



THE MANAGERIAL LEADERSHIP JOURNEY

By Julian Chapman

Milestone #1 Worksheet – Management & Leadership

On a scale of 1 to 10, what level of integration do you see at your organization between management and leadership?

What are the reasons for this, in your view?

What should be done?

What is your own attitude toward the words management and leadership?

Where does that come from?

What will you do about this?



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Milestone #1 Worksheet – Management & Leadership

What is your orientation toward tasks or people?

Why?

How does this manifest itself?

What does your manager value, task or people?

What are the implications?

What must you do?



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Milestone #1 Worksheet – Management & Leadership

What does your organization value, orientation to task or people?

What are the implications?

What might you do?

How well do you balance between task and people or management and leadership?

How do you know?

What are the implications?



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Milestone #2 Worksheet – Managing Managers

What are the top three pain points in your organization?

What are the reasons for this, in your view?

What can you do about it?

How clear are you on the strategy?

What needs clarification?

How will you get greater clarity?



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Milestone #2 Worksheet – Managing Managers

How clear are your managers on the strategy, and how is their work aligned to it?

Why is that?

What needs to be done?

How clear are your managers on their sandbox to work toward delivering the strategy?

Why is that?

How will you go about clarifying if need be?



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Milestone #2 Worksheet – Managing Managers

How aligned are you with your manager's team?

How aligned are you with your own team?

Why is there difference, and what will you do to change it?

How aligned are your managers to your team?

How do you, or will you, know?

If they are not, how will you get them there?



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Milestone #3 Worksheet – Accountability

Is your organization based on accountability, or does it rely on responsibility to be successful?

What are the implications of this?

What do you need to do?

How effective are you at managing the spectrum of consequence? Where do you focus +/-?

Where does that come from?

Where will you focus your energy?



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Milestone #3 Worksheet – Accountability

How effective are your managers at managing the spectrum of consequence? Where are they focused +/-?

Why?

What do you need to do to change this?

How committed are your managers to their work as managers?

How do you know?

Who needs encouragement and how?



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Milestone #3 Worksheet – Accountability

What is the quality of the best advice you are getting?

Are you giving best advice?

If not, why not?

Are your managers getting best advice?

How do you know?

If not, why not?



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Milestone #3 Worksheet – Accountability

Is the emphasis of your managers on the output or the behaviors?

What needs to change?

How will you change it?

Are your managers leading their teams?

How do you know?

What will you do?



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Milestone #3 Worksheet – Accountability

Are your managers coaching and growing their people?

How do you know?

What will you do?

How well are you holding your direct report managers accountable for being good managers?

How do you know?

What do you need to do?



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Milestone #3 Worksheet – Accountability

How well have you developed the talent pool?

Do you have successors for your direct report managers?

What will you do about it?

Have you defined the cross-functional role relationships?

What are the implications of not doing it?

What will you do about it?



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Milestone #4 Worksheet – The Engaged Manager

How many reporting levels are there in your organization?

Is the work clearly delineated between roles?

What do you need to do?

How clear is the workflow across functions?

How well do you support across functions?

What will you do about it?



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Milestone #4 Worksheet – The Engaged Manager

Do your leaders suffer from anaklesis?

What needs to be done?

Are you anaclitic with them?

Consider any direct reports you may have challenges with. Is it a matter of skills and knowledge, not valuing the work, not being able to behave reasonably, or a lack of cognitive capacity?

How do you know?

What will you do?



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Milestone #4 Worksheet – The Engaged Manager

How clear are your people on priority and context?

Why is it clear or not clear?

How can you improve this?

How clear are your people on your expectations?

How do you know?

How well are they cascading it?



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Milestone #4 Worksheet – The Engaged Manager

How robust are your work planning systems?

How effective are your managers at planning?

What do you need to do?

How well do you integrate new team members?

How well do your managers integrate new members?

What are your selection success rates?



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Milestone #4 Worksheet – The Engaged Manager

How quickly do you deal with issues where employees are not able to do the work?

How successful are you at reintegrating them elsewhere?

What needs to be done about this?

Do you have a culture of continuous improvement?

What is your attitude toward mistakes?

How do you learn from mistakes or successes?



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Milestone #4 Worksheet – The Engaged Manager

How effective are you at monitoring the effectiveness of your managers?

How well do your managers monitor their people?

What will you do about it?

How much of your work is coaching your managers to be good managers?

How effective are your managers at coaching?

What will you do about it?



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Milestone #4 Worksheet – The Engaged Manager

How much of your meetings and one-on-one discussions are about management and leadership issues?

Why is that?

What do you need to do about it?

How good are you at assessing effectiveness?

How good are your managers at assessing effectiveness?

What will you do about it?



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Milestone #4 Worksheet – The Engaged Manager

How clear are your task assignments?

How clear are your manager's task assignments?

What will you do about it?

How well do you adapt tasks as circumstances change?

How well do your managers adapt as circumstances change?

How well do they keep you informed of changing situations?



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Milestone #5 Worksheet – Enlightened Leadership

Reflect on great leaders in your life. How enlightened were they?

How so, and how not so?

What do you notice?

How authentic a leader are you?

What needs more work?

What will you do about it?



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Milestone #5 Worksheet – Enlightened Leadership

Consider your leaders. How authentic are they?

Which need to focus on this?

What will you do about it?

How much of a servant leader are you?

Why?

What will you do?



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Milestone #5 Worksheet – Enlightened Leadership

Consider your leaders. Who are more servant oriented, and who are not?

Which need to focus on this skill and why?

What will you do about it?

How much of a transformational leader are you?

Why?

What will you do about it?



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Milestone #5 Worksheet – Enlightened Leadership

Consider your leaders. Who are more transformational, and who are not?

Which need to focus more on this skill and why?

What will you do about it?

What is the state of hubris and humility in your team?

How do you know?

What will you do about it?



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Milestone #6 Worksheet – The Operational Art

How clear is your strategy?

How well is it articulated and referred to?

What do you need to do differently?

Are your ways and means to achieve the strategy clear?

How do you know?

What will you do about it?



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Milestone #6 Worksheet – The Operational Art

How good are your tactics?

Are your processes clear?

Is it clear how the work flows?

How effective is your operational level?

Do they have the time to plan?

Do the tactical levels have time to plan?



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Milestone #6 Worksheet – The Operational Art

How clear is the context for others?

How good is your situational awareness?

What will you do about it?

How well do you set priorities?

How well do your subordinate managers set priorities?

What will you do about it?



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Milestone #6 Worksheet – The Operational Art

How good are you at innovation?

Are you hearing ideas coming from below?

What will you do about it?

Do your people live by the values?

Do your managers drive home the values?

What will you do about it?



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Milestone #6 Worksheet – The Operational Art

How effective is your knowledge management?

Do your people share information well?

What are the opportunities to improve knowledge sharing?



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Milestone #7 Worksheet – Skills for You and Your Team

What is the quality of the thinking in your organization?

How do you know?

What do you need to do differently?

How flexible is your thinking?

How do you know?

What will you do about it?



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Milestone #7 Worksheet – Skills for You and Your Team

How well do you challenge the thinking of your team?

How well do your managers challenge the thinking of their teams?

What will you do about it?

How is your physical wellness?

How do you know?

What will you do about it?



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Milestone #7 Worksheet – Skills for You and Your Team

How is your mental wellness?

How do you know?

What will you do about it?

How is your managers' physical wellness?

How do you know?

What can you do about it?



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Milestone #7 Worksheet – Skills for You and Your Team

How is your managers' mental wellness?

How do you know?

What can you do about it?

Is there potential sanctuary trauma in your organization?

What are the potential causes?

What will you do about it?



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Milestone #7 Worksheet – Skills for You and Your Team

How well do you follow up?

How do you know?

What will you do about it?

How well do your leaders follow up?

How do you know?

What will you do about it?



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Milestone #8 Worksheet – The Tools of Management

How laterally integrated are your teams?

How do you know?

What do you need to do differently?

How can you use trilevel team meetings?

How can you direct reports?

What is your rhythm for their use?



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Milestone #8 Worksheet – The Tools of Management

How good are you at assessing why things go wrong?

How good are you at assessing why things go right?

What are examples of where you could have used an AAR to find out what happened?

Is your organization a learning organization?

How do you know?

How can you use the AAR to learn better?



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Milestone #8 Worksheet – The Tools of Management

What needs to change in emails?

What needs to change in meetings?

What will you do differently?

How good is your organizational cadence?

How do you know?

What will you do about it?



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Milestone #8 Worksheet – The Tools of Management

How could you improve your battle rhythm?

Could your managers improve their battle rhythm?

What will you do about it?

Do your people live by the values?

Do your managers drive home the values?

What will you do about it?



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Milestone #8 Worksheet – The Tools of Management

How effective is your knowledge management?

Do your people share information well?

What are the opportunities to improve knowledge sharing?