PiA DISCOVERY iN ACTION®

Influencing / Stakeholder Process Overview

S1 : Large group exploration

B/w S1&2: Refine beliefs

Bring beliefs to small group S2

Post S1: Electronic copy of workbook

1 DISCOVER AND EVOLVE MY UNIQUE PEOPLE LEADERSHIP MODEL

BELIEFS BEHAVIOURS

B/w S2&3 Create context *relevant model beliefs + behaviours* and self assess

Handout 2 : Influencing stream : beliefs and behaviours

Explored further in S7 with large group

Handout 6 : Mini-survey + Final Reflections

B/w S6-7 Mini-survey Actions Reflections Evaluation

6 REFLECT ON EXPERIENCES AND CHECK PROGRESS

2 SELF ASSESS MY CURRENT EXECUTION OF THIS MODEL

S3: Share new model and discuss self reflection about how well they do these now

COACH SUPPORT PEER DISCUSSION REFLECTION JOURNALING

SENSEMAKING

Explored in S5 & S6

Handout 5 : Reflection of a leadership interaction

B/w S5-6 Implement actions Reflections

5 IMPLEMENT MY ACTION PLAN

3 TEST MY LEADERSHIP MODEL AND PRACTICE WITH OTHERS

B/w S3&4 Testing of model

Handout 3 : Influencing steam Testing your thinking

Explored in S5 & S6

Handout 4 : Influencing stream example action plan

B/w S4-5 Identify & implement actions

4 MAKE SENSE OF THE FEEDBACK AND DEVELOP MY ACTION PLAN

S4 / S5: Discuss results of testing

Applied Activity between S2 and S3: Creating an Influencing / Stakeholder Model : Beliefs and Ideal Behaviours

For some of you, working with and influencing people over whom you have no direct authority, may be a key part of your role. You may not lead people directly, but demonstrate your leadership in other ways. The core program your peers are completing has 'leading people' as its core context. As this is not your primary context, you may find it more useful to apply the same 'beliefs and behaviours' framework of thinking to your current context.

What you have completed so far

You have created some beliefs that are consistent with the lead in question : When do people perform at their best? It is now time for you to consider a different lead in statement that aligns with your current role.

What to do next

Step 1 : Save a new copy of your 'Leading People' model and call it something more relevant to your context - eg 'Influencing" or "Leading Peers and Stakeholders'.

Step 2 : Consider a new lead in statement (these are examples; you may need to tweak this to make it more closely relevant to your context)

Peers and stakeholders willingly and effectively undertake actions or be receptive to a change when...

Peers/stakeholders/clients will have high trust in their relationships with people they do business with when...

People over whom I have no direct authority, will most likely be receptive to a change or a different way of doing things when...

Put yourself in the 'shoes' of a stakeholder - and see things from their perspective. How would you answer that question? Jot down some thoughts... and capture them in a similar way to before:

Belief statement: I believe that peers and stakeholders will willingly and effectively undertake actions or be receptive to a change when... *(modify to suit your context)*

✓ They connect to and buy-in to what is trying to be achieved and understand the impact and consequences of the change.

✓ They believe in the worthiness of the benefits (and they outweigh the losses)

✓ They can see how the activity / change contributes to the bigger picture

✓ They feel supported by their authorising environment

✓ They ...... etc

Step 3 : Review your belief statements in your 'leading people' model. How many of them are similar? Some will be relevant for both contexts - leading people and influencing - but on their own they probably won't be enough. What other conditions need to be in place to complete your lead in statement?

Step 4 : Think about the behaviours that would support these new belief statements. These are the ideal behaviours and actions that would be required to bring about the condition described in your belief statement. It may not necessarily be what you do now. Ideally express these actions and behaviours in the first person.

(Some examples are provided on the following page)

Step 5 : Once you have identified the ideal behaviours, complete a self assessment:

- Are there some that you think you are pretty good at?
- Are there those you don't do as well or at all?
- Consider colour coding or another way to capture your self assessment (eg core strengths in green, do 'sometimes' in amber, opportunities for improvement in red?)
- Bring **copies** along with you to share with colleagues in the next meeting

Example

Belief statement: I believe that people, with whom I have no direct authority, are most likely to be receptive to a change or a different way of doing things when... *they connect to and buy-in to what is trying to be achieved and understand the impact and consequences of the change.*

Behaviours that would support that Belief statement:

- I ensure that I clearly outline the ultimate goal and highlight the positive difference it will make, compared to the current position

- I present a compelling argument that others can emotionally connect to by highlighting the tangible benefits of my position (via one on one, information sessions)

- I identify areas where it is appropriate to involve others in decision making and genuinely seek to facilitate a collaborative outcome

- I ask questions and seek to understand things from another peoples' perspectives and then communicate information that is relevant to those perspectives or concerns

- I use different approaches to disseminate information (presentation, face to face, phone, email, newsletter etc)

- I focus on building the skills and capability of others by providing necessary, training, resourcing, policies and procedures etc appropriate to the situation

- I..........etc

Stakeholders/Influencing
Testing your thinking
Leaders with no staff

Applied Activity between S3 and S4: Testing your thinking

What you are doing in the next phase – 3 elements to test

To this stage your stated beliefs and behaviours represent a set of assumptions about when you believe needs to be in place for your new 'lead in statement, what leadership behaviours are important in positively contributing to those conditions and your perceptions of your relative strengths and weaknesses in practicing those behaviours. It is now time to **test** these assumptions by engaging with people and seeking feedback!

Testing of your model can be done a number of ways; through consultation with others and/or through action. In the first instance, we suggest you find some appropriate people to discuss your model with. You'll also be able to also test your model through action over the coming weeks.

Testing through Consultation

As action researchers you should seek to generate data through engagement with the most appropriate people that will help you gain insight into your own leadership practice. You may wish to consult with peers and stakeholders you work with to find out how they experience you in dealings with them. You may wish to consult with other leaders who have a similar context to you, and compare your thinking. You may wish to talk to a leader you admire so you can learn from them. We suggest you talk to at least 2 people - but you are welcome to speak to more.

In going down this path, you will be testing 3 elements of your model:

o   The **assumptions** about when peers and stakeholders willingly and effectively undertake actions or are receptive to a change (the beliefs) - *or your lead in statement*

o   The **ideal behaviours** that will help make this happen/that are consistent with these assumptions

o   The **accuracy** of the self assessment of your actual behaviours

Things to think about when planning your approach include:

- Who will you speak with? What is your relationship like with this peer / stakeholder? How do you judge the strength of this relationship?

- What is your objective for this relationship, and how can this be enhanced by having a conversation with them?

- What belief statement is being tested by sharing your thinking with them? What behaviour is being embedded by engaging in this conversation?

- How will you invite them to have a conversation? How will you frame it up and define what you want from them?

- How will you manage the conversation itself? Will you share your model with them? Will you ask for verbal or written feedback?

- Will you provide them with an indication of what you perceive to be your strengths and weaknesses for comment or will you seek their views on what they perceive to be your relative strengths and weaknesses?

- What concerns, risks or anxieties do you have about the conversation? How will you mitigate those risks or handle them if they arise?

- Is there anyone else you could share this thinking with? Is there anyone who you think does this well?

Stakeholders/Influencing
Testing your thinking
Leaders with no staff

Depending on your answers to these questions, you may choose to **liaise directly** with **different stakeholders**, or you **may decide it is more appropriate,** rather than obtaining direct feedback, to implement behaviours and actions and generate data through your observations of the impact of those behaviours and actions. This will provide a basis for reflection on the validity or otherwise of your theory (beliefs and behaviours statements).

Once you have decided on your approach to engage with your stakeholders, explore with them:

- **Beliefs** - Do your assumptions about working with peers and other stakeholders ring true for them? Are there subtle changes required? Is anything fundamentally missing?

- **Ideal Behaviours -** Are the 'ideal' behaviours identified the right ones? Are some more important than others? Are any critical behaviours missing?

- **Actual Behaviours** - Which behaviours do they see as strengths or weaknesses (if appropriate)? How accurate is your self-assessment? Is there anything they need more of from you in this relationship? Which behaviours do they see as important in the next few months for you to focus on (feedforward)?

- **Future actions** – What ideas or suggestions do they have about how you might, in practical terms, further implement some of the behaviours that they view as important?

Before embarking on this testing process, refer to the Discovery in Action 'Tips and Hints' on "Influencing", "Managing Up", "Achieving Buy-In", and "Leading Peers". You may wish to consider some of the strategies suggested here when planning this testing conversation.

Applied Activity between S4 and S5: Action Planning

Another valid way to test your model and how well you demonstrate the behaviours within it is to *implement* your ideal behaviours and actions, and generate data through your observations of the *impact* of those behaviours and actions.

Which behaviours or actions do you wish to experiment with over the coming months?

Select 3-4 behaviours you consider to be of high importance; find the ones that will have the greatest impact.

o What is your **goal** for the next few months? *What* behaviours do you intend to focus on?

o What **specific actions** will you take? *How* are you going to put this behaviour into practice?

o What **results/benefits** do you expect the actions to have? Ensure that it has some relationship with the belief statement the behaviour purports to

o How will you **evaluate the impact** of your actions/whether the result is being achieved? Options include: observation, obtaining direct feedback, 360-degree instrument, group discussions, staff surveys etc. This checking may be at two levels – progress and achievement.

Example Only:

Goal (what)	Planned action (how)	Intended result	How will I evaluate?
To build higher levels of trust with stakeholder X	I will work to keep my promises, respond to requests quickly and where appropriate, find opportunities to demonstrate my expertise and the value of my ideas	An increase in my credibility and a strengthening of my relationship with stakeholder X	Improvements in the relationship, greater ease in meeting deadlines, extension of the things I do for them. I will ask them!
To more actively engage people in the decision making process	I will make more 1:1 appointments with stakeholders to seek their opinions and share my thinking	More satisfaction and buy-in to decisions	direct feedback, evidence of a more positive 'vibe'
To practice more active listening	▪ Listen more and talk less one to one and group situations ▪ Regularly summarise what I have heard	My colleagues will notice and change and comment on it! They will feel more supported and have greater input into decisions	360 degree feedback Direct feedback
To provide and be more open to constructive feedback	I'll build a progress check with key individuals involved in the project so I can seek feedback about my own performance and if appropriate, provide clear and direct feedback to colleagues	I will become better at having these conversations, individuals will respond favourably and performance levels should improve, the 'elephants' in the room won't be there anymore	Evidence of actually having these conversations, observations of changes in performance in myself and the people I have these conversations with

We encourage you to keep a reflective journal on your experiences and observations.

Don't forget to refer to the Discovery in Action 'Tips and Hints' on "Influencing", "Managing Up", "Achieving Buy-In", and "Leading Peers" for more action ideas.

Applied Activity between S5 and S6:
Reflection of a Leadership Interaction

Identify a recent situation when you took a leadership action or were involved in a situation which has resonated with you.

Description of the Leadership Interaction / Situation (Action)

Questions to consider:

- What was the situation / interaction?
- Why did you choose this situation / interaction to reflect upon?
- What do you remember happened?
- What was your role in the situation? What actions did you take?

Data generated from the incident (Data)

Questions to consider:

- What reaction/s did you become aware of at the time / during the interaction / situation?
- What impact did your actions have on the situation / on others?
- How did you feel at the time?
- What have you noticed since the situation / interaction?
- What (if any) feedback did you receive about the interaction?

Learning from the experience (Sense-making)

Questions to consider:

- What did your actions tell you about your thinking / beliefs?
- How might others involved in the incident have interpreted your actions?
- How might an outsider have viewed the incident?
- What alternative actions might you have taken?
- What insights have you gained into your thinking, beliefs or assumptions?
- What might this mean for your future action?

You may wish to write answers in your journal or include in your DiA workbook.

Applied Activity between S6 and S7: Administer a mini-survey

Prior to session 7 approximately 3 months will have passed since you formed your action plan. It is now time to get some feedback on the progress you are making!

- A proforma *Word* template will be provided to you electronically immediately after session 6.

- Insert your name into the template.

- Insert the key behaviours you are testing. These should be represent those in your action plan (from the 'goals' column).

- Identify those people who you will ask to complete the survey – it doesn't necessarily have to be only the people with whom you tested your model with.

- It's up to you as to how you administer the survey.

- Administer the survey close to session 7 to allow maximum period of time for implementation of actions.

- Tally the results and make sense of the feedback received. Engage with responders as you see as appropriate (eg 15min conversation).

- Thank people for completing the survey.

Example Only: (A blank word template will be provided electronically to you immediately after session 6)

Do you believe Elaine Smith has become more (or less) effective in the past three months in regards to the following items? Please circle the number that best matches your estimate of any change in effectiveness: *where on a 7-point scale: +3 = significantly more effective, 0 is no real change and -3 is significantly less effective.*

	Less effective			No real change	More effective			Not enough evidence
1. Is positive and encouraging of staff	-3	-2	-1	0	+1	+2	+3	NE
2. Effectively provides direction	-3	-2	-1	0	+1	+2	+3	NE
3. Practices active listening	-3	-2	-1	0	+1	+2	+3	NE
4. Provides constructive feedback	-3	-2	-1	0	+1	+2	+3	NE
5. What else can this individual do to become a more effective leader?								

A study undertaken into 11,000 post-leadership program participants across 8 organisations found that 'time and again, one variable emerged as central to the achievement of positive long-term change: the participants' ongoing interaction and follow up with colleagues. Leaders who discussed their own improvement priorities with their coworkers, and then regularly followed up with these co-workers, showed striking improvement. Leaders who did not have ongoing dialogue with colleagues showed improvement that barely exceeded random chance'.

Leadership is Contact Sport, Marshall Goldsmith & Howard Morgan, strategy + business issue 36, Autumn 2004

Do you believe <u>INSERT NAME</u> has become more (or less) effective in the past three months in regards to the following items? Please circle the number that best matches your estimate of any change in effectiveness, where on a 7-point scale: +3 = significantly more effective, 0 is no real change and -3 is significantly less effective.

	Less effective			No real change	More effective			Not enough evidence
1.	-3	-2	-1	0	+1	+2	+3	NE
2.	-3	-2	-1	0	+1	+2	+3	NE
3.	-3	-2	-1	0	+1	+2	+3	NE
4.	-3	-2	-1	0	+1	+2	+3	NE
5. What else can this individual do to become a more effective leader?								

Please return by <u>INSERT DATE</u>

Applied Activity between S6 and S7: Final Reflections

This is a 2-page set of questions to assist with your final reflections. We suggest you think about these closer to our final meeting – the questions will form the basis of the conversation we'll have as a larger group at that meeting. These are only thought prompters for your own reflections – there is not a requirement for this to be formally completed and handed in!

1. What new insights did you gain as a result of working through the *Discovery in Action®* process?

2. What are you now doing differently as a result of your research into your own leadership practice?

3. What did you discover about yourself?

4. What did you learn about *the practice of reflection*?

5. What impacts (if any) have there been on the climate and performance of your team or individuals resulting from changes you have made as a leader?

6. How do you think you will use your leadership model to continue to develop your leadership practice?