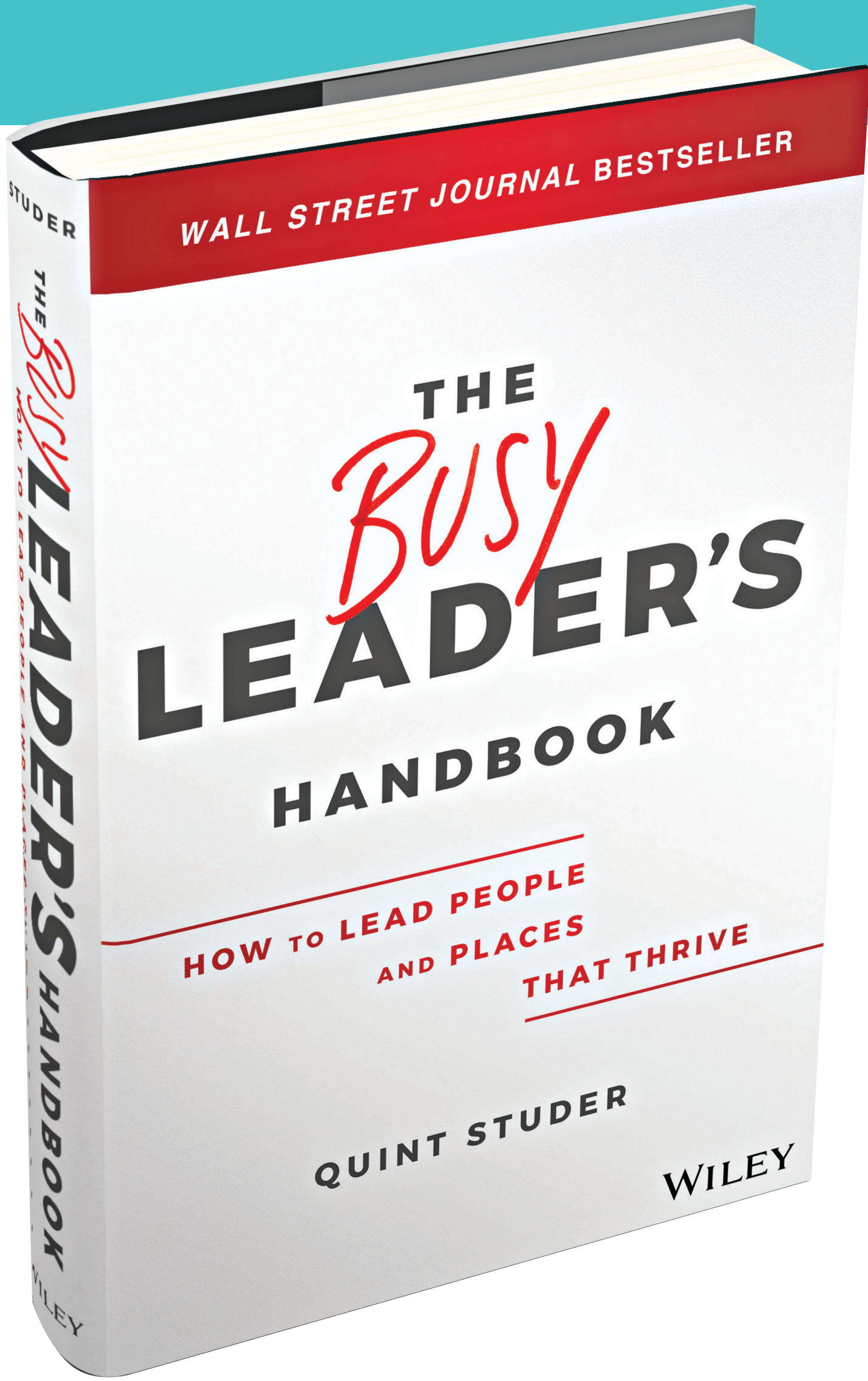

Mini-Toolkit

Welcome to *The Busy Leader's Handbook* Mini-Toolkit.

This is a companion piece that's meant to be used alongside *The Busy Leader's Handbook: How to Lead People and Places That Thrive.*

While the book itself is short, succinct, and practical, this mini-toolkit is even more so. It's designed to make it even easier for you to put the book's tactics into practice.

Inside you'll find tools like planning guides, worksheets, and other exercises that walk you through some of the book's most impactful behaviors and practices. Use this mini-toolkit in the way that works best for you:

- As a resource to hardwire a few powerful best practices in your own leadership
- As a training tool for managers (it's especially helpful when you're training in groups)
- As an orientation piece for new leaders
- As a refresher course for anyone struggling in a specific area of leadership
- As a gift for someone you're mentoring

You can do these exercises as you read *The Busy Leader's Handbook* (numbers at the top of the page identify the corresponding chapter) or "just in time" as you need them.

From time to time, we'll update this toolkit, so please check back regularly on our website, www.thebusyleadershandbook.com. We would love your feedback and suggestions at any time!

Thank you,

Quint

Contents

8 Get Intentional About Time Management

TOOL: Deep Work Planning Sheet

Deep work is work that requires us to focus. It is cognitively demanding (as opposed to shallow, routine, or logistical work that can be done while we're distracted). While it's typical for people to prefer simpler tasks that we can check off our list, those projects that require deep work are the ones that produce real value and "career capital." That's why we need to build time for deep work into our schedule.

This planning sheet can help. Use it at the start of each month to schedule at least two deep work sessions. When you do this, and when you write down some goals ahead of time, the sessions become more "real." You are more likely to hold yourself accountable for sticking to them.

STEP 1: Get your deep work sessions on the calendar. Select at least two 2- to 4-hour blocks of time. (You might start out with two hours and later build up to four.) Guard and protect these windows of time. They are just as important as a meeting with your boss or a key client.

Questions to Help You Plan:

What days will I have no (or fewer) potential conflicts, professional or personal?
What time of day am I most productive?

STEP 2: Decide what goals you want to achieve during your deep work sessions. Write down your answers.

Questions to Help You Plan:

What projects are most important to my goals?
What deliverables will I complete during the session? (For instance: "I will outline two chapters of my book" or "I will complete Phases One and Two of next year's budget.")

STEP 3: Decide where you will do the deep work. Location is important.

Questions to Help You Plan:

Can I work from home that day?
If I work at the office, what can I do to ensure there are no distractions? (i.e., ask coworkers not to disturb you, close down your email, shut your door, wear noise-canceling headphones)

STEP 4: Clear the time and space around your deep work sessions. It's best to open up a window of "free" time both before and after the sessions to make sure other tasks don't encroach on this valuable time.

Questions to Help You Plan:

What can I get done ahead of time to avoid emergencies that could interfere with my sessions?
Can I make alternate arrangements for child pick-up or other obligations that day in case I am "on a roll" and don't want to stop?

STEP 5: As time for the sessions gets closer, set yourself up for success. Let people know that you'll be unavailable for a while. Make it "official" by putting the session on your schedule. Be sure to show what you are working on so others can schedule their own deep work time accordingly. Be hard and fast on the rules—if you treat these sessions as flexible, others will too.

Questions to Help You Plan:

How will I handle calls and emails that may come in during the session? (Ask an employee or colleague to cover you, as some people may expect immediate responses. You might also consider setting up an "out-of-office" email reply or outgoing voicemail message such as, Happy Wednesday! I have blocked some time today between noon and 3:00 p.m. to do some focused work. I will not check email or voicemail until 3:00 p.m. Central Time. If you've reached me during this time and you need to speak with me before 3:00 p.m., please call me at 123-456-7890. Otherwise, I will respond to your request when I check messages at 3:00 p.m. Thank you for understanding and have a great afternoon!)

When will I break to check for urgent emails and other emergencies?
Hunger pains can derail deep work, so how can I plan to stay energized? (e.g., eat a good breakfast with plenty of protein and perhaps pack a bag of healthful snacks and drinks)

A Few Tips to Help With Deep Work:

1. It's not going to be easy or "fun." Once you accept that deep work sessions are intense and challenging, they paradoxically get easier. Also, what's difficult is usually rewarding.
2. Start small if you need to. Four-hour sessions are great (and some people can go even longer), but it's okay to start with two hours or even one hour and build up to more.
3. Be aware of what distracts you (social media? phone calls from your family?) and take steps to avoid those distractions.
4. To stay focused, bring a notepad to write down bright ideas that pop up. Sometimes when you're "in the zone" you have your best ideas. This way they won't get lost.
5. Don't try to "save up" other tasks to tackle at the end of your deep work session. You will be mentally spent afterward. If you work best in the mornings, have your time end at lunch so you can recharge if you have to go back to the grind. If afternoons are your peak time, have your work block run up to the end of the day, so you aren't tempted to squeeze in one more thing before you go home.

Special thanks to Hillary Person with Studer Properties and Shannon Nickinson with Studer Community Institute for assisting in the creation of this tool.

10 Change the Way You Think About Change

TOOL: Mind Shifts and Exercises That Get People Comfortable with Change

We live in a time of constant change. It isn't some remarkable, disruptive event. It's just a feature of our world. Yet, people inherently resist change. Sometimes it's employees, yes, but often it's leaders who struggle the most! Unfortunately, when we resist change, we may not be able to keep up with shifting employee and customer needs. It's important to make sure everyone in the company is comfortable with change—or at least comfortable with being uncomfortable.

A Few "Mind Shifts" Around Change

You can use these mantras and inspirational quotes in various ways inside your company. Share them in meetings. Feature them in newsletters. Post them on your company's social media accounts. Display them on the walls in offices, hallways, and the breakroom. Ask people to discuss them or give feedback on them.

You never know when seeing or hearing something expressed in a new and different way will resonate with someone—even if they've heard it all their life, they may finally "get" it.

- "If there are two things people hate, it's change, and the way things are." (This quote brings a bit of humor to the subject by spotlighting a truth about human nature.)

- Change isn't a big deal. It's ongoing and ordinary. It's just part of the way we live now.

- Living with change is a lot like embracing a healthier lifestyle. It's not a diet; it's a permanent change. We can't "go on" a diet because that implies that at some point we'll "go off" the diet. There is no "going off" change. We simply commit to nonstop forward motion, every day.

- I never stop looking for ways to make things better.

• "All things are difficult before they are easy." —Thomas Fuller

• "Good things take time." —John Wooden

• "The pessimist complains about the wind; the optimist expects it to change; the realist adjusts the sails." —William Arthur Ward

• "Change is the law of life. And those who look only to the past or present are certain to miss the future." —John F. Kennedy

• "The secret of change is to focus all of your energy not on fighting the old but on building the new." —Socrates

• "Be water, my friend." —Bruce Lee

Two Exercises to Smooth the Path for Change

The Positive Language Challenge. Issue a week-long challenge to yourself and to teammates to stop thinking (and talking) about change as some big, overwhelming event. Ban complaining, fretting, and negative talk. Instead, urge everyone to start thinking (and talking) in terms of "continuous improvement," "evolution," or simply "a better way to do it."

Make it a fun game. For example, you might put out a literal "change" jar (a version of a "swear" jar) and have people put a quarter in when they complain about change or even use the word.

Language is powerful. When we change how we talk about change, we change how we think about it, too.

The "Here's a Better Way" Contest. Get people in the habit of continuous change by urging them to come up with better processes, better service practices, and other improvements. Distribute this "Here's a Better Way" form and have people fill it out. Give them a deadline to submit their ideas. Then, choose a winner. Implement their idea and give them a small reward. Hold this contest periodically. It's a great way to get people in the right mindset about change.

Here's a Better Way

My Idea:

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What It Will Improve:

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Who It Will Benefit:

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How I Can Help Implement It:

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______________________________ (Name)

______________________________ (Date)

Here's a Better Way

My Idea:

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What It Will Improve:

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Who It Will Benefit:

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How I Can Help Implement It:

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______________________________ (Name)

______________________________ (Date)

14

Reaching Resolution: How to Have Tough Conversations Without Damaging Relationships

TOOL: Tough Conversations Progress Report

From time to time, all leaders must have tough conversations with employees, partners, vendors, and even clients. The goal is always two-fold. One, you want to solve the problem. Two, you want to do it without damaging the relationship with the other person.

Ideally, at the end of a tough conversation, each person has a task to do going forward. Later, you can schedule a follow-up conversation to see if things have improved.

This "progress report" can help keep both parties on track and accountable for the changes they need to make. It also facilitates conversation and alleviates anxiety since it clarifies expectations. It's a good relationship-builder because it shows that both people are making an effort to be better.

Part One is meant to be completed during the initial tough conversation.
Part Two is meant to be completed either during the follow-up conversation or immediately before it.

Conversation Progress Report Part One

(To be completed during initial conversation)

Challenge Identified During Conversation:

Proposed Solutions:
(Here, each party will list what they intend to do to solve the challenge.)

Party One Proposed Action Steps:

Party Two Proposed Action Steps:

Conversation Progress Report Part Two

(To be completed during follow-up conversation)

Progress Made Toward Solving Challenge:
(Here, each party will list the steps they took to address the challenge. Then, each party will write down their thoughts and reflections on how it went, what they learned, and how they might improve in the future.)

Party One Action Steps Completed:

Reflections:

What I will do moving forward:

Party Two Action Steps Completed:

Reflections:

What I will do moving forward:

Special thanks to Donna Kirby with the Pensacola Blue Wahoos for assisting in the creation of this tool.

17 The Secret to Strong Relationships: Manage the Emotional Bank Account

TOOL: Leader Rounding Agenda

To build strong relationships with employees, leaders need to really get to know them. We must get intentional about making a real connection with people. Leader rounding allows us to do that. When we put a system in place to make a one-on-one connection with each direct report—and actually schedule it so it will get done—we get to know them as individuals. We also make sure they have what they need to do their best work.

Here are some questions to ask when you round on your employees:

- A personal connection question (For instance: How's your family? Where are you going on vacation this year? Has your son decided on a college yet?)
- What's working well right now?
- Has anyone been helpful to you whom I can recognize on your behalf?
- What's your biggest accomplishment this month?
- What's your biggest challenge right now? Are there any roadblocks preventing you from doing your best work?
- What do you need from me to succeed?
- How do you work most effectively?
- What was the biggest thing you learned this week/month?
- How are you using your talents and skills to move our team forward?
- What would make you listen to a call from a recruiter from another organization?
- How can I be a better leader?
- Do you have the tools and equipment you need?

Of course, feel free to add your own questions to this list.

Tips:

• **Ask sincerely.** Ask these questions with authenticity. You really want to know the answers. You're not reading a form—you're engaging with a person.

• **Ask humbly.** You ask questions to get answers. In other words, you ask to learn. Be prepared to hear answers you may not like. This isn't a time to protest answers with a no-can-do attitude. It's a time to listen—openly and honestly. Be patient and hear your team member out.

• **Ask frequently.** Ask the questions monthly or weekly. Totally transparent answers may not be forthcoming the first time you try. But as your team members are reminded of these questions, the gears begin to turn, and the thoughts begin to flow. Make these questions a regular part of your conversations.

• **Take action!** When someone gives you feedback on something that needs to change, you absolutely need to act on it and follow up with them later.

Rounding Log

Date: ______________________

Employee: ____

Action to take place: ______________________________________

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Special thanks to Rachael Gillette with Studer Community Institute for assisting in the creation of this tool.

TOOL: The Leader's Pledge

Building a positive emotional bank account with employees means doing all you can to keep your relationships strong, healthy, and productive. Writing down what you want that relationship to look like can help. There's something about putting pen to paper that creates a different level of accountability and lets people know what to expect from you. Also, you can refer back to it once in a while to remind yourself what kind of relationships you're striving to create.

Create your own personal Leader's Pledge. *Here is a sample:*

I pledge to…

- Treat you with respect and dignity
- Work to develop a good understanding of your work situation and your career aspirations
- Help you learn, grow, and realize your career ambitions
- Provide you with clear expectations
- Encourage you to take more responsibility
- Recognize good work and reward goals met
- Avoid micromanagement and trust you to do the job you were hired by me to do
- Responsibly ensure that you have the resources necessary to do your job
- Ensure you have the opportunity to take time off for you and your family
- Be as flexible as reasonably possible around work hours and location
- Work hard alongside you and our team to fulfill our mission and achieve goals
- Ask for and respect your ideas

Now, take 30 minutes to think about and write your own pledge.
Be as creative as possible. Make it real and personal. Then, share it with your team.

OPTIONAL: You might ask team members to write a Follower's Pledge and share with you as well.

Special thanks to Rachael Gillette with Studer Community Institute for assisting in the creation of this tool.

18 Positive Recognition Changes Everything: The Art of Rewarding, Recognizing, and Saying Thank You

TOOL: Thank-You Note Template

Positive recognition is a powerful tool for creating a positive workplace and shaping your culture. Singling out and thanking an employee for a specific behavior goes a long way. The employee feels good about the action being recognized. Because recognized behavior gets repeated, the employee will continue to do it. Other employees see what actions are being positively recognized and often follow suit. Do this over and over, with all employees, and your culture will shift. What gets rewarded and recognized gets repeated.

Writing thank-you notes to employees is a highly effective method for rewarding and recognizing them. But don't just randomly send out notes; create a system to ensure that it regularly gets done.

A Few Tips:

• In big companies, selected managers can identify an employee who deserves a thank-you note and email their name to the CEO each week. The email should outline why the person should get a thank-you note. Then, the CEO writes the thank-you note, giving the supervisor credit and outlining what they said in the email about the employee. (This makes the employee feel good about both their supervisor and the CEO.)

• In small companies, the owner can identify the employee and write the note themselves. It requires only paying attention to what people are doing right.

• Be as specific as possible. A general thank-you note is better than no note; however, the magic is in the specifics—what the employee did and how it benefitted a customer, a coworker, the company's brand, etc.

• Handwrite the note. Send it to the employee's home. This leaves an indelible mark. It becomes a family conversation.

A Rough Template You Can Use:

Dear ________________,

I wanted to thank you for _____________
(Here, sum up what you are thanking them for: their work ethic, their extraordinary customer service, their positive attitude, etc.)

Your supervisor (or coworker, customer, etc.), _____________*(NAME),*
told me that you __________________ *(Here, give specifics on what the employee did. The more detail, the better. Include background information as appropriate.)*

Here's why that matters: __________________________ *(Here, explain the positive effect the person's actions had on a customer, coworker, or someone else. This is where you connect the employee back to the sense of meaning and purpose that keeps them giving their best effort.)*

Again, thank you for being such a wonderful employee.
I truly appreciate you!

Special thanks to Candice Miller with Studer Family of Companies for assisting in the creation of this tool.

22 Know What the *What* Is for Others (and Communicate Your Own *What*)

TOOL: Employee Preference Card

We all have our own *what*—meaning the one thing that really motivates us. (Or, in some cases, it may be two or three things.) When you know what the *what* is for your employees, you have a much better chance of understanding their behavior and maximizing their performance. When you don't take the time to figure out what drives employees and helps them do their best work, you may make assumptions that aren't accurate.

Employee preference cards are a great tool for helping you really get to know each person on your team. They can also help your team get to know each other. Here's how to create them:

STEP 1: Ask your employees some key questions about themselves. For example:

What makes you feel valued?
What energizes you?
What are some areas you'd like to be developed in?
What are some things you find demotivating?
What is something I can do as a supervisor to make sure this is a great place to work?
What are your interests and hobbies?
Tell me something unusual about yourself.

STEP 2: Capture their answers. Sum them up in four or five key points that express their preferences.

STEP 3: Create an index-sized card. It should have their name and contact info at the top and possibly their photo. Underneath, list the person's preferences.

Here is a sample card:

Name: Jane D. Smith

Phone number: 123-456-7890

Email address: JaneDSmith@CompanyName.com

Here's What's Important to Me:

1. Tell me how I'm doing often. I need a lot of feedback to feel confident I'm on the right track.

2. I want to be a better public speaker. Give me opportunities to present whenever possible.

3. Don't put me on the spot. As an introvert, I need time to process questions and think about my answers.

4. Personal Info: I have two children, a boy and a girl. I enjoy hiking and gardening. I have a vegetarian cooking blog.

STEP 4: Keep a copy of the card on hand and review it periodically. Distribute a copy to all colleagues and coworkers who work closely with the person.

Name: ________________________________

Phone number: ________________________________

Email address: ________________________________

Here's What's Important to Me:

Special thanks to Sally Jewell with the Pensacola Blue Wahoos for assisting in the creation of this tool.

32 Put "Official" (Written) Standards of Behavior in Place

TOOL: Standards of Behavior Worksheet and Sample

When people are on their best behavior, they communicate more clearly, there are fewer unpleasant conversations, and everyone enjoys being at work more. Collaboration, innovation, and consistency improve. It all adds up to more engaged employees, improved performance, and happier customers.

But unless you spell out what good behavior looks like, everyone may not know. That's why developing a written Standards of Behavior contract is so powerful. It standardizes everything, from how we interact with clients and customers to the nitty-gritty of how we behave toward leaders and coworkers.

Everyone needs to be involved in developing the contract. Give this worksheet to leaders and employees and ask everyone to share their ideas. Then you can put them all together in a final document and have everyone sign it.

Standards of Behavior Worksheet

We need your help! Below, please share your ideas on how we can better serve our customers and each other. We'll consider everyone's feedback and put it all together in an "official" document that everyone, including leaders, will sign.

SECTION 1:
Which behaviors can help us meet our company's long-term objectives?
Objectives (Note: Leaders, please list the key objectives before distributing!)

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Suggested Behaviors (EXAMPLE: Suppose an objective is to increase repeat business, yet a customer satisfaction survey shows customers feel rushed off the phone. A suggested behavior might be: Anytime an employee talks to a customer, they end the call or interaction by saying, "Are you having any other problems with our product or service that you'd like to tell me about? I have time.")

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SECTION 2:
Which behaviors show a strong commitment to leaders and coworkers?
(EXAMPLE: "I will discuss issues directly with coworkers rather than going to other people.")

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SECTION 3:
Which behaviors positively impact the customer experience?
(EXAMPLE: "I will address customers by name as soon as I hear it or see it in writing.")

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SECTION 4:
Which behaviors exemplify appropriate and respectful use of technology?
(EXAMPLE: "I will not check social media accounts or make posts during work hours.")

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SECTION 5:
Which behaviors create a positive workplace?
(EXAMPLE: "I will strive to say at least three positive statements for each negative one.")

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Please return your answers to ______________________________ by _______________. Thank you!
(person in charge) (date)

A Few Helpful Tips:

1. Be very specific in your wording. Don't write, "Be polite to coworkers." Instead, write, "Say thank you when someone helps you." Or, "Say good morning when you pass someone's office as you arrive in the morning."

2. Before you finalize the document, give employees the final sign-off. This makes buy-in a lot more likely.

3. Explain the *why* behind the standards when you roll them out to everyone. Connect them to your mission, vision, and values.

4. If someone violates a standard, hold them accountable. This probably means just reminding them what the document says on the issue. Most people want to do the right thing, but we are all human.

5. If you violate a standard, admit it and apologize.

6. Treat the Standards of Behavior as a living document. Change it as needed.

Special thanks to Derek Diamond with the Pensacola Blue Wahoos for assisting in the creation of this tool.

SAMPLE STANDARDS OF BEHAVIOR

Commitment to Coworkers

I recognize that my coworkers and I have a common destiny. What's good for them is good for me (and vice versa). In everything I say and do I will keep this truth in mind. Therefore . . .

I will strive to be helpful, and assist coworkers whenever possible. This includes coworkers in other departments.

I will always treat coworkers with respect. If I would consider it disrespectful if said to me, I won't say it to them, either.

I will welcome feedback from team members. Rather than being defensive, I will say thank you. I will be respectful when approaching coworkers with criticisms, and offer them in private rather than public settings.

I will be mindful of coworkers' deadlines. I will respond promptly when they reach out with questions, comments, or concerns.

I will respect their time. I won't disrupt their schedules with meetings that run long or show up late to meetings.

If at all possible I will come to work on time. If I see I'm going to be late I will let people know ahead of time.

When I am absent, others have to pick up my slack. Therefore, I won't miss work unless I absolutely have to.

I will take ownership of projects. When problems come up I will do my best to solve them (regardless of where they come from).

I will strive to resolve issues with coworkers one on one if possible.

I won't talk about people or gossip behind their backs.

I will show respect for others' backgrounds and beliefs, even when they differ from my own.

When I take time off, I will set my coworkers up for success by letting them know what is going on so that work can continue seamlessly.

I will meet my deadlines. I will complete my assignments.

I will welcome new team members, mentor them when possible, and do everything in my power to help them succeed.

Creating a Positive Workplace

I will say, "Good morning" and greet people when I arrive at work. I will say, "Goodbye" when I leave to go home.

I will keep my office clean. I will also respect community spaces and clean up after myself.

I will strive to say three positive statements for every one negative.

I will avoid discussing controversial political or religious topics.

I will talk quietly when I am on the phone (or shut my door).

I will use good manners. This includes saying "please," "thank you," and "excuse me" when the occasion calls for it. It also includes knocking on doors.

Technology Etiquette

I will use my phone and computer for work purposes only.
I will not check social media accounts or make posts during work hours. Even on my private accounts I will never post negative statements or sensitive information about my company, coworkers, clients, or customers.
I will use tools that make things easier on people, such as setting an away message on my email. I will practice good email etiquette. For example:

- I will include a clear and direct subject line.
- I will avoid overwhelming people by copying them on unnecessary emails.
- I will craft emails carefully: I will include all relevant details but keep messages as short and to the point as possible.

I will be aware of potential computer viruses. I will open email from outside the facility only if I know the sender.
If at all possible I will not bring my cell phone to meetings. If I do I will check messages only during breaks.

Commitment to Clients

As often as possible I will put the client's needs ahead of my own. I will never forget that they are why we are in business and why my coworkers and I have jobs. Therefore . . .

I will do the best possible work I can to meet their needs.
I will be mindful of clients' privacy, and keep their information confidential.
I will be polite and open when speaking, and be aware of my body language during interactions. I will acknowledge and maintain eye contact when interacting with them.
I will always treat clients in a professional and respectful way.
I will not complain about or say negative things about clients to my coworkers.
I will avoid discussing internal issues in public, or in the presence of clients.
I will check in regularly with clients to see if their expectations are met.
I will always be positive, upbeat, and courteous when interacting with clients.
I will never be frustrated when customers interrupt my day, remembering that meeting their needs are why we are in business.
If I'm unable to meet a customer's needs on my own, I will find a teammate who is able to do so. When handing over clients, I will introduce colleagues and reassure the client that they will provide excellent service.
When I know a customer is dissatisfied, I will be proactive in correcting the situation.
I will strive for excellence in service recovery by using LEAP:

- **L:** Listen
- **E:** Empathize
- **A:** Apologize ("I'm sorry we did not meet your expectations.")
- **P:** Perform whatever action is necessary to correct the situation

Communicating with Clients and Customers

When a client calls or visits I will always introduce myself, and let them know what my role is.
I will say, "May I ask who is calling?" and direct their call appropriately if I can't handle it myself.
I will respond as quickly as possible when a client reaches out with a question.
I will promptly return missed calls and emails. I will not let a client go without a response for longer than 24 hours, even if I have to ask a colleague to respond in my absence.
I will learn clients' names, and use them when communicating.
I will avoid unpleasant behaviors, such as chewing gum or eating while on the phone.
I will avoid slang or abbreviations in emails.
I will always circle back and check in with those waiting on my response, even if I am not yet able to resolve their initial inquiry.
I will always be courteous of the client's time. If I must place them on hold, or if I can't respond to their email in a prompt and helpful manner, I will say, "I am so sorry for the inconvenience."
I will make things easier on the client by giving them an introduction and specific contact information when transferring them to another person. Also, I will take time to explain the situation to my colleagues when handing the client off to them so that the client doesn't have to repeat themselves over and over.
I will make a personal, brief, and effective voice-mail message so clients know who they are contacting when I'm unable to answer the phone.
I will narrate to the client what my next steps are when finishing the conversation, whether that means looking for more information, resolving their concern, or simply passing on a message to a colleague.
I will avoid frustrating clients with automated recordings, and will make every effort to connect them with a real person as soon as possible.
I will try hard to be available to take calls and respond to emails during business hours.
I will say thank you after every client interaction.

By signing below, I indicate that I have been given a copy of these Behavior Standards, and that I will try to uphold these standards to the best of my ability.

Name: _______________
Date: ________________

One copy will be signed and filed with Human Resources. Second copy will stay with employee.