

The *Next* Level

GROUP DISCUSSION GUIDE



For Facilitators

How To Use This Guide

As a facilitator for a group discussion program on *The Next Level*, you can help yourself and your colleagues make the changes needed to succeed when new results are expected. This guide will help you and the group develop insights and action steps to do that.



Check-In

Each session begins with a “Check-In” where participants will reflect on what they learned or observed while practicing the “Your Next Step” exercise from the previous session.



Discussion

Each session includes a set of questions designed to stimulate thoughtful group discussion, generating new insights and personal discovery around the given topic. Don't worry about getting through each question - it's the quality of the dialogue that's important. To help you achieve the best outcomes from your discussions, here are some facilitation techniques to keep in mind:

- Guide the group through each question, encouraging open and honest dialogue.
- Establish confidentiality and mutual respect.
- Keep track of time to ensure the questions are covered in sufficient depth. Help the group stay focused on the task, avoiding side conversations and off-topic discussion.
- Encourage full participation and help to surface different perspectives and experience.
- Ask open-ended questions to further the discussion.



Your Next Step

“Your Next Step” exercises allow participants to practice one or more of the concepts from the discussion in each session. Be sure to allow enough time at the end of each session to explain the “Your Next Step” exercise and make it clear.

For Participants

How To Use This Guide

Welcome to the group discussion program on *The Next Level*. If you're like most leaders, the expectations around the results you're expected to achieve are continually changing. These different expectations can be driven by a promotion, an expanded scope in your current role or a changing operating environment. No matter what the reason is, you'll need to pick up some new behaviors and mindsets and let go of some old ones to get new results. This group discussion program will help you do that. Here's an outline of how the program will work:

Check-In



In this section, you will “check-in” with the group, reflecting on what you learned or insights you gained while practicing the “Your Next Step” exercise from the previous session.

Discussion



Each session includes a set of questions designed to stimulate thoughtful group discussion, generate new insights, and facilitate personal discovery.

Your Next Step



Each session will end with a “Your Next Step” exercise for you to complete between sessions.

Personal Journal



This guide includes pages for note taking, both during and between sessions. Use these to record your insights and experiences from the “Your Next Step” exercises.

Introduction

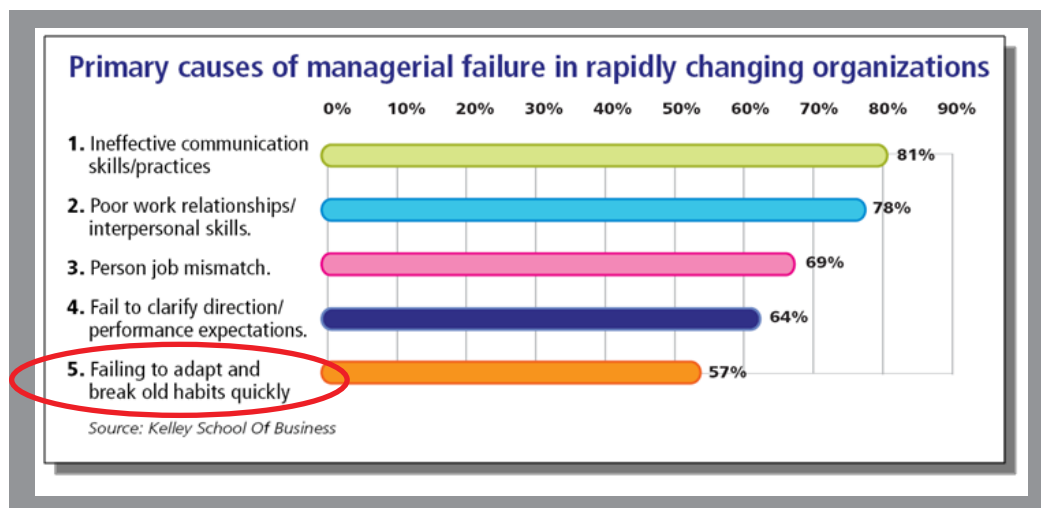
Welcome to The Next Level

Moving to the executive level is among the toughest transitions of any career. In fact, research shows that as many as 40 percent of new executives fail within eighteen months of being named to their positions. Executives are undoubtedly smart, capable people – so, why do so many of them fail?

“A new type of thinking is essential if mankind is to survive and move toward higher levels.”

- Albert Einstein

Today’s world is about constant change. To survive and succeed, we must adapt. In fact, research from the Kelley School of Business reveals that in addition to problems with communication and relationship building, failure at **The Next Level** often results from failing to adapt and break old habits.



As a leader, you will often find yourself leading in an environment where expectations about results have changed, regardless of whether those expectations have been clearly defined. When different results are expected on a regular basis, you must pick up new behaviors and let go of previously learned behaviors in order to adapt quickly and achieve results. This means that, in order to be successful, new leaders must have the courage and confidence to let go of some of the behaviors and actions that brought them to a leadership role in the first place.

“We are what we repeatedly do. Excellence, then, is not an act but a habit.”

- Aristotle

The Next Level identifies nine sets of key behaviors and beliefs that executives need to pick up and let go of in order to succeed. And, while it’s important to learn, practice, and adapt these principles, remember that big progress comes from small steps. We don’t need to put undue pressure on ourselves to do too many things at once.

Each session of this workshop will focus on one of the key “pick up and let go” distinctions from **The Next Level**. Between sessions, you’ll be given an action step to take each week that moves you closer to your goal. The “Your Next Step” exercises will allow you to practice and apply each “pick up” behavior in the context of your real-world work environment.

Exercise: Self-Assessment

Picking Up and Letting Go

On the rating scales below, assess your current level of confidence in each of the “pick up and let go” behaviors. For each one, think about the various perspective “buckets” and rate yourself in terms of

1. Personal Presence

2. Team Presence

3. Organizational Presence

A “5” rating on either end of the scale means this is how you show up all the time.

A “1” rating means you never show up this way. For further insights into each behavior, refer to the corresponding chapters in *The Next Level* - chapter numbers are indicated.

PICK UP



PERSONAL PRESENCE

LET GO OF



CONFIDENCE IN YOUR PRESENCE

DOUBT IN HOW YOU CONTRIBUTE

CHAPTER 2



REGULAR RENEWAL OF YOUR ENERGY AND PERSPECTIVE

RUNNING FLAT OUT UNTIL YOU CRASH

CHAPTER 3



CUSTOM-FIT COMMUNICATIONS

ONE-SIZE-FITS-ALL COMMUNICATIONS

CHAPTER 4



PICK UP



TEAM PRESENCE

LET GO OF



TEAM RELIANCE

SELF-RELIANCE

CHAPTER 5



DEFINING WHAT TO DO

TELLING HOW TO DO IT

CHAPTER 6



ACCOUNTABILITY FOR MANY RESULTS

RESPONSIBILITY FOR A FEW RESULTS

CHAPTER 7



PICK UP



ORGANIZATIONAL PRESENCE

LET GO OF



LOOKING LEFT, RIGHT, AND
DIAGONALLY AS YOU LEAD

LOOKING PRIMARILY UP
AND DOWN AS YOU LEAD

CHAPTER 8



OUTSIDE-IN VIEW OF
THE ENTIRE ORGANIZATION

INSIDE-OUT VIEW OF
YOUR FUNCTION

CHAPTER 9



BIG-FOOTPRINT VIEW
OF YOUR ROLE

SMALL-FOOTPRINT VIEW
OF YOUR ROLE

CHAPTER 10



Session 1

Advancing Through Uncharted Terrain



Get to Know Your Group Members

Take a few minutes to introduce yourself to your fellow group members by sharing:

1. Who you are.
2. What you do.
3. What you want to take away from this group discussion program.



Discussion

- 1 In your journey as a next level leader, what do you feel best about and what do you want to take a look at to be even better?
- 2 Who are the audiences that have a stake in your success? Write them down.
- 3 What do you think is expected of you as a leader?
- 4 What's different about what's expected of you now, compared to your last job or a year ago?
- 5 When you think about what's expected of you, what one to two leadership behaviors seem to be most important in meeting those expectations?



Your Next Step

Talk to some of the people in your work environment and ask them what behaviors they think are most important in your success as a leader. Asking for feedback from colleagues can be intimidating for you and them. To make the process a little easier, put the opening question in the third person. For example, ask, "What do you think are the most important traits or behaviors for leaders in roles like mine?" Make notes in your Personal Journal.

Session 2

PICK UP confidence in your presence

LET GO of doubt in how you contribute



Check-In

What did you learn from last week about the behaviors that your key audiences think are most important in your success as a leader?



Discussion

As a leader, the way you show up affects the way everyone else shows up. So, taking care of your confidence level is the first thing you need to pick up as a leader.

- 1 In what types of situations do you feel most confident?
- 2 In what types of situations do you feel least confident?
- 3 In either situation (most/least confident), what do you think the impact of that may be on you and the people you're leading?
- 4 In situations where you feel less confident, what are your favorite/most effective strategies to make yourself feel even more confident?
- 5 When you reflect on your career development, what positive experiences have you had that you can remind yourself of when you feel confident?



Your Next Step

Refer to the "What's Your Swing Thought?" **Coachable Moment** on **page 31** of *The Next Level*. Visualize and plan your performance during an important event on your calendar in the coming week. Use the following questions to guide yourself in the visualization and planning process. Make notes in your Personal Journal.

1. What's the outcome I'm trying to create? If the event or conversation is a total success, what happens as a result?
2. How do I need to "show up" to make that outcome likely? In addition to whatever I need to say, how do I need to carry myself in terms of body language, energy level, tone of voice, attentiveness and other factors?

Session 3

PICK UP regular renewal of your energy and perspective

LET GO of running flat out until you crash



Check-In

Share with the group what happened as a result of your visualization and planning process. What difference did it make in the actual event? What intentions do you have for continuing this exercise for key events in the future?



Discussion

In the age of 24/7 connectivity, it can be all too easy to run out flat until you crash. An important component of being a next level leader is regular renewal of your energy and perspective.

- 1 Think back to a recent period in your life when you were really happy or satisfied with your work performance. What words describe how you felt and/or behaved in that situation? Share your story with the group.
- 2 What routines do you currently have in your life that help you renew so that you show up at your best? Consider the domains of spiritual, mental, physical, and relational when you answer this question.
- 3 If you were to look out a year from now and consider what success looks like at work, home, and the community, what do you see? What are the outcomes you're trying to create in each of those three arenas?
- 4 Refer to the "Make the Most of Stillpoints" **Coachable Moment** on **page 37** of ***The Next Level***. What breaks do you take throughout your workday to give yourself your best opportunity to consistently show up at your best?
- 5 What triggers or signs let you know that it's time for you to take a break?



Your Next Step

This coming week at work, experiment with taking new forms of "still point" breaks. In your Personal Journal, write down what difference(s) these still point breaks made for you. How will you strategically use them in the future when a trigger tells you that you need a break?

Session 4

PICK UP custom-fit communications

LET GO of one-size fits all communications



Check-In

What difference did your “still point” breaks make last week? What was the impact of your energy, focus, and effectiveness as a leader?



Discussion

Custom-fit communications is about engaging people in a way that is both

1. Outcome Oriented
2. Audience Specific

For your communications to be most effective, you must be clear about your desired outcome, the audience for your message, and what it will take to move that audience toward your desired outcome. Effective leaders think strategically about their communications and consider where the audience is versus where they want them to be in terms of thought, feeling, and action.

- 1 What are some of the most important topics/issues that you’ve communicated about recently?
- 2 Who are the key individuals or audiences that you need to be engaged with in your day-to-day communications?
- 3 How does your energy level, tone of voice, and body language affect your communications?
- 4 Based on your answers to these questions, what changes do you think you need to make in the way you communicate?



Your Next Step

For an important issue that you’re working on next week, complete the What/So What/Now What worksheet on the next page for at least three stakeholder individuals or groups. Be ready to share with the discussion group in the next session how your custom-fit communications approach worked.

- **WHAT?** What do you want to tell them? What do you want or need to learn from them?
- **SO WHAT?** Why should it matter to them?
- **NOW WHAT?** What do you want them to know, do, or feel as a result of your communication?

Worksheet: Custom-Fit Communications

The communications issue is:

	AUDIENCE:		
WHAT?			
SO WHAT?			
NOW WHAT?			

NOTES

Session 5

PICK UP team reliance

LET GO of self-reliance



Check-In

Share with the group what you did to custom-fit your communications using the What? So What? Now What? framework and any observations you have on the difference it made.



Discussion

If you're like most leaders, you've gotten where you are because at some point in your career you were thought of as the "go-to person". Being a go-to person is a great way to advance in your career because you're known for getting things done. Being a go-to person, though, is great until it isn't. The challenge at ***The Next Level*** is to let go of being the go-to person and pick up the skill of building teams of go-to people.

- 1 Refer to the **Coachable Moment** on **page 92** of ***The Next Level***. Given the role that you're in and the unique resources and opportunities that come with it, what are the things that only you can do?
- 2 Given the things that only you can do, what are the highest and best uses of your time and attention?
- 3 What's your assessment of the level of clarity between you and your team on your goals, roles and responsibilities, plans and processes, and interpersonal norms? Refer to the GRPI conversation on **pages 93-95** of ***The Next Level*** for some thought starters.
- 4 What's your take on your team's level of readiness to step up and be responsible for the actions that will be required to drive new results?
- 5 What coaching conversations do you need to have with members of your team in order to prepare everyone for future growth? Refer to the "Close the GAPS" **Coachable Moment** on **page 88** of ***The Next Level*** for more ideas.



Your Next Step

Use the GRPI model on **pages 93-95** of ***The Next Level*** to have a conversation with your team to determine the level of clarity on at least one of the following four elements:

- Goals
- Roles and Responsibilities
- Plans and Processes
- Interpersonal Norms

Session 6

PICK UP defining what to do

LET GO of telling how to do it



Check-In

Last week, you discussed the GRPI model with your team to determine the level of clarity on at least one of the four elements. What difference did that discussion make? What new insights do you have?



Discussion

When you think about your own development as a professional and a leader, there have probably been times in your career when you've had to take on tasks or jobs that you didn't feel ready for. When you look back on those moments, you likely realize that much of your development came when the "what" you were supposed to do was clear, but the "how" wasn't as clear. Your learning and development came from figuring out the "how." As a manager, you have the opportunity to create those kinds of development experiences for your team. Free yourself to do the things that only you can do while developing a skillful, experienced team that will move you toward success in the future.

- 1 In your role, what are the sources of perspective on the "what's" that you have access to that others do not? (e.g. meetings or conversations).
- 2 What do you do to share or transfer your unique perspective to your team? What are you not doing that could be done?
- 3 Think of a time in your career when your development took a quick and dramatic leap forward. What was the situation or assignment that led to this development? Share your story with the group.
- 4 How clear was the "what" in that situation? Did you get a lot of direction on the "how"? What does that tell you about how you might develop your own team members?
- 5 Refer to "The Four P's" **Coachable Moment** on **page 104** of *The Next Level*. To prepare for a future "Four P's" conversation with your team, take time now to talk through your answers with your group.



Your Next Step

This week, use the GROW coaching approach described in the **Coachable Moment** on **page 109** of *The Next Level* to have a brief (8-10 minutes) coaching conversation with a member of your team.

Session 7

PICK UP accountability for many results

LET GO of responsibility for a few results



Check-In

Share what happened when you used the GROW model with a member of your team.



Discussion

When you're a go-to person moving up, one of the things that usually helps you move up is a high degree of responsibility for the things that need to get done. In this session, we'll talk about making the shift from responsibility to accountability.

- 1 What do "responsibility" and "accountability" mean to you?
- 2 Where are you in the process of letting go of taking satisfaction from doing the work yourself versus taking satisfaction from the accomplishments of your team members?
- 3 What systems and processes do you currently have in place to follow through on the tasks that you delegate? What other systems or processes could you implement to stay on top of what you're accountable for?
- 4 What kind of leadership behaviors make you feel comfortable, open, and honest in your communications with others? What behaviors do you need to exhibit to make your team feel open and honest with you so that they will openly share both successes and challenges?
- 5 How do you appropriately communicate the results that your team achieves to the people that need to know?



Your Next Step

Have a conversation with your team about their responsibilities, when they act on their own and when they should bring you in for guidance or direction.

Session 8

PICK UP looking left, right, and diagonally as you lead

LET GO of looking primarily up and down as you lead



Check-In

Talk about what you learned from the conversation about responsibilities you had with your team after the last session. Share with the group what else you think you need to do on that front.



Discussion

Good leaders are adept at looking up to what their boss wants and down to what their team needs. Great leaders don't limit themselves to just looking up and down; they scan and connect across the organization on a 360-degree basis. They establish relationships, not just up and down, but left, right, and diagonally as well.

- 1 When you look at the conversations you have on a regular basis, what's the ratio between up and down conversations, left and right conversations, and diagonal conversations? What changes do you need to make in your ratio and why?
- 2 What do you know about the expectations of peer-level individuals or groups in the organization that rely on you and your team for results? What else do you need to know?
- 3 What are you and your team working on that requires innovative thinking, collaboration, or expertise that you don't have? Who are you relying on for that kind of help? Where else should you be looking for help?
- 4 Refer to the "Go on a Listening Tour" **Coachable Moment** on page 138 of *The Next Level* and review the bulleted questions on pages 138-139. What other questions would you ask on a listening tour? What questions would you like to be asked if you were the subject of a listening tour?
- 5 When it comes to staying connected with the people on the front lines of your organization, what are your favorite techniques for "management by walking around"?



Your Next Step

Review the "Get and Be a Peer Coach" **Coachable Moment** on page 144 of *The Next Level*. Pair up with a member of your discussion group and commit to coaching each other on strengthening your organization network between now and the next session. Be sure to have your first peer coaching conversation before the next session. To get a running start, review and use the GROW model **Coachable Moment** from page 109 of *The Next Level* in your peer coaching conversation.

Session 9

PICK UP an outside-in view of the entire organization

LET GO of an inside-out view of your function



Check-In

Share what you learned or discovered in the peer coaching conversation you had last week.



Discussion

It's not uncommon for leaders on the rise to consider their agenda to be the most important agenda in the organization. In fact, that singular focus is what often helped get people promoted to where they are. Staying in that "me" mindset, however, is a recipe for failure at *The Next Level*. To succeed at this level, you quickly have to shift from a "me" mindset to an "us" mindset.

- 1 Avon's Lucien Alziari says that next level executives need to adopt a "business first, function second" mindset. When you think about the most important goals of your organization, what contributions do you make that have the biggest impact towards reaching those goals?
- 2 A common pitfall for next level leaders is to over-advocate for their own agenda. Take a look at the bullet points on **page 160** of *The Next Level*. Which of these warning signs sound familiar to you? What other warning signs should be on this list?
- 3 What do you do on a regular basis to ensure that your team understands the big-picture priorities of your organization? What else could you be doing?
- 4 The **Data Point** on **page 166** of *The Next Level* tells us that most managers think they could do a better job of building their external networks. When you look at the five steps to building your network in the **Coachable Moment** on **page 167**, identify one or two steps that you need to work on.
- 5 Taking an outside-in perspective requires regularly questioning your assumptions and practices. What are you doing on this front, and how often are you doing it?



Your Next Step

To expand your perspective of the entire organization, follow through on the "Take a Shadow Day" **Coachable Moment** on **page 164** of *The Next Level*. Between now and the next session, make a request of a peer-level or next level up manager and ask if they would be willing to have you shadow them for a day or half-day so you can learn what they do, how they do it, and the impact it has on the organization.

Session 10

PICK UP a big-footprint view of your role

LET GO of a small-footprint view of your role



Check-In

Tell the group who you intend to shadow and what kind of reaction or response you received from that person when you made the request. What are your next steps?



Discussion

When you take on a prominent leadership role, you're always on stage. Whether you know it or not, or like it or not, people are watching you. If you're intentional about it, you can use that visibility for good. If you're unintentional about it, it can bite you in a very big and ugly way. In this final session of *The Next Level* discussion group, we'll talk about your leadership footprint and all the other aspects of being on stage all the time.

- 1 When you were promoted to the managerial or executive level, what did you notice about how people treated you? Did things change? If so, how did they change?
- 2 Think of the best leader you've ever worked for. Share with the group the characteristics that made that leader so great. Think of the worst leader you've ever worked for. Share with the group the characteristics that made that leader so awful. When you look back, how did the best and worst leaders influence the team's performance?
- 3 What are the things that keep you from being present when you're in a conversation with a team member or peer? What steps could you take to keep those things from distracting you?
- 4 If you were your boss, what's the biggest thing you'd do first? What could you do to act on that now?
- 5 Review the **Coachable Moment** on page 187 of *The Next Level*. Share with the group what you want your legacy as a leader to be.



Keep Moving

Soliciting and acting on colleague feedback is a proven way to improve your performance as a leader.

To continue, enhance, and solidify the principles you've learned in this discussion program, use the steps outlined in Appendix A of *The Next Level* to create your own Executive Success Plan™ (ESP™).

Good luck with your journey to *The Next Level!*

