Strategic Leadership Type Indicator

SLTi

Facilitator's Manual

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Learning Objectives

Macro Learning Objectives for the Course

A. Become comfortable with the terms and concepts of strategic leadership by conversing and problem solving with a small group of peers, using these terms and concepts and completing activities based on them.

B. Increase your awareness of your own leadership habits and patterns of behavior to be better able to self-manage your leadership behaviors and develop your leadership practices in the future.

C. Increase your menu of possible leadership actions by learning from scripted cases and from your informal interactions with peers in the workshop.

D. Practice a practical three-step method for selecting an appropriate leadership strategy that will help you improve performance and develop employee capacity.

E. Feel more able and effective as a leader as you learn to approach your leadership challenges and opportunities strategically.

F. Become familiar with the classic managerial grid and its two dimensions: leadership focus on task and leadership focus on people.

G. Return to work with new insights, tools, and techniques, as well as some specific ideas and plans, to ensure that you are able to add more value as a leader in your workplace in the future.

Learning Objectives by Module

1. Introduction to Strategic Leadership

1A. Appreciate the importance of adjusting your leadership approach to reflect employee capabilities and desires.

1B. Describe the differences between management and leadership with an awareness of the role of the leader in influencing the development and performance of employees in positive ways.

1C. Take responsibility for leading by focusing on the varied performance needs of employees.

1D. Describe a range of leadership behaviors to expand your knowledge of the options available for helping employees perform.

1E. Learn to "drill down" to describe and understand leadership behaviors on a more specific and detailed level.

1F. Recognize the distinction between selecting a leadership behavior strategically (after assessing the situation) and out of habit. Realize that we often repeat ineffective leadership actions instead of making a strategic assessment of what is most likely to work.

2. Self-Assessment Using the *Strategic Leadership Type Indicator* (SLTi)

2A. Increase your sensitivity to the challenges of selecting an effective leadership action in the wide variety of cases that the workplace presents.

2B. Identify your tendencies toward using each of the four core leadership strategies (Instruct, Coach, Relate, Delegate) based on your beliefs about their effectiveness in 16 different short cases.

2C. Become familiar with the descriptions of the four leadership strategies in the SLTi self-assessment booklet, page 8.

3. Understanding Task and People Orientations

3A. Become familiar with the underlying dimensions of the SLTi model and earlier management grids.

3B. Recognize that in each leadership situation, the leader needs to make a strategic choice of whether to attempt to influence performance by focusing on the task, or on the people performing it. One or the other will be optimal in each situation.

3C. Learn to identify the focus of a leadership behavior (distinguishing between those with a focus on the task versus those with a focus on the person).

3D. Find out whether you have a natural tendency to focus on the task or the person when playing a leadership role in the workplace.

4. Interpreting Your Strategy Scores

4A. Learn to define the four leadership strategies as low and high combinations of the two underlying dimensions: leader's focus on the task and on the person.

4B. Identify your highest strategy score to understand what your natural tendency is as a leader and the strengths or advantages of it.

4C. Identify your lowest strategy score to understand where you will need to focus your efforts in order to develop your capacity as a leader.

4D. Appreciate the value of learning to "flex" your strategy or style as a leader to be able to respond effectively to more leadership situations.

4E. Calculate your flexibility score to find out how flexible your choice of strategy was in the SLTi cases.

4D. Recognize that it can be difficult to self-manage your leadership behavior because it is not always fully within conscious control.

5. Exploring the Strategies

5A. Describe accurately and be able to use the Instruct strategy.

5B. Describe accurately and be able to use the Relate strategy.

5C. Describe accurately and be able to use the Coach strategy.

5D. Describe accurately and be able to use the Delegate strategy.

5E. Design or provide feedback appropriate to each of the four strategies; use feedback to implement each strategy effectively.

6. Evaluating Strategic Needs

6A. Assess any employee or group of employees and their relationship to a task in terms of (a) how capable they are and (b) how strongly they desire to do the task.

6B. Select the most appropriate strategy based on this assessment of capability and desire to perform.

6C. Practice assessing employee needs and selecting a strategy, using job aids in the SLTi self-assessment booklet that you will take back to the workplace with you and be able to use later.

6D. Calculate your strategic effectiveness score to find out how often you chose the most appropriate strategy in the SLTi cases.

6E. Practice analyzing leadership situations using a three-step method that involves assessing employee capacity, selecting a strategy, and planning your implementation of the strategy with appropriate leadership behaviors.

7. **Implementing Your Strategy**

7A. Recognize that there are many ways to implement each of the four strategies and that the leader can increase their effectiveness by seeking creative and context-appropriate leader behaviors.

7B. Relate strategic leadership to the activities in Module 1 in which leader behaviors were explored and described in order to increase your awareness of the broad "menu" of options.

7C. Develop specific ideas for leadership actions you might use in your workplace, sorted into four categories based on the four leadership strategies.

8. **Developmental Leadership**

8A. Recognize that it is in the interests of the leader, the organization, and the employee to have employees moving toward higher levels of performance capacity so that the leader can delegate more and harder tasks to them over time.

8B. Relate long-term employee development goals to the short-term performance goals addressed by the leadership strategies so that you can see how to accomplish both sets of goals simultaneously.

8C. Practice identifying the key issue that holds back each individual employee in their development of higher levels of competence and commitment.

8D. Understand that each employee might need a different sequence of leadership strategies over time in order to develop, but that all employees can have their development needs met through appropriate selection and use of the leadership strategies.

8E. Understand the employee development cycle (as diagrammed on page 21 of the SLTi self-assessment booklet) and use it to advance employees to higher levels of performance.

8F. Appreciate the concept of offering "richer" tasks and jobs (through the principles of job enrichment) as a way to keep employees growing and developing in their work.

9. **Concluding Points and Activities**

9A. Review and solidify your understanding of the four leadership strategies and their use.

9B. Apply the diagnostic technique from Module 6 to yourself as a way of making progress on an important personal challenge or aspiration.

9C. Use strategic leadership to analyze the case of one of your own "difficult" employees and develop a better strategy and approach to helping this employee improve.

9D. Practice using the reproducible job-aid forms, Form C and Form M, in the SLTi self-assessment booklet so that you will feel comfortable using them in leadership challenges when you return to the job.

Course Design Options

Module	Half-Day Format	Full-Day Format
1. Introduction to Strategic Leadership	30 minutes	30 minutes
2. Self-Assessment Using the SLTi	30 minutes	30 minutes
3. Understanding Task and People Orientations	15 minutes	15 minutes
4. Interpreting Your Strategy Scores	30 minutes	45 minutes
5. Exploring the Strategies	60 minutes	60 minutes
6. Evaluating Strategic Needs	30 minutes	30 minutes
7. Implementing Your Strategy	15 minutes	15 minutes
Wrap-Up and Show Slide 60	5 minutes	
Appendix B: Case Analysis and Interpretation		60 minutes (optional)
8. Developmental Leadership		30 minutes
9. Concluding Points and Activities		40 minutes
Module Totals:	**3 hours, 35 min.**	**6 hours**
Recommended: 2–4 breaks @ 10–15 minutes each	(2) 30 minutes	(4) 60 minutes
Total Course Time:	**4 hours, 5 min.**	**7 hours**

Note: A three-quarter day format is preferred by the author. It follows the full-day format, *excluding* Appendix B. It usually runs all morning, inserts a lunch break after Module 6, and ends in mid-afternoon.

Course Design Options

Administration of *Strategic Leadership Type Indicator* (SLTi) Only—Total Time 1 hour

If you wish to administer the SLTi as part of another course, you may not want to use the many extra learning elements included in the half-day and full-day course options. You can use the SLTi, Part 1, *only* to diagnose individual participants' leadership strategy types (which equate generally with leadership styles in many courses that use the classic four-style management grid as their basis).

Part 1 of the SLTi takes under an hour to administer and generates strategy-type scores that equate fairly well with styles in many leadership courses and books based on the classic management grids (see Appendix C for details of these earlier models and studies). Table 1 on the following page shows some rough equivalencies to other commonly used names for strategies or styles.

Using the notes below, you can show *only* those slides from Workshop/Course Design that support the taking and scoring of the SLTi. Here is how to administer the SLTi using supporting slides that are specific to the administration of the instrument itself and independent of any of the other content in the course design.

Module 2 (Slides 11 through 14) covers the actual administration of the self version of the assessment instrument. It takes no more than a half-hour to administer the instrument and guide participants through the use of the two-part score forms to generate four scores for the four combinations of task and people orientations.

Next, skip to Slide 20 in Module 4, where you can guide participants as they enter their scores in their SLTi self-assessment booklets (on page 6). Slides 20 through 22 provide the minimum path for facilitating the entry of scores on page 6 of the SLTi self-assessment booklet. Participants should enter their four totals from the second page of their two-part score form into the Dominant Strategy Type Matrix on page 6 of their SLTi self-assessment booklet. They should note and think about the meaning of their highest score. Next, refer participants to the matrix on the lower-half of page 6. Have them check the box(es) to indicate their lowest score(s) and think about what this implies for their development path as a leader (see Slide 21).

Next, they should subtract their lowest score from their highest. The difference should be marked on the bar chart on the left side of page 7 of their SLTi self-assessment booklets, to indicate how variable their use of strategy is. (More variable is better in that it indicates a willingness to flex or to adapt one's leadership in different situations.) Slide 24 supports this activity with a diagram illustrating the concept of learning to switch from one's dominant strategy to alternate strategies.

To fill in the Strategy Effectiveness score-interpretation worksheet on the right side of page 7 of the participants' SLTi self-assessment booklets, skip to Slide 45 in Module 6. Slides 45 and 46 explain the mechanics of calculating the strategic effectiveness score.

Table 1.

Strategic Leadership	Ohio State Studies (1960s)	University of Michigan Studies (1960s)	Robert R. Blake et al.'s Leadership Grid	Fred E. Fiedler's Contingency Theory of Leadership
Instruct	High structure and low consideration	Production-centered leaders	Authority – Compliance	Task-motivated leader
Coach	High structure and high consideration	N/A	Team Management	N/A
Relate	Low structure and high consideration	Employee-centered leaders	Country-club Management	Relationship-motivated leader
Delegate	Low structure and low consideration	N/A	Impoverished Management	N/A

Strategic Leadership	Robert House's Path-Goal Theory of Leadership Effectiveness	Paul Hersey's Center for Leadership Studies Situational Styles (from 1984 publication)	Ken Blanchard's "Color Model" Situational Styles (from a 1985 publication)	Canon Canada, Inc. Active Leadership Program (example of a course applying the basic model; 1997)
Instruct	Directive	Telling	Directing	Teaching
Coach	Participative	Selling	Coaching	Sharing
Relate	Supportive	Participating	Supporting	N/A
Delegate	Achievement-oriented	Delegating	Delegating	Transferring

This completes the scoring and interpretation of the instrument using Part 1 of the SLTi self-assessment booklets. If you already have course content of your own that you wish to use to teach participants about the four strategies (or equivalent styles) and when and how to use them, simply convert the names used in your existing course according to Table 1 and teach your course as you normally would. (However, if you have time to prepare to deliver the course using the additional slides, activities, and other content in the course designs in this facilitator's manual, you may find them more relevant to the contemporary workplace and more consistent with the SLTi self-assessment booklet. Also, the course design(s) provided here take better advantage of the additional learning materials in Parts 2 and 3 of the SLTi self-assessment booklets.)

Before You Begin…

Classroom Requirements

The SLTi Assessment is designed to be administered in a classroom large enough to accommodate 15 to 20 people, with sufficient space to allow participants to break out into pairs or table groups. The classroom should have tables large enough to accommodate four to six participants each.

Equipment and Supplies

You will need the following equipment and supplies to conduct this course:

- ✓ A copy of the *Strategic Leadership Type Indicator* (SLTi) self-assessment booklet for each participant
- ✓ Two flipchart easels with pads and markers
- ✓ Additional chart pads
- ✓ Computer and related equipment for a PowerPoint slide presentation
- ✓ Overhead projector and screen (if you are not planning on using the PowerPoint slide show)
- ✓ Paper and pencils

Note: A disk containing a PowerPoint slide show is included with these training materials. However, if you do not have the necessary equipment to present the slide show, you may print black-and-white or color copies for making overhead transparencies.

Preparing to Conduct the Workshop

Following is a checklist to help you prepare for the workshop.

- ✓ Review the SLTi self-assessment booklet
- ✓ Review the Facilitator's Manual
- ✓ Arrange for equipment and materials needed for the workshop
- ✓ Prepare room and equipment
- ✓ Obtain supplies

Format

You will find that the instructional materials are presented in a two-column format. In the left column is an icon indicating a particular action. In the right column is direction for the facilitator and key points to be presented to the participants.

Directions or instructions for the facilitator will not be bulleted.

- Key points or "scripted" material to be presented to the participants will be indicated by a bullet.

Icons

As you proceed through the guidelines, you will notice a number of icons. Their meaning is defined in the chart below:

	Show a PowerPoint slide		Perform an exercise or activity
	"Lecture" material—key points, instructions, etc.		Refer to the workbook
	Handout		Indicates time
	Break into small groups		Write on flipchart