coaching on today?
- What would you like to explore today?

## Planning Outcomes

- What do you want?
- What is your desired outcome?
- If you got it, what would you have?
- How will you know you have received/reached it?

## Perspective

- What would you like to be doing five years from now?
- In the bigger scheme of things, how important is this?
- What do you plan to do about it?
- What is your game plan?
- What kind of plan do you need to create?
- How do you suppose you could improve the situation?

## Predictions

- How do you suppose it will work out?
- What will that get you?
- Where will this lead?
- What are the chances of success?

## Relation

- If you do this, how will it affect \_\_\_\_\_?
- What impact will that have on balance/values?
- How does this affect the whole picture?
- What else do you need to take into consideration?

## Taking Action

- What action will you take? And after that?
- What will you do? When?
- Where do you go from here? When will you do that?
- What are your next steps? By when?

## Summary

- How is this working? How is this going?
- How would you describe this?
- What do you think this all amounts to?
- How would you summarize the work/effort so far?

This list of powerful questions is courtesy of the Coaches Training Institute. For information on their various training programs, visit [www.coactive.com](http://www.coactive.com).

## Peer Coach Facilitator Play by Play

### Your role as Mentor Coach

- See yourself as the “guide on the side” versus the “sage on the stage”
- Bring in a high amount of positive energy and keep the flow lively and on time
- Pay attention to all of your group – notice their energy, ensure all members get equal airtime, that they follow the peer coaching method, that their input is succinct
- Your group will expect you to manage the group and process in a diplomatic way

### New to This?

- Recruit a timekeeper to keep you on track
- Post the peer coaching steps on a flipchart (if in person) or email in advance (if virtual)
- Focus on your group members rather than trying to participate in the peer coaching questions and mentoring
- Be prepared

### Preparing to Facilitate a Peer Coaching Session

STEP ONE	
<b>HEADLINE: Members share a specific challenge and opportunity.</b>	<i>Each group member provides a '1 minute' headline to outline their issue.</i>
<ul style="list-style-type: none"><li>• Remind the group to give you the top-line on their peer coaching challenge</li><li>• Use the 'headline' sign to gently move a member to be succinct</li><li>• Write the coaching topics on a flipchart so it's easy to refer to</li><li>• Time permitting, you may be able to do more than one topic depending on the complexity</li><li>• It's more important to do a thorough coaching on one topic than rushing through two topics</li><li>• Allow about 20 minutes on average for a peer coaching topic</li></ul>	

# The Grassroots Leadership Revolution

## STEP TWO

**SELECT: Group members prioritize the challenges/opportunities they would like to bring to the group.**

*Group votes to decide which person's topic/issue will be selected. Consider:*

- Time sensitivity
- Complexity of challenge (is it too broad/too early to discuss?)
- Readiness of the individual to participate
- Shared opportunity (e.g. if someone hasn't had a turn yet)

- Note if any of the topics have the same theme – sometimes handling one topic, will also serve another group member with the same challenge
- First ask if the situations have a timeline or heightened importance to the group member
- Ask if any of the group members have not had a chance to be peer coached
- Ask the group if any of the topics are particularly interesting or would be helpful to do (NOTE: only allow a minute or so for input)

## STEP THREE

**SHARE: The selected group member shares their challenge/opportunity in more detail.**

*The selected group member is given 5 minutes to share the key elements of the situation.*

- Ask the member to share information about what they have tried, key players, what has worked, where they feel stuck, etc.
- Ask the member what specific aspect of the challenge/opportunity they would like to be coached on

## STEP FOUR

**COACH: Other group members engage in coaching questions to deepen their understanding of the member's situation.**

*Group members ask coaching questions (no advice or suggestions) to uncover root issues.*

Tips for questions:

- Allow some context questions but the focus is on helping the person being coached to explore their challenge by asking diverse questions (i.e. What outcome do you want? What are you worried about? What do you think should be your next step?)
- Listen for leading questions, longer questions tend to be leading
- Open ended questions
- Listen for solutions disguised as questions ("Have you tried X?" versus "What have you tried?")
- Encourage the group to reword any questions that are leading or are solution-based to a "coaching question"

# The Grassroots Leadership Revolution

- When the energy goes down or questions become repetitive quickly confirm that there are not more questions and move to **Step Five**

Coaching the person:

- Listen for signs that the coachee is starting to explore their situation (i.e. "Hmm, that's a good question!", "I hadn't thought about that.")
- Look for shifting body language that may identify that there's a place for more exploration questions
- Save your questions until the end and ask only if 1) your question wasn't asked by the group and 2) you feel there was a line of questioning that was missed

## STEP FIVE

**CONFIRM: Confirm with the member in the coaching seat where they would specifically like support.**

*After 10 minutes of questions, check in with the selected member to see what, if anything, has shifted for them and where they would like some mentoring support from their peers.*

- Often, the original issue can shift once questions are asked
- If you are unclear, ask the member "Where do you want your group's help today?"

## STEP SIX

**MENTOR: Group members may now share experiences, observations, and insights to provide support to help.**

*During this stage, the member is no longer allowed to speak or react instead, they are encouraged to take notes and listen. The group can now provide feedback to help the individual build their action plan. The key is that members should speak from personal experience and not "finger wag" by listing off a variety of "should dos." Use the language, "in my experience." Providing support and encouragement is also welcomed at this stage.*

- The coachee is encouraged not to speak but instead used a pen and paper to take notes
- Remind the group to keep their mentoring succinct so that the coachee can get as many ideas as possible to take away (use the "bottom line" hand signal)
- The longer the suggestion, the more likely it's being "sold" to the coachee
- If the coachee wants to comment or ask a question, ask them to do so after the session is done
- Don't allow any group members to comment on the advice being given – the person being coached is completely capable of deciding how to handle their situation
- Once the energy lulls, confirm that all mentoring ideas have been shared and move to the next stage

# The Grassroots Leadership Revolution

## STEP SEVEN

**REFLECT: The member being coached can now share their feedback and reactions to the experience.**

*The member being coached can now share their feedback and reactions to the process.*

- The member is sharing specific comments on the overall effectiveness of the experience
- Asking "What was your experience on the hot-seat?" directs the member to comment on what it was like being coached versus giving a critique of the suggestions received
- Thank the group for their participation
- Generally (not individually) give recognition if you heard a good question, diverse perspectives and saw that the process was followed

# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>



## PLAYBOOK: SESSION TWO

**Session Length: 80 – 95 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***45-60 minutes, Peer Coaching***

- Select 2 to 3 challenges based on time available.

***10 minutes, Session Debrief***

- What worked in our peer coaching session?
- What coaching skills would you like to work on for next time?
- How might you use this coaching structure with your teams?

***10 minutes, Wrap Up***

- Discuss next session pre-work.
- Each person share one key commitment to be completed by next session.

## PLAYBOOK: GENERAL SESSION

**Session Length: 70 – 90 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***40-60 minutes, Individual Goal Share – 15 minutes per person***

- Peer Learning session or Peer Coaching session (two issues).

***10 minutes, Reflection***

- What "aha" moments have you gained from this session?
- What worked well with the group coaching?
- What could you do better/differently next time?

***5 minutes, Wrap up***

- Discuss next session pre-work (group decides).
- Each person shares one key commitment to be completed by next session.

# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

# The Grassroots Leadership Revolution

## Discover Your Values

Review the list of values below and identify your:

**"A" values** - These are **A**bsolutely critical to me, no matter the situation.

**"B" values** - These are **B**eneficial, but more situational.

**"C" values** - **C**ould live without these values because they're so not me.

Note that our objective in this exercise is to begin to get to the heart of what is really important to you, no matter what situation you may be encountering.

Ability	Competition	Fun	Mastery
Achievement	Contribution	Generosity	Prestige
Adventure	Cooperation	Helpfulness	Public Contact
Aesthetics	Creativity	Growth	Recognition
Authenticity	Decision-making	Health	Security
Authority	Dependability	Independence	Self-control
Autonomy	Duty	Influence People	Self-knowledge
Challenge	Excitement	Integrity	Spiritual Fulfillment
Change	Family	Justice	Stability
Commitment	Friends	Knowledge	Teamwork
Compassion	Flexibility	Leisure	Work Alone
Compensation	Freedom	Loyalty	Work Under Pressure

## My Top Four Values

Now look at all your "A's" and highlight your **"4 Core"** - these are the four most important values that drive, motivate and inspire your actions, decisions and behaviours.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

# The Grassroots Leadership Revolution

## How Do Your 4 Core Values Show Up?

**Step 1:** In column 1, list your four core values.

**Step 2:** In column 2, identify how these values show up for you both personally and professionally.

Core Value	What does this value look like in action (at work, at home)?

## Your CORE Values and What They Mean to You

Core Value	What do these values mean to you professionally and personally?

### Keep your values top of mind and out front:

- Self-reflect regularly. (What did I do or learn today about applying my values?)
- Explore your organization's and your boss's values to find alignment with yours.
- Practice your values stories and speak up.

## Aligning Values at Work: Stop, Start, Continue

Part of what helps us be authentic in the workplace is how closely our work aligns to our existing core values. Consider each of your 4 CORE values and what you are doing at work that does and/or does not support it. Consider what actions you can take to better align your work to each of these values. Remember, your core values are non-negotiable so look to elements of your work life that if shifted, will enable you to work in harmony with those values.

**STEP ONE:** List Your Core Values across each column

**STEP TWO:** Record your answers to the three questions for each value

	How is my current job or workplace supporting this value?	How is my current job or workplace not supporting this value?	What actions can I take to get better alignment to this value (at work or outside)?
Core Value 1:			
Core Value 2:			
Core Value 3:			
Core Value 4:			

# The Grassroots Leadership Revolution

**What have you learned about how your work is aligned to your values? How can you maintain this?**

**What will you commit to doing differently? What can you do to fulfill your values outside of work if there's a gap?**



# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## PLAYBOOK: VALUES SESSION

**Session Length: 70 – 90 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***45-60 minutes***

- Where are your values currently aligned with the work you're doing?
- Where are you feeling a values "rub" or disconnect?
- What can you do to create more alignment between your work and your values?
- How might you use this exercise with your team?

***10 minutes***

- Discuss next session pre-work.
- Each person shares one key commitment to be completed by next session.

***5 minutes***

- Wrap up.

## Explore Your Strengths

Reflect on some activities you've done over the past week that you have enjoyed and felt energized. They could be big or small. Just focus on what you were doing, who you were with and anything else that stands out for you.

**Example:**

I felt strong (in the zone, energized, happy, engaged) when I...  
*had a client meeting with our biggest customer to resolve delivery issues and we were able to come up with a win-win solution.*

I felt strong (in the zone, energized, happy, engaged) when I...

I felt strong (in the zone, energized, happy, engaged) when I...

I felt strong (in the zone, energized, happy, engaged) when I...

I felt strong (in the zone, energized, happy, engaged) when I...

# The Grassroots Leadership Revolution

## Dig Deeper

Based on the activities you've identified, what patterns do you notice?

**Example:** *My strength is my ability to stay calm in tense situations and leverage my strengths in seeing other people's perspectives and problem solving to find simple solutions that make us both happy.*

1.

2.

3.

### It's a strength because I...

- Consistently perform it at a high level
- Get high personal satisfaction from the activity
- Produce superior results when I use this strength
- Keep getting better the more I do it
- Feel "in the zone" and time just melts away

# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## PLAYBOOK: STRENGTHS SESSION

**Session Length: 70 – 90 minutes**

### **5 minutes**

- Leader welcomes group.

### **10 minutes**

- Group provides updates on one success and one learning since the last meeting.

### **45-60 minutes**

- Each individual to share one strength statement (zone of genius area).
- Group provides feedback – what they liked about each statement, plus one thing they could do to strengthen their statement and get clearer.
- Review reflection questions.

### **10 minutes, Reflection**

- How could you bring more of your zone of genius to your work?
- How will you help others tap into their strengths at work?
- What are the potential pitfalls to a strengths-based approach?

### **5 minutes, Wrap Up**

- Discuss next session pre-work (brand).
- Each person shares one key commitment to be completed by next session.

# The Grassroots Leadership Revolution

## Personal Brand Survey

Choose the top 10 words that immediately come to mind when you think about me. If there are other words you would like to use, write them in the blank spaces at the end of the list.

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> accomplished      | <input type="checkbox"/> dedicated       | <input type="checkbox"/> modest           |
| <input type="checkbox"/> adaptable         | <input type="checkbox"/> dependable      | <input type="checkbox"/> objective        |
| <input type="checkbox"/> adventurous       | <input type="checkbox"/> diplomatic      | <input type="checkbox"/> open minded      |
| <input type="checkbox"/> approachable      | <input type="checkbox"/> efficient       | <input type="checkbox"/> optimistic       |
| <input type="checkbox"/> ambitious         | <input type="checkbox"/> empathetic      | <input type="checkbox"/> organized        |
| <input type="checkbox"/> analytical        | <input type="checkbox"/> enthusiastic    | <input type="checkbox"/> persuasive       |
| <input type="checkbox"/> articulate        | <input type="checkbox"/> entrepreneurial | <input type="checkbox"/> practical        |
| <input type="checkbox"/> assertive         | <input type="checkbox"/> ethical         | <input type="checkbox"/> proactive        |
| <input type="checkbox"/> authentic         | <input type="checkbox"/> extroverted     | <input type="checkbox"/> professional     |
| <input type="checkbox"/> calm              | <input type="checkbox"/> focused         | <input type="checkbox"/> quiet            |
| <input type="checkbox"/> candid            | <input type="checkbox"/> fun             | <input type="checkbox"/> reserved         |
| <input type="checkbox"/> collaborative     | <input type="checkbox"/> informal        | <input type="checkbox"/> resourceful      |
| <input type="checkbox"/> communicative     | <input type="checkbox"/> insightful      | <input type="checkbox"/> responsive       |
| <input type="checkbox"/> competitive       | <input type="checkbox"/> introverted     | <input type="checkbox"/> results oriented |
| <input type="checkbox"/> confident         | <input type="checkbox"/> intuitive       | <input type="checkbox"/> shy              |
| <input type="checkbox"/> courageous        | <input type="checkbox"/> knowledgeable   | <input type="checkbox"/> strategic        |
| <input type="checkbox"/> creative          | <input type="checkbox"/> mediator        | <input type="checkbox"/> supportive       |
| <input type="checkbox"/> customer oriented | <input type="checkbox"/> methodical      | <input type="checkbox"/> thoughtful       |

Are there any other words (not on the above list) that you would use to describe me?

# The Grassroots Leadership Revolution

## Brand Statement Boosters

How many people describe themselves as "results driven professional"? Your brand statement shouldn't be a cliché or same-old. Your brand statement should reflect what makes you stand out from others. It's time to get out your dictionary or thesaurus and add some descriptive punch. Here's a word list to use or get inspired by. Circle the words that resonate with you. You'll know them when you see them.

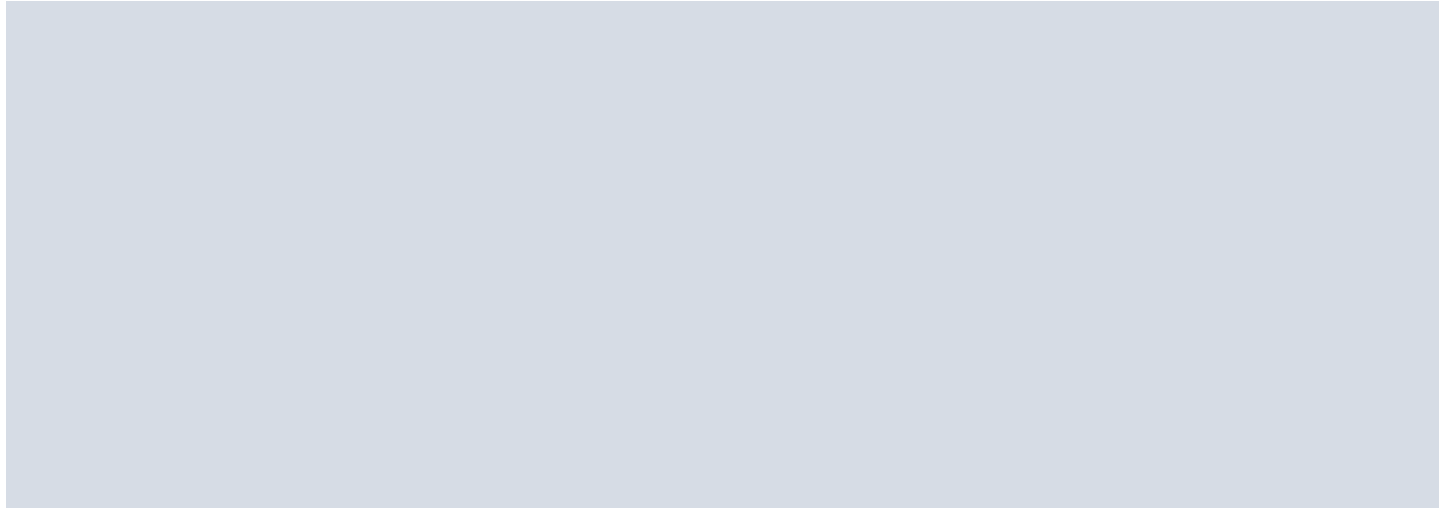
accelerator	connoisseur	genius	observer	rebel
activist	crafter	guardian	opportunist	revolutionary
adventurer	creator	inclusive	optimist	ringleader
advocate	cultivator	initiator	orchestrator	specialist
analyzer	dazzler	innovator	originator	standard-bearer
anarchist	detector	intentional	perceptive	stimulator
architect	diplomat	inspector	player	supporter
artist	discriminating	instigator	practitioner	surefooted
assessor	driver	inventor	precise	synthesizer
astute	dynamic	Investor	predictor	tireless
catalyst	encourager	loyal	producer	translator
challenger	energizer	maestro	progressive	trendsetter
change agent	enthusiast	maverick	protector	uncompromising
champion	entrepreneur	methodical	provocateur	unorthodox
cheerleader	experimenter	meticulous	purveyor	unruffled
collaborator	fearless	mixologist	quick starter	vigilant
compelling	fine tuner	motivator	questioner	watchdog
connector	futurist	navigator	realist	



# The Grassroots Leadership Revolution

Now that you have some descriptors, try putting together combinations. Think of WHAT you do and HOW you do it. For example, you might be known as the finance guru who can explain the complex to non-financial managers. If so, words like translator or navigator might be suitable.

What words or word combinations could you use in your brand statement? Jot down a few here.



# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## PLAYBOOK: BRAND SESSION

**Session Length: 70 – 90 minutes**

### **5 minutes**

- Leader welcomes group.

### **10 minutes**

- Group provides updates on one success and one learning since the last meeting.

### **45-60 minutes, Boost Your Brand Discussion**

- Share personal brand statements.
- Group provides feedback – what did you like about the individual's statement, plus what is one thing they could do to strengthen their statement?

### **10 minutes, Reflection**

- What can you do to build your brand inside and outside your organization?
- How can you maintain consistency in all your actions (and inaction) with your brand?
- What networks do you want to expand your brand into?
- Where can you inspire, contribute, and share your expertise to build your brand?
- How will you revisit and refine your brand as you/your career evolves?

### **5 minutes, Wrap Up**

- Discuss next session pre-work (group decides).
- Each person shares one key commitment to be completed by next session.

## Crafting a Kick Ass Career Vision

Here are key steps to reflect on to help you craft a career vision that truly resonates and provides purpose. Often we focus on our demanding present or immediate next career step. These exercises will open possibilities for the future and help you identify what fulfills you.

### Step One: Where are you now?

Inventory your skills and abilities

Think about the skills and abilities (what you do well) that got you to where are today and capture them below. Now think particularly of things that come naturally to you and that you enjoy doing, rather than those things you may be good at but don't enjoy. (Your Zone of Genius work from Chapter 9 is a great place to start.)

Skills and Abilities	Do I want to do more of this type of work/activity?	Would I rather do less of this type of work/activity?

What are some skills and abilities that you'd like to develop further?

# The Grassroots Leadership Revolution

## Step Two: Retirement Party Vision

What types of activities have you been doing during your final year before retirement? (Don't think about your title or where you're working, think about how you would be spending your days.)

What are people saying about your contributions at work?

What are people saying about your leadership style and impact?

How will you spend your days as a retired professional?

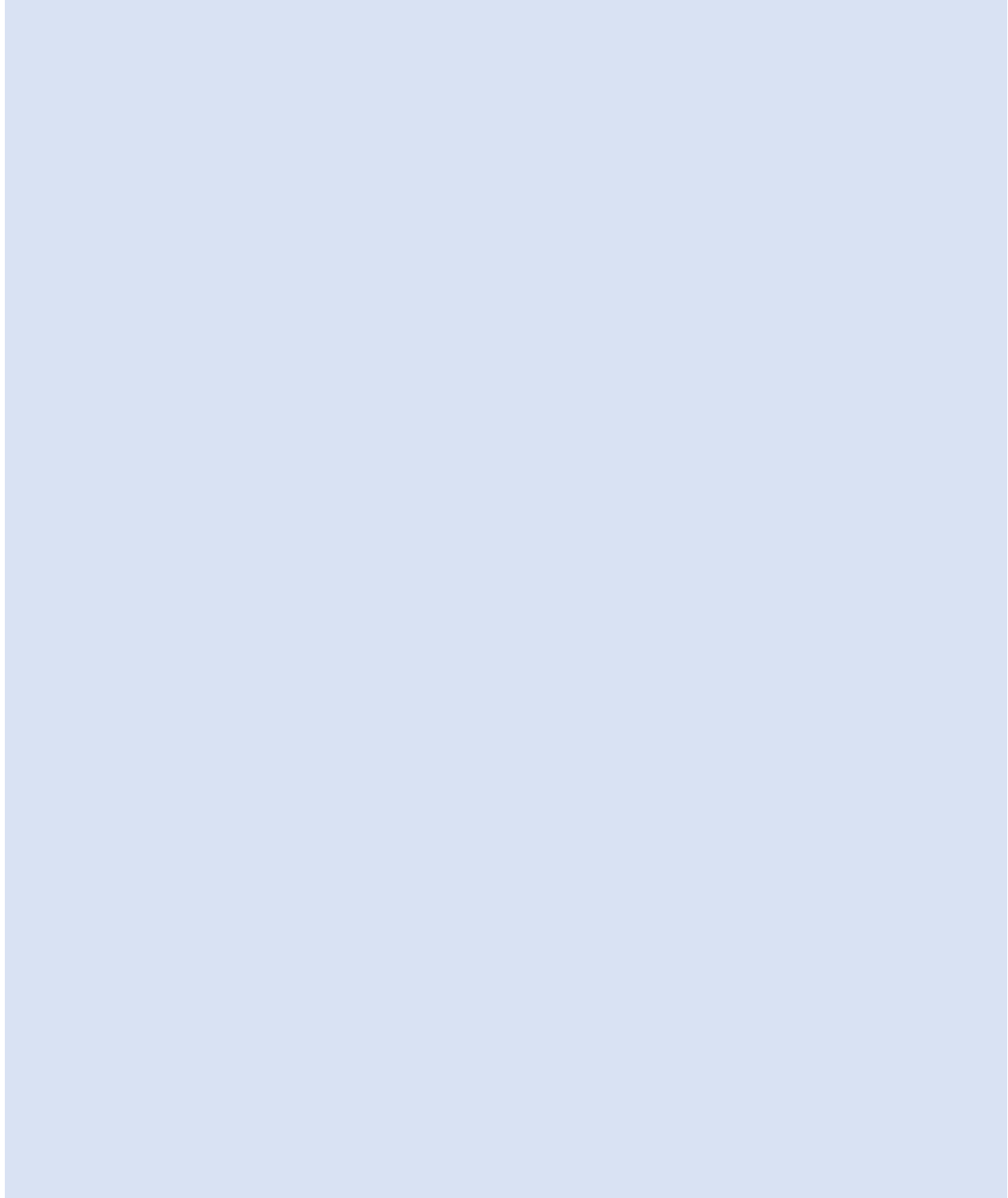
## Step Three: Your Big Hairy Audacious Career Vision

For this, we want to look 3 years out. Close enough that it's in sight but far enough away that we can implement our plans.

- Don't get stuck on HOW you will get there
- Push yourself out of your comfort zone – go big!
- Your work and life are interconnected – think of what you'll be doing outside of work as well as specific areas (e.g. type of work, financial reward, status, family, friends, health)
- Articulate it as if it's already happened

# The Grassroots Leadership Revolution

**My Big Hairy Audacious Career Vision:**



# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

## PLAYBOOK: CAREER VISION SESSION

**Session Length: 75 – 95 minutes**

**5 minutes**

- Leader welcomes group.

**10 minutes**

- Group provides updates on one success and one learning since the last meeting.

**40-60 minutes, Individual Goal Share – 15 minutes per person**

- 5 minutes: Read retirement vision to group.
- 5 minutes: Share BHAC Vision.
- 5 minutes: Group Q&A to help each group member dig deeper and get really specific about their vision.

**10 minutes, Reflection**

- How easy/hard was it to create your career vision?
- What was it like to share this vision out loud with the rest of the group?
- What changes/adjustments (if any) do you want to make to your career vision?

**10 minutes, Wrap up**

- Discuss next session pre-work (goal setting).
- Each person shares one key commitment to be completed by next session.



## Macro Leadership Goal Planner

Goal	
<ul style="list-style-type: none"> <li>• Building a leadership behaviour for your current or a future role</li> <li>• Strengthening an existing skill</li> <li>• Closing a skill, competency or performance gap</li> <li>• Completing or accomplishing specific activities</li> </ul>	
Action Step	
<ul style="list-style-type: none"> <li>• Reading a book – on own, discuss with your boss/team, book club format</li> <li>• Attending training that incorporates leadership behaviour</li> <li>• Tapping into a subject matter expert or behavioural role model</li> <li>• Partnering or mentoring with someone who is building reciprocal behaviours (e.g. Person A is high strategic and low innovative, Person B is the opposite)</li> <li>• Leading or becoming a member of a special taskforce or project</li> <li>• Being part of implementing a new organization initiative</li> <li>• Working in another unit for a short period of time</li> <li>• Attending specific meetings as an observer where exposure to people and subject matter will help you develop that skill or behaviour</li> <li>• Teaching a training class</li> <li>• Supervising an individual who possesses a skill/behaviour you want to improve on</li> <li>• Getting involved with a committee/network (internally or externally)</li> </ul>	
Potential Challenges	Strategies/Resources
<ul style="list-style-type: none"> <li>• Time</li> <li>• Commitment level to goal</li> <li>• Distractions</li> <li>• Changes in current work priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Peer group</li> <li>• Internal support structures</li> <li>• Boss expectations</li> <li>• Personal support systems</li> <li>• Accountability methods</li> </ul>
Goal Evaluation Method	Dates
<ul style="list-style-type: none"> <li>• Feedback from specific individuals</li> <li>• Performance appraisal</li> <li>• Self-assessment</li> <li>• Action steps completed on time</li> </ul>	

# The Grassroots Leadership Revolution

## Macro Action Plan Template

Goal	
Action Step	Completed by
Potential Challenges	Strategies/Resources
Goal Evaluation Method	Dates

## Feedforward Primer

The best way to engage others in your behaviour change is to solicit FeedForward from your stakeholder group. FeedForward was popularized by Marshall Goldsmith, author of *What Got You Here, Won't Get You There* and is a positive, motivating way to get clarity on specific actions that matter to your stakeholders.

### Why FeedForward?

1. You will get specific examples of what good looks like for both macro and micro behaviours.
2. You are resetting the framework that people use to view you, they will start looking for your behaviour change.
3. Demonstrating vulnerability and being open to the insights of others is critical to personal growth and development.

# The Grassroots Leadership Revolution

## The Roundtable™ Approach to FeedForward

FeedForward Step	Notes and Guidance
<b>1. Identify Your Stakeholders</b>	<ul style="list-style-type: none"><li>• Make a list of people whose opinions regarding your behaviour are crucial (peers, boss, team).</li><li>• Select individuals who you've worked with for at least 3 months. Remember you're building a coalition of supporters who will see the change and whose opinion matters!</li></ul>
<b>2. Share Your Big Bang for the Buck Behaviour Goal™</b>	<ul style="list-style-type: none"><li>• Let the individual know what behaviour you are working on in clear and simple terms.</li></ul> <p>(E.g.: "I would like to improve my listening skills.")</p>
<b>3. Ask for 1 or 2 Suggestions</b>	<ul style="list-style-type: none"><li>• Ask for actions that you can take to demonstrate the specific behaviour. Suggestions should be VERY specific and VERY tactical.</li><li>• Ask for 1 or 2 ideas maximum per person.</li><li>• Write down the suggestions.</li></ul> <p><b>Confused? Here's a sample conversation:</b></p> <ul style="list-style-type: none"><li>• "Hi, (insert name), I'm doing some work on my own leadership style and I'd like to get your thoughts. I'm planning to work on how I can be a better listener."</li><li>• "What's one thing that I could SAY that would demonstrate this behaviour?"</li><li>• "What's one thing that I could DO MORE of that would demonstrate this behaviour?"</li><li>• "What can I START doing that would demonstrate this behaviour?"</li></ul>
<b>4. Say "Thank-You" without comments</b>	<ul style="list-style-type: none"><li>• Thank the person and write down the idea for further reflection.</li><li>• Do not comment on the suggestions received.</li></ul> <p>Why no comments? Because this is about being open and receiving comments without judgement. Receive the comments, reflect and use it for your action plan.</p>
<b>5. Repeat</b>	<ul style="list-style-type: none"><li>• Complete steps 2-4 with one stakeholder, move to the next person on the list and repeat the FeedForward process.</li></ul>
<b>6. Consolidate</b>	<ul style="list-style-type: none"><li>• Review the suggestions and identify which ones you would like to add to the action plan.</li></ul>

# The Grassroots Leadership Revolution

## Organize Your FeedForward Suggestions

Use this template to organize your FeedForward input and to brainstorm words that come to mind as you think of this behaviour. (Below are a couple of examples for what someone could say and do to demonstrate better listening).

SAY MORE	DO MORE
<i>E.g.: "I'd really like to hear your ideas on this."</i>	<i>E.g.: Remove my phone from meetings to stay focussed on what's being said.</i>

Knowing what to do is the first part. Actually putting these ideas into action is the harder part. Check out our Daily Top 5 Resource for tips on moving from ideas to action.

# The Grassroots Leadership Revolution

## Micro-behaviour Worksheet

### Best practices for using your Daily Top 5 Tracker:

- Your Daily Top 5 must be actionable – What can I SAY or DO to demonstrate this behaviour?
- Spend time on the vocabulary – what words will you use to highlight the behaviour? It may seem obvious but if you are upping your feedback, then your stakeholders should be hearing “feedback” often.
- Check your agenda every morning and set an intent about where you will demonstrate your behaviour. For example, “Today I have 2 one-on-ones where I can give feedback.”
- It may be uncomfortable to start, but with daily practice comes increased confidence and competence
- You will likely derail back to your old behaviours on occasion. Be forgiving and persist.
- Bring your Top 5 to life - post your list of questions somewhere visible. Some examples - on your desktop, the front of your agenda, add a question a day to your calendar on repeat, use an app that sends you reminders
- Check in with your stakeholders every 2 months (FeedForward) and adjust your questions as necessary

### Daily Top 5™ - SAMPLE

**Behaviours I am tracking:** *Be more collaborative*

**Words that I will say:** *work together, understand your needs, collaborate, cooperate, team up, working in partnership, harmonize, pool resources, mutual effort, build consensus*

**Did I try my best to...**

Question	Day 1	Day 2	Day 3	Day 4	Day 5
<i>Tell a colleague that I am looking for opportunities to collaborate.</i>					
<i>Accommodate someone else's needs and, did I communicate this to them?</i>					
<i>Ask for input, advice or an opinion from someone on my team, my peers or my boss.</i>					
<i>Acknowledge input, advice or an opinion from someone on my team, my peers or my boss.</i>					
<i>Ask someone to work in partnership with myself or my team.</i>					

# The Grassroots Leadership Revolution

Behaviours I am tracking:

---

Words that I will say:

---

---

Tip: Make copies and complete weekly

Did I do my best to...	Insert a Yes or No for each day				
	Monday	Tuesday	Wednesday	Thursday	Friday

# The Grassroots Leadership Revolution

## Progress Check-In

Reflect on your progress since your peer coaching session...

Based on my previous commitments, I completed or made progress on...	
What I'm most proud of:	What I've learned from my actions:
Things I need to do next to make progress against my goals:	What I want to get out of this session:

### My Commitments

Before the next session, I will:

Activity	Initiated	Completed
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>



## PLAYBOOK: GOAL SETTING SESSION

**Session Length: 75 – 90 minutes**

### ***5 minutes***

- Leader welcomes group.

### ***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

### ***40-60 minutes, Individual Goal Share – 15 minutes per person***

- 5 minutes: Recap BHAC Vision.
- 5 minutes: Share top 3 goals.

### ***10 minutes, Reflection***

- What did you notice about the goals that the group shared?
- Were there commonalities or differences?
- How would you like the group to support you in your goals?
- What is one thing you would like to accomplish around your goals between now and your next group session?

### ***5 minutes, Wrap up***

- Discuss next session pre-work.
- Each person shares one key commitment to be completed by next session.

## Reflection & Appreciation Worksheets

### Part 1 - Review

What have I gained from being part of this peer group over the past year?  
Professionally...

Personally...

# The Grassroots Leadership Revolution

## Part 2 - Reflect

Over the course of this experience, you and your fellow group members have worked closely together. Each of you has brought something special to the group. Take some time to reflect on what you have appreciated about each of your fellow group members and how each member of the group impacted your experience i.e. what did you learn from them, what did you take away from the experience, etc. and come in with some concrete feedback to each member. Example:

**Rather than:** *XXX. I really appreciated your jokes. You made me laugh.\**

**Make it concrete:** *XXX. I really appreciated how you brought humour into our group. You managed to lighten the mood and shifted our perspective on some negative situations. It made me realize that sometimes I take things too seriously and would benefit with lightening up a bit for myself and for my team. Thank you.\**

Member	What I appreciate about you is

# The Grassroots Leadership Revolution

Member	What I appreciate about you is

# The Grassroots Leadership Revolution

## Part 3 - Refocus and Renew

What goals will you focus on moving forward?

What behaviours/habits that you've learned through your group coaching experience are you committed to continuing?

What will you do to maintain momentum around your goals and progress?

## PLAYBOOK: WRAP UP SESSION

**Session Length: 80 minutes**

***5 minutes***

- Leader welcomes group.

***10 minutes***

- Group provides updates on one success and one learning since the last meeting.

***30 minutes, Group Appreciation – 5 minutes per person***

- Individual appreciation feedback.

***30 minutes, Group Reflection – 5 minutes per person***

- What did we gain from this experience personally?
- What did we gain from this experience professionally?

***5 minutes, Wrap up***