

SLII® WORKBOOK

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OVERVIEW OF SITUATIONAL WORKBOOK

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2. **What is Leadership**
3. **Three Skills of SLII®**
4. **Diagnosing & Development Levels**
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1. COURSE OVERVIEW

Welcome!

SLII® is a practical method of effectively managing and developing people, time, and resources. This course teaches you, as a manager or leader, to read situational cues and context, and flex to them, to gain influence with both individuals and teams. The course shows how Situational Leadership can:

- Develop leaders who excel at goal setting, coaching, performance evaluating, active listening, and proactive problem solving
- Clarify individual goals and ensure alignment with the organization's goals
- Create systems to track performance and partnering
- Reduce employee turnover and absenteeism
- Increase retention of "star" employees
- Improve individual and organization development
- Improve job satisfaction and morale

Desired Outcomes

When you complete this course, you'll be able to:

- Explain the three skills of the SLII® model—goal setting, diagnosing, and matching
- Describe the four SLII® development levels, and the commitment and competence factors used to diagnose each level
- Detail common diagnosis traps and how to address them
- Describe the four leadership styles that align to the four development levels

2. WHAT IS LEADERSHIP?

Leadership is about partnership. It's not something we do to people, but something we do with them – this is an influential practice with pure intent. Factors that increase effectiveness as a leader include providing clear direction, being authentic with curiosity, expressing an open desire for collaboration, and providing appropriate levels of autonomy for ideation and innovation.

We'll explore these traits today, but before we begin, let's ground ourselves on a few basic assumptions. In working with others, leadership is about knowing how best to show up depending on the circumstance and person(s) involved.

Leadership is not a rank or a role; it is a choice.

Many of us have felt the effects of micromanagers, or the flip side of fending for ourselves to sink or swim, without feeling supported. Our goal is to unpack this dynamic more and hit the sweet spot of knowing the difference and providing the leadership style needed, in the moment.

Micromanaging: Giving people the direction they don't need.

Effective Managing: Giving people the direction they do need, when they need it.

Wisdom: Knowing the difference! (and practice helps!)

3. THREE SKILLS OF SITUATIONAL LEADERSHIP

What is Situational Leadership?

Three Skills of Situational Leadership

1	Goal Setting	Aligning on what needs to be done, when
2	Diagnosing	Collaboratively assessing an individual's competence and commitment on a specific goal or task
3	Matching	Using a variety of leadership styles, comfortably, to provide individuals with what they need

Alignment

Notes:

Goal Setting

Be clear about:





- The goal or task being undertaken
- The intended impact
- How you'll check in and measure progress

4. DIAGNOSING & DEVELOPMENT LEVELS

Identifying and Matching Your Leadership Style to Development Needs

Diagnosing Development Level based on two key factors:

- **Competence (Can I do it?)**
Demonstrated goal- or task-specific, transferable knowledge and skills
- **Commitment (Do I want to do it?)**
Motivation and confidence on a specific goal or task

Stage	Notes/Examples
 <p>D1 Low Competence —●— High Commitment</p>	
 <p>D2 Low to Some Competence —●— Low Commitment</p>	
 <p>D3 Moderate to High Competence —●— Variable Commitment</p>	
 <p>D4 High Competence —●— High Commitment</p>	

DEVELOPMENT LEVEL 1 (D1)

ENTHUSIASTIC BEGINNER

When we decide to approach a new skill/task, we start the learning process with a high degree of enthusiasm and curiosity. In order to carve out time for learning anything new, we need a little kick start, a catalyst. In the earliest phases of learning, that catalyst is our level of commitment. Because it takes energy to break old habits or create practice time, our motivation to learn, achieve, create, and/or demonstrate success leads the way for us taking action.

Low Competence and High Commitment looks like this:

D1: Enthusiastic Beginner



Competence

- New to the goal or task, or new to doing it at Facebook
- Inexperienced
- Don't know what they don't know

Commitment

- Eager to learn; curious; willing to take direction
- Enthusiastic; excited
- Confident about transferable skills; confident learning won't be difficult

A person at Development Level 1 generally needs:

- clear goals and/or definition of role
- clear expectations for getting started (who, what, where, when)
- recognition of enthusiasm and transferable skills
- concrete examples or clarification for what a good job looks like
- frequent check-ins

Notes:

DEVELOPMENT LEVEL 2 (D2)

DISILLUSIONED LEARNER

After getting started on learning something new, there is often that inflection point where the goal/task now feels difficult. We might cut ourselves a little slack and remember we are still learning, but we can get frustrated or confused at how to proceed. Often, this frustration leads to demotivation and unmet expectations. It's natural to move from high to waning enthusiasm, and timing here can be anything from a quick moment to a longer phase. Met with the appropriate leadership style, this phase is typically short.

Low/Some Competence and Low/Some Commitment looks like this:

D2: Disillusioned Learner



Competence

- Has some knowledge and skills; learning; not competent yet
- Doesn't know how to move forward
- Inconsistent performance and progress

Commitment

- Discouraged and frustrated; may be ready to quit
- Overwhelmed; demotivated
- Confused and concerned; afraid of making mistakes

A person at Development Level 2 generally needs:

- clear goals and perspective on why the goal/task matters
- assurance it is OK to make mistakes
- help reviewing successes and improvable
- recognition for progress made
- thoughts on next steps or alternatives

Notes:

DEVELOPMENT LEVEL 3 (D3)

CAPABLE, BUT CAUTIOUS CONTRIBUTOR

Assuming we committed to stick with the goal/task, we start to find our competency builds and because of that, our confidence and motivation increases. We feel like we're developing proficiency in the goal/task, yet our confidence or sense of ease at finishing it can be variable.

Moderate Competence and Variable Commitment looks like this:

D3: Capable, but Cautious, Contributor



Competence

- Demonstrated competence; experienced
- Makes productive contributions
- Generally skillful and adept

Commitment

- Sometimes hesitant, unsure, tentative
- Not always confident; self-critical
- May be bored or apathetic

A person at Development Level 3 generally needs:

- an approachable mentor or coach
- space to test ideas
- an open and supportive environment for expressing concerns and sharing frustrations
- encouragement for self-reliant problem solving
- actions to remove identified obstacles

NOTES:

DEVELOPMENT LEVEL 4 (D4)

SELF-RELIANT ACHIEVER

As our performance during development level 3 continues, we start to feel justifiably confident and able to handle more challenging situations in our area of expertise. We start to approach mastery or subject matter expertise. We are often the go-to person for others and appreciate an open runway for ideation and innovation. Another name for this phase is being in “flow” – we feel a sense of self-efficacy, like we were meant to do the very thing that has our focus.

High Competence and High Commitment looks like this:

D4: Self-Reliant Achiever



Competence

- Accomplished
- Consistently competent
- Recognized by others as an expert

Commitment

- Self-reliant; autonomous
- Justifiably confident; self-assured
- Inspired; inspires others

A person at Development Level 4 generally needs:


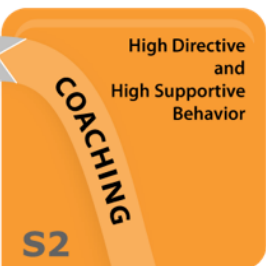


- variety and challenge
 - high degree of autonomy, self-reliance, and trust
 - opportunities to share knowledge and skills with others
- Diagnosing competence and commitment is a matter of triage.

NOTES:

5. MATCHING LEADERSHIP STYLE

Matching Leadership Style

- **Directive Behavior**
Telling and showing people what to do, when to do it, how to do it, and providing frequent feedback on results
- **Supportive Behavior**
Listening, facilitating self-reliant problem solving, encouraging, praising, and involving others in decision making

Stage	Notes/Examples
 <p>High Directive and Low Supportive Behavior</p>	
 <p>High Directive and High Supportive Behavior</p>	
 <p>High Supportive and Low Directive Behavior</p>	
 <p>Low Supportive and Low Directive Behavior</p>	

LEADERSHIP STYLE 1 (S1)



DIRECTING

In order to match the needs of our Enthusiastic Beginner (D1), the primary leadership aim of our S1 style is to help develop competence or greater proficiency with skill/task completion.

A successful S1 leader:

- Acknowledges motivational factors and transferable skills
- Monitors learning, and gives feedback frequently
- Clearly defines goals, timelines, and priorities
- Outlines roles, limits, and boundaries
- Gives examples of what a good job looks like

At the end of goal alignment, typically the Leader Decides on next steps and follow up plan.

NOTES:

LEADERSHIP STYLE 2 (S2)



COACHING

In order to match the needs of our Disillusioned Learner, the primary leadership aim of our S2 style is to re-energize or reteach necessary skills for skill/task completion. It is important to remember the individual is still learning and we want to create space for exploration and open communication.

A successful S2 leader:

- Encourages with feedback for progress being made
- Sets context by explaining why the goal/task matters
- Listens to individual's concerns and ideas, asks questions
- Offers ideas and advice, shares examples

Goal alignment looks more like an active brainstorming session. The Leader may still decide on next steps and follow-up plan, but after dialogue has ensued.

NOTES:

LEADERSHIP STYLE 3 (S3)



SUPPORTING

In order to match the needs of our Capable, but Cautious Contributor, the primary leadership aim of our S3 style is to build confidence in the competence that has grown over time. Now, the individual has shifted from learning to optimizing in accomplishment of their goal/task.

A successful S3 leader:

- Asks, “How can I help?” or other open-ended questions
- Listens to concerns and serves as a supportive sounding board
- Encourages the individual to take the lead in goal setting, actions, and problem solving
- Provides encouragement and reassurance to build confidence and acknowledge proven competence
- Shares expertise and collaborates when asked

Goal alignment, similar to S2, looks like an active brainstorming session. This time, after healthy dialogue, the S3 Leader relies on the individual to decide on next steps and follow-up plan.

NOTES:

LEADERSHIP STYLE 4 (S4)



DELEGATING

In order to match the needs of our Self-Reliant Achiever, the primary leadership aim of our S4 style is to recognize and value the contributions of this individual to the organization. In order for this individual to remain challenged, it is important to connect in ways that support career growth aspirations, role expansion, and/or greater autonomy.

A successful S4 leader:

- Acknowledges, values, and rewards successes
- Asks individual to lead keep others informed
- Provides opportunities for individual to share knowledge and skills through mentoring
- Shares big ideas, big-picture vision, and asks for input
- Trusts the individual's judgment

Discussions around goal alignment are quick informational updates, ideation sessions, or discussions about What Else? is possible. Overall, the individual is making the decisions, not the Leader.

The biggest challenge of the leader is to ensure the highly competent individual is engaged, challenged and feels valued. Otherwise, they can regress to D3 or leave the organization (hence the "caution" sign). If the individual's career growth is aligned with a bigger role or scope of work, partnering to assist in that transition becomes important.

NOTES:

6 PUTTING IT INTO PRACTICE

Putting It into Practice

Apply it to your trainees / team

- In **Part 1**, define a task for each team member you're assessing. If you'd like to assess the same employee on multiple items, use a new line for each skill/task. Remember, development level is goal or task specific!
- In **Part 2**, use the workbook Development Levels pages 7 - 11 to determine the development level, based on behavior.
- Identify at least one next step for each team member.

Skill / Task	Team Member	Dev Level	Next Steps

7 RESOURCES

BOOKS

- **The Leader Within: Leaving Enough About Yourself to Lead Others by Ken Blanchard**

The first step towards becoming an outstanding leader: know yourself. This book will help you understand yourself as a leader... so you can change, grow, and become powerfully more effective. You'll examine the inner self you're currently bringing to your "moments of influence," discovering how your disposition, values, beliefs, and persona are contributing right now to your success -- or failure.

- **Becoming A Resonant Leader by Annie McKee, Fran Johnston, and Richard Boyatzis**

Practical and inspiring, *Becoming a Resonant Leader* is your hands-on guide to developing emotional intelligence, renewing and sustaining yourself and your relationships, and taking your leadership to a whole new level. This book is ideal for anyone seeking personal and professional development and for consultants, coaches, teachers, and faculty to use with their clients or students.

- **Crucial Conversations by Kerry Paterson**

Crucial conversations are interpersonal exchanges at work or at home that we dread having but know we cannot avoid. How do you say what needs to be said while avoiding an argument with a boss, child, or relationship partner? Readers see a proven seven-point strategy for achieving their goals in emotionally, psychologically, or legally charged situations in their professional and personal lives.

- **Leading At A Higher Lever by Ken Blanchard**

Blanchard and his colleagues bring together everything they've learned about world-class leadership. You'll discover how to create targets and visions based on the "triple bottom line", and make sure people know who you are, where you're going, and the values that will guide your journey. From start to finish, this book extends Blanchard's breakthrough work on delivering legendary customer service, creating "raving fans," and building "Partnerships for Performance" that empower everyone who works for and with you.

- **People Styles At Work by Robert Bolton and Dorothy Bolton**

This book reveals the strengths and weaknesses of four different people styles, providing practical techniques that work both on the job and off. This is the ultimate guide anyone can use to enhance even the most difficult relationships.

THANK YOU!

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