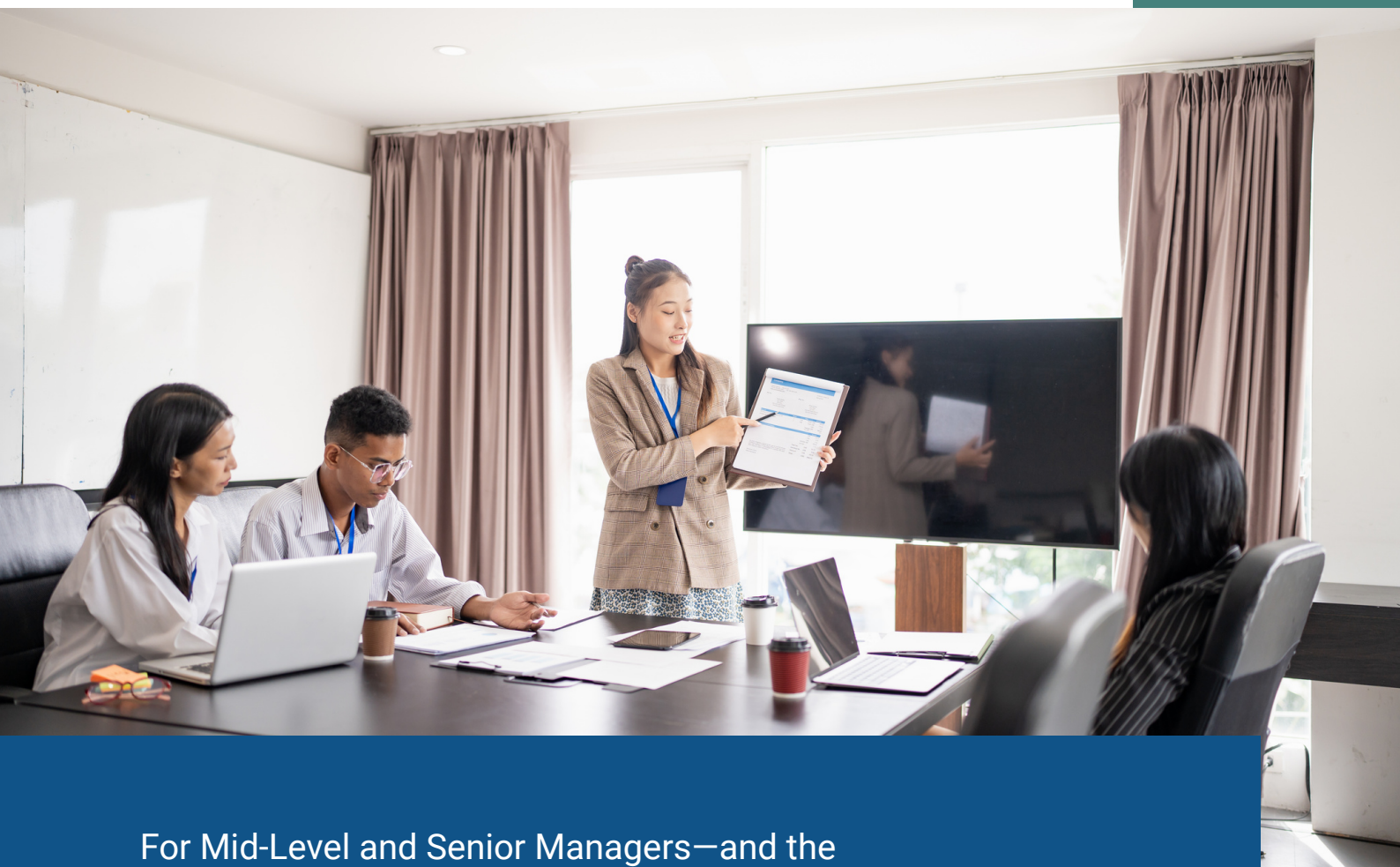


# LEADERSHIP DEVELOPMENT

Best-Practices **Playbook**

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For Mid-Level and Senior Managers—and the  
CEOs and Business Owners Who Develop Them

**Capacity Building Solutions, Inc.**  
Evidence translated into practical action

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# TABLE OF CONTENTS

Use this playbook in the way that best fits your role and current need. The opening assessment will point you toward the most useful sections. The page numbers below refer to the printed document; headings also make the electronic version easy to search and navigate.

| Section                                                | Page |
|--------------------------------------------------------|------|
| Where Should I Start? Initial Leadership Assessment    | 04   |
| How to Use This Playbook                               | 09   |
| Executive Summary: What the Evidence Says              | 12   |
| Optional Deep Dive – Why the Framework Works           | 13   |
| Part I – The Leadership Standard                       | 16   |
| Special Section – Leading With Artificial Intelligence | 22   |
| Part II – Leadership Capability Assessment             | 28   |
| Part III – Personality and Leadership Profiling        | 34   |
| Part IV – The Professional Development Framework       | 37   |
| Part V – Individual Development Planning               | 39   |
| Part VI – CEO and Business-Owner Implementation Guide  | 41   |
| Part VII – Measurement and Progress                    | 46   |
| Part VIII – Field Tools for the Leadership Journey     | 50   |
| Part IX – The Leadership Curriculum                    | 61   |
| Part X – Top Resources and Reading                     | 62   |
| Plain-Language Guide to Common Terms                   | 63   |
| Bibliography and Evidence Base                         | 65   |
| Final Leadership Development Commitments               | 70   |

## What each major section is designed to do

| Section                         | Why it is here                                                                               | What you should leave with                                                           |
|---------------------------------|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Initial Assessment              | Prevents the reader from treating every leadership skill as equally urgent.                  | A small number of likely priorities and a clear place to begin.                      |
| Leadership Standard             | Defines the broad expectations of a well-rounded mid-level or senior leader.                 | A shared language for what good leadership looks like in this organization.          |
| Leading With AI                 | Builds the judgment to use AI productively, safely, and responsibly.                         | A personal AI skill plan and a well-chosen pilot tied to a business result.          |
| Capability Assessment           | Provides a more complete diagnosis using behavior and evidence.                              | One or two development priorities supported by examples.                             |
| Personality and Profiling       | Explains when profiles, emotional-intelligence tools, derailers, and 360 feedback add value. | The right assessment approach without labeling or overinterpreting people.           |
| Development Framework           | Shows how leaders actually grow through real work.                                           | A practical mix of experience, feedback, coaching, learning, and reflection.         |
| Individual Development Planning | Turns insight into a focused, time-bound plan.                                               | An IDP tied to a business need, real assignment, and observable progress.            |
| CEO Implementation Guide        | Explains how to introduce and sustain the framework across a company.                        | Clear ownership, rollout steps, governance, and executive follow-through.            |
| Measurement                     | Separates program activity from genuine leadership improvement.                              | A balanced view of behavior, team impact, and business contribution.                 |
| Field Tools                     | Provides practical forms for common leadership moments.                                      | The right tool at the moment it can improve a conversation, decision, or assignment. |
| Curriculum and Resources        | Supports a cohort, facilitated program, or deeper self-directed learning.                    | A development sequence and targeted resources—not an obligation to use everything.   |

# WHERE SHOULD I START? INITIAL LEADERSHIP ASSESSMENT

## START HERE | Typical time: 15–20 minutes

Take this short assessment before reading the full playbook. It is a starting-point conversation, not a test and not a performance rating.

Most leaders can find something to improve in every category. That is not the objective. The purpose is to identify the one or two areas that would make the greatest difference in your current role and in the business. Answer honestly based on what you do consistently not what you understand, intend to do, or occasionally do on your best day.

## Rating scale

| Rating | Use this description                                           |
|--------|----------------------------------------------------------------|
| 1      | This is a clear weakness or recurring problem.                 |
| 2      | I demonstrate this sometimes, but not reliably.                |
| 3      | I handle this effectively in normal circumstances.             |
| 4      | I handle this well, including in difficult situations.         |
| 5      | This is a consistent strength, and I help others improve here. |

## A. Leading Myself

| Statement                                                                                 | 1 | 2 | 3 | 4 | 5 |
|-------------------------------------------------------------------------------------------|---|---|---|---|---|
| I keep commitments, admit mistakes, and behave consistently with our values.              |   |   |   |   |   |
| I remain constructive under pressure and recognize when my emotions are affecting others. |   |   |   |   |   |
| I protect enough time and energy to think, prepare, and lead rather than simply react.    |   |   |   |   |   |
| I actively seek honest feedback and make visible changes based on what I hear.            |   |   |   |   |   |

## B. Leading and Developing People

| Statement                                                                              | 1 | 2 | 3 | 4 | 5 |
|----------------------------------------------------------------------------------------|---|---|---|---|---|
| People understand what I expect, why it matters, and what success looks like.          |   |   |   |   |   |
| I delegate meaningful ownership instead of holding on to too much or taking work back. |   |   |   |   |   |
| I coach people to think and grow rather than answering every question for them.        |   |   |   |   |   |
| I give timely feedback and address difficult performance or behavior issues directly.  |   |   |   |   |   |

## C. Getting Results Through the Team

| Statement                                                                                  | 1 | 2 | 3 | 4 | 5 |
|--------------------------------------------------------------------------------------------|---|---|---|---|---|
| My team knows its few most important priorities and measures.                              |   |   |   |   |   |
| We have a dependable rhythm for reviewing commitments, decisions, and obstacles.           |   |   |   |   |   |
| I address missed commitments early while still seeking to understand the cause.            |   |   |   |   |   |
| My team delivers results without depending on constant firefighting or my personal rescue. |   |   |   |   |   |

## D. Understanding the Business and Thinking Strategically

| Statement                                                                                                                      | 1 | 2 | 3 | 4 | 5 |
|--------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| I understand how our company makes money and the drivers of revenue, margin, cash, capacity, and value.                        |   |   |   |   |   |
| I know enough about sales, marketing, operations, people, technology, customer experience, and risk to ask informed questions. |   |   |   |   |   |
| I frame the real problem, consider alternatives, and make clear tradeoffs before acting.                                       |   |   |   |   |   |
| I balance today's demands with the capabilities and choices the business will need in the future.                              |   |   |   |   |   |

## E. Working With Leadership Peers and Leading Across the Company

| Statement                                                                                                     | 1 | 2 | 3 | 4 | 5 |
|---------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| I put the good of the whole company ahead of protecting my department.                                        |   |   |   |   |   |
| I build trust with leadership peers, address tension directly, and support final decisions.                   |   |   |   |   |   |
| I willingly share information, talent, resources, and credit when the enterprise need is greater.             |   |   |   |   |   |
| I can lead organization-wide work that requires influence across functions without having complete authority. |   |   |   |   |   |

## F. Leading Change and Building the Future

| Statement                                                                                                  | 1 | 2 | 3 | 4 | 5 |
|------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| I explain why change is needed, listen to concerns, and keep people moving forward.                        |   |   |   |   |   |
| I test assumptions, learn from results, and adjust rather than defending a weak plan.                      |   |   |   |   |   |
| I develop successors and create opportunities for other people to grow.                                    |   |   |   |   |   |
| I improve systems and capabilities so the business becomes less dependent on any one person, including me. |   |   |   |   |   |

## G. Leading With Artificial Intelligence

| Statement                                                                                                                  | 1 | 2 | 3 | 4 | 5 |
|----------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| I can identify work where AI may improve speed, quality, insight, or capacity—and work where it should not be used.        |   |   |   |   |   |
| I give AI clear context and instructions, then check important facts, calculations, assumptions, and sources.              |   |   |   |   |   |
| I protect confidential information and know when privacy, security, legal, ethical, or human-resources review is required. |   |   |   |   |   |
| I can lead a small AI experiment, involve the people affected, and measure whether it creates real business value.         |   |   |   |   |   |

## Score and interpret your results

Add the four ratings in each section. Each category will total between 4 and 20. Lower scores point to possible development needs, but the lowest score is not automatically the right priority. Also consider the importance of the capability to your role, the cost of no change, and what the business needs from you now.

| Category                                                     | Score | Business importance:<br>Low / Medium / High | Priority now? |
|--------------------------------------------------------------|-------|---------------------------------------------|---------------|
| Leading Myself                                               |       |                                             |               |
| Leading and Developing People                                |       |                                             |               |
| Getting Results Through the Team                             |       |                                             |               |
| Understanding the Business and Thinking Strategically        |       |                                             |               |
| Working With Leadership Peers and Leading Across the Company |       |                                             |               |
| Leading Change and Building the Future                       |       |                                             |               |
| Leading With Artificial Intelligence                         |       |                                             |               |

## Use the results to choose your path

| If your priority is...                        | Begin with                                                                                           | Most useful tools                                                                |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| Leading myself                                | Part I: Self-leadership and character;<br>Part III when a profile would help.                        | Monthly Learning Log;<br>Stakeholder Pulse; Quarterly Progress Review.           |
| Leading and developing people                 | Part I: Talent leadership and coaching;<br>Part V: IDP.                                              | One-on-One Agenda; Delegation Contract; Coaching Conversation; Feedback Planner. |
| Getting results through the team              | Part I: Direction, execution, and accountability; Part VII: Measurement.                             | Decision Quality Checklist; Delegation Contract; After-Action Review.            |
| Business understanding and strategic thinking | T-shaped leadership expectation;<br>Functional Fluency Self-Check;<br>Strategic Thinking Diagnostic. | Decision Quality Checklist;<br>Stretch Assignment Charter.                       |
| Peer collaboration and enterprise leadership  | Leadership Team section; Enterprise Leadership assessment.                                           | Enterprise Initiative and Peer Collaboration Charter;<br>Stakeholder Pulse.      |

| If your priority is...               | Begin with                                                           | Most useful tools                                                                            |
|--------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Change and building the future       | Change, learning, and innovation; Development Framework; Curriculum. | Stretch Assignment Charter; After-Action Review; Talent Review Card.                         |
| Leading with artificial intelligence | Special Section: Leading With Artificial Intelligence.               | AI Leadership Use-Case and Decision Canvas; Decision Quality Checklist; After-Action Review. |

Before finalizing a priority, discuss the results with your boss or coach. Ask: “Which one or two changes would most improve my contribution over the next six to twelve months?” The conversation matters more than the arithmetic.



# How to Use This Playbook

Leadership does not improve because someone attends a class, completes a personality profile, or reads a good book.

It improves when a leader sees the right gap, chooses a small number of meaningful behaviors, practices them in real work, receives useful feedback, and stays with the process long enough for others to notice the difference. This playbook turns that idea into a repeatable system.

It is designed for small and mid-sized organizations that need practical development without building a corporate university. The framework is rigorous enough to be credible and simple enough to use. The academic research sits underneath the recommendations, but the language and tools are built for working leaders.



## The seven jobs this playbook performs

- 01 Defines the leadership practices that matter most at mid-level and senior levels.
- 02 Provides a baseline Leadership Capability Assessment for the individual and the organization.
- 03 Creates a development framework built around real work, feedback, coaching, and reflection.
- 04 Supplies an Individual Development Plan process that turns insight into action.
- 05 Recommends leadership resources, including ten books every leader should read.
- 06 Provides reusable tools for meetings, delegation, feedback, coaching, decisions, and development assignments.
- 07 Creates a scorecard for measuring behavioral change, team results, and business impact.

## The operating principle

Diagnose before you prescribe. Develop through the work. Measure what changes. Hold the standard.

## Do not try to use everything at once

This is a complete system, but the reader does not need to complete it from front to back. A leader can begin with one assessment, one development priority, one real assignment, and one monthly coaching conversation. The deeper tools are available when the situation requires them. Simplicity at the point of use is a design feature, not a lack of rigor.

| If you are...              | Start here                                            | Then use                                                                       |
|----------------------------|-------------------------------------------------------|--------------------------------------------------------------------------------|
| A CEO or business owner    | Executive Summary and Part VI                         | Organizational Bench Assessment, 90-Day Checklist, and Scorecard.              |
| A senior leader            | Ten Capabilities and Leadership Capability Assessment | Personality/360 guidance, IDP, Stretch Assignment, and Quarterly Review.       |
| A mid-level manager        | Assessment and IDP                                    | One-on-One, Delegation, Coaching, Feedback, and Learning Log tools.            |
| A facilitator or HR leader | Development Framework and Curriculum                  | Assessment architecture, implementation roles, measurement, and evidence base. |

## Three ways to experience the playbook

| Path           | Use it when...                                                                                  | What to read                                                                                |
|----------------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| START HERE     | You want the essentials without becoming overwhelmed.                                           | Executive Summary; Ten Capabilities; your assessment; one IDP; one field tool.              |
| PUT IT TO WORK | You are actively developing yourself, another leader, or a cohort.                              | Assessment; Development Framework; IDP; Measurement; Field Tools; Curriculum.               |
| GO DEEPER      | You are a CEO, HR leader, coach, facilitator, or reader who wants the research and full system. | Intellectual foundations; profiling architecture; implementation; governance; bibliography. |

## The five-question quick start

A leader can begin with five questions. The rest of the playbook supplies deeper guidance and tools when they are needed.

08 What does the business need from me now?

09 What do I need to do differently?

10 Where will I practice it in real work?

11 Who will give me honest feedback?

12 How will we know I am improving?

## Your first 30 days

| Week | Action                                                                                             | Output                                            |
|------|----------------------------------------------------------------------------------------------------|---------------------------------------------------|
| 1    | Read the Executive Summary and Ten Capabilities. Ask your boss which two matter most in your role. | Shared view of the role and business need.        |
| 2    | Complete the Leadership Capability Assessment. Compare examples with your boss.                    | One or two priorities—not a long list.            |
| 3    | Write a simple IDP and select one real assignment that requires the new behavior.                  | A focused plan with practice built into the work. |
| 4    | Choose feedback partners and schedule the first monthly progress conversation.                     | A visible rhythm for feedback and follow-through. |

## Suggested sequence

| Phase       | Action      | Output                                                               |
|-------------|-------------|----------------------------------------------------------------------|
| 1. Align    | Weeks 0–2   | Business priorities, leadership expectations, executive sponsor      |
| 2. Diagnose | Weeks 2–4   | Self-assessment, manager input, selected profiles, baseline measures |
| 3. Focus    | Weeks 4–5   | One or two development priorities and an approved IDP                |
| 4. Practice | Months 2–9  | Stretch assignments, coaching, peer learning, feedback, reflection   |
| 5. Measure  | Quarterly   | Behavior, team, operating, and business evidence                     |
| 6. Sustain  | Months 9–12 | Reassessment, succession implications, next development cycle        |

## Executive Summary:

### What the Evidence Says

The strongest leadership-development programs share a handful of features. They are connected to the strategy, based on a clear diagnosis, supported by the leader's boss, spread over time, and tied to real assignments. They combine knowledge with practice, feedback, coaching, and reflection. They also measure whether behavior and results changed not simply whether participants enjoyed the program. These conclusions are consistent with major reviews and meta-analyses of leadership training, workplace learning, coaching, feedback, and experience-driven development (Aguinis & Kraiger, 2009; Day et al., 2014; Lacerenza et al., 2017; Salas et al., 2012).

| What works                          | Plain-language meaning                                                                    | What to avoid                                                    |
|-------------------------------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| Clear needs analysis                | Start with the business and role, then identify the few leadership gaps that matter most. | Sending everyone through the same generic curriculum.            |
| Repeated practice over time         | Use short learning cycles followed quickly by application on the job.                     | One-time events with no follow-through.                          |
| Real-work assignments               | Make the business the classroom: delegate, lead a change, solve a cross-functional issue. | Learning that never affects a real decision or result.           |
| Feedback from several sources       | Compare self-view with how the boss, peers, and team experience the leader.               | Using self-report alone or delivering feedback without support.  |
| Coaching and manager involvement    | Hold regular conversations that convert insight into action and accountability.           | Treating development as HR's responsibility.                     |
| A small number of goals             | Focus on one or two behaviors with visible evidence of progress.                          | A long wish list that guarantees shallow effort.                 |
| Psychological safety plus standards | Make it safe to learn while remaining direct about performance expectations.              | Confusing support with lowered standards.                        |
| Measurement at several levels       | Track behavior, team climate, execution, and business outcomes.                           | Counting attendance, hours, and satisfaction as proof of impact. |

The best summary is simple: leadership development works when it is treated as a business process rather than an educational benefit. Training can help, but transfer happens back at work. The leader's boss, the assignments selected, the quality of feedback, and the discipline of follow-up determine whether new capability becomes visible performance.



## OPTIONAL DEEP DIVE WHY THE FRAMEWORK WORKS

### GO DEEPER | Typical time: 15–20 minutes

This section explains the thinking and research underneath the playbook. A manager can skip it and go directly to Part I without losing the practical journey.

Most leadership frameworks mix traits, skills, behaviors, values, and business outcomes into one long list. That makes them difficult to use and even harder to measure. This playbook separates them. A leader brings personal tendencies and values to the work, applies capabilities through observable behavior, influences teams and systems, and contributes to business results. Each layer needs a different kind of evidence.

### Leader development and leadership development

Leader development strengthens the individual: self-awareness, judgment, knowledge, skill, and capacity. Leadership development strengthens the connections and conditions through which leadership happens: shared direction, trust, decision rights, coordination, culture, and the ability to lead across boundaries. Strong organizations need both. Improving an individual without improving the surrounding system often produces frustration; changing the system without increasing leader capability produces weak execution (Day, 2000; Day et al., 2014).

| Layer                  | Development focus                                                                                                  | Best evidence                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| Leading self           | Character, self-awareness, learning agility, emotional regulation, energy, and judgment.                           | Reflection, behavior under pressure, feedback, and follow-through.                         |
| Leading others         | Clarity, coaching, accountability, delegation, team effectiveness, and talent development.                         | Direct-report and peer observations, team practices, and people outcomes.                  |
| Leading the enterprise | Strategy, business acumen, systems thinking, cross-functional influence, culture, change, and resource allocation. | Decision quality, enterprise results, stakeholder outcomes, and organizational capability. |

## The Leadership Growth Chain

The framework uses a simple theory of change. It does not assume that a good workshop automatically produces a better business. It makes the intermediate steps visible so the organization can diagnose where progress is breaking down.

| Link                      | Question                                                                  | Evidence                                                                   |
|---------------------------|---------------------------------------------------------------------------|----------------------------------------------------------------------------|
| 1. Business need          | What must the organization become better able to do?                      | Strategy, customer, operating, talent, or risk priority.                   |
| 2. Role demand            | What must this leader deliver, decide, and enable?                        | Role outcomes, time horizon, decision rights, stakeholders.                |
| 3. Leadership behavior    | What should the leader do differently and what should others observe?     | One or two specific behavior goals.                                        |
| 4. Development experience | Where will the leader repeatedly practice under real conditions?          | Stretch assignment, deliberate practice, feedback, and coaching.           |
| 5. Team or system change  | What becomes clearer, faster, healthier, or more reliable?                | Team pulse, decision speed, accountability, capacity, or process evidence. |
| 6. Business contribution  | Which important result should improve, and how did leadership contribute? | Customer, financial, operating, people, innovation, or risk result.        |

## Five design principles



### Development is contextual.

There is no universally ideal leader detached from role, strategy, culture, and moment. The same behavior can help in one situation and harm in another.



### Capability is necessary but not sufficient.

Results also depend on authority, information, incentives, relationships, capacity, and organizational design. Diagnose the system before blaming the person.



### Behavior is the bridge.

Personality and insight matter only when they improve choices and observable behavior. Business outcomes are too distant to serve as the only measure.



### Challenge needs support.

Developmental assignments work best when they stretch the leader, provide feedback, and do not exceed the support and capacity needed to learn (DeRue & Wellman, 2009).



## Development is an operating rhythm.

Capability grows through cycles of action, feedback, reflection, adjustment, and renewed action—not through exposure to ideas alone.

## How evidence is treated

Not every useful leadership idea has the same level of proof. This playbook gives greatest weight to meta-analyses, systematic reviews, and well-designed field studies; then to established theory and replicated organizational research; and finally to practitioner frameworks that are useful, plausible, and consistent with stronger evidence. Popularity alone is not treated as validation. Vendor claims are considered, but independent evidence carries more weight.

| Evidence tier | Meaning in this playbook                                                                                    |
|---------------|-------------------------------------------------------------------------------------------------------------|
| A – Strong    | Supported by multiple high-quality studies, meta-analyses, or systematic reviews.                           |
| B – Credible  | Supported by solid theory and a meaningful body of organizational research, with contextual limits.         |
| C – Practical | Useful practitioner method or instrument; apply with judgment and avoid claims stronger than the evidence.  |
| Caution       | Evidence is limited, mixed, proprietary, or commonly overinterpreted. Use for reflection, not as a verdict. |



## PART I

# THE LEADERSHIP STANDARD



### START HERE | Typical time: 20 minutes

Read this section to understand what the organization expects from a well-rounded mid-level or senior leader. Focus first on the capabilities most important in your current role.

## 1. The Shift From Managing Work to Leading the System

Mid-level and senior leadership requires more than being a strong manager of individual contributors. The leader must translate strategy into priorities, create clarity across functions, build other leaders, allocate resources, manage tradeoffs, and shape the conditions in which people perform. As scope grows, technical expertise becomes less decisive and judgment, people leadership, and systems thinking become more important.

| Level              | Primary leadership work                                                                            | Common trap                                                 |
|--------------------|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| Front-line manager | Set expectations, coach performance, build daily discipline, develop individual contributors.      | Doing the team's work instead of leading it.                |
| Mid-level manager  | Lead managers, integrate functions, translate strategy, improve systems, build bench strength.     | Staying buried in the details and solving every escalation. |
| Senior leader      | Set direction, make enterprise tradeoffs, shape culture, allocate talent and capital, lead change. | Optimizing a function at the expense of the whole business. |

## 2. The Ten Leadership Capabilities

| Capability                         | What good looks like                                                                                                   |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| 1. Self-leadership and character   | Acts with integrity, manages emotions and energy, seeks truth, and follows through.                                    |
| 2. Strategic thinking and judgment | Sees the whole, separates signal from noise, makes tradeoffs, and decides with incomplete information.                 |
| 3. Business and financial acumen   | Understands how the company makes money and connects leadership choices to customers, cash, capacity, risk, and value. |

| Capability                                       | What good looks like                                                                                                                                                                               |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4. Direction and alignment                       | Turns strategy into a small number of clear priorities, roles, measures, and decisions.                                                                                                            |
| 5. Communication and influence                   | Listens, communicates plainly, adapts to the audience, and earns commitment across boundaries.                                                                                                     |
| 6. Execution and accountability                  | Sets standards, establishes operating rhythms, confronts misses early, and delivers results.                                                                                                       |
| 7. Talent leadership and coaching                | Selects well, delegates real ownership, gives useful feedback, coaches, and builds successors.                                                                                                     |
| 8. Team and culture leadership                   | Builds trust and constructive conflict, reinforces values through behavior, and creates healthy team norms.                                                                                        |
| 9. Change, learning, and innovation              | Explains why change matters, engages people, runs disciplined experiments, learns, and adjusts.                                                                                                    |
| 10. Enterprise leadership and peer collaboration | Acts for the whole organization, collaborates with leadership peers, shares resources, leads across silos, owns enterprise priorities, anticipates second-order effects, and manages stakeholders. |

## The T-shaped leadership expectation

A capable leader needs depth in a primary function and enough breadth to make good enterprise decisions. The goal is not to turn every leader into an expert in everything. The goal is to prevent functional blind spots, improve the quality of cross-functional questions, and help leaders understand how the whole business creates value. Leaders should be able to follow the logic, interpret the core measures, see interdependencies, and know when deeper expertise is required.

| Business area           | Every mid-level and senior leader should understand                                                                       |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Strategy                | Customers and markets; competitive advantage; choices and tradeoffs; capabilities; risks; milestones; leading indicators. |
| Finance                 | Income statement, balance sheet, cash flow, working capital, margin, return on investment, forecasts, and unit economics. |
| Sales                   | Ideal customer, pipeline, conversion, pricing, sales capacity, customer concentration, and revenue quality.               |
| Marketing               | Positioning, demand generation, brand promise, channels, customer acquisition economics, and market feedback.             |
| Operations              | Capacity, throughput, quality, cost, cycle time, constraints, process reliability, and continuous improvement.            |
| People and organization | Role clarity, talent selection, performance, compensation logic, engagement, succession, culture, and workforce capacity. |

| Business area               | Every mid-level and senior leader should understand                                                                               |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Customer experience         | Customer needs, journey, service standards, retention, complaints, loyalty, and the operational causes of customer outcomes.      |
| Technology, data, and AI    | Core systems, data quality, cybersecurity, automation, AI opportunities and risks, adoption, and return on technology investment. |
| Risk, legal, and governance | Material operational, financial, compliance, reputation, safety, and continuity risks; escalation and decision governance.        |
| Enterprise integration      | How a decision in one function changes demand, capacity, people, cash, customer experience, risk, and execution elsewhere.        |

## Interactive exercise – Follow one decision across the business

Choose a live decision—for example, entering a market, changing price, hiring a senior leader, adopting AI, adding capacity, or acquiring a company. Complete the map before recommending action.

| Lens                                      | Questions and notes |
|-------------------------------------------|---------------------|
| Strategic fit and tradeoffs               |                     |
| Customer and market effect                |                     |
| Revenue and pricing effect                |                     |
| Operating capacity and process effect     |                     |
| People, role, and culture effect          |                     |
| Cash, margin, and investment effect       |                     |
| Technology, data, and security effect     |                     |
| Legal, risk, and reputation effect        |                     |
| Second-order consequences                 |                     |
| Decision, assumptions, and review trigger |                     |

### 3. Best Practices That Consistently Matter



#### **Create clarity before demanding accountability.**

People cannot own a result they do not understand. Define the outcome, standard, decision rights, checkpoints, and consequences before judging performance.



#### **Use one-on-ones as the operating system.**

A useful one-on-one covers results, priorities, obstacles, decisions, feedback, development, and commitments. It is not a status dump that could have been an email.



#### **Delegate outcomes, not errands.**

Give capable people a result to own, the boundaries within which they can act, the resources they need, and a review rhythm matched to risk and readiness.



#### **Coach before taking the problem back.**

Ask what is happening, what matters, what has been tried, what options exist, and what the person recommends. Advice has a place, but premature rescue creates dependency.



#### **Give feedback close to the event.**

Describe the observable behavior, explain its impact, listen to the other person's view, agree on the next behavior, and follow up. Avoid labels, mind-reading, and accumulated resentment.



#### **Make difficult conversations timely and humane.**

Avoidance is expensive. Directness and respect belong together: be clear about the issue and standard while treating the person with dignity.



#### **Build leaders through consequential work.**

Use stretch assignments that are important enough to matter but supported enough to permit learning. Clarify what capability the assignment is intended to build.



#### **Lead with both empathy and standards.**

Understand the person and the context without losing sight of the commitment. Empathy improves diagnosis; it does not eliminate accountability.



### **Ask for disconfirming evidence.**

Good judgment requires curiosity about what could make the leader wrong. Invite dissent, run premortems, and separate confidence from certainty.



### **Protect leadership capacity.**

Priorities, meeting discipline, decision rights, health, and energy determine whether a leader can think. Chronic overload is not a badge of leadership; it is a system problem.

## **4. The Leadership Team Is a Team, Not a Collection of Functions**

A senior or mid-level leader has two jobs. The first is to lead a function well. The second is to help lead the whole company. The second job is often neglected because functional results are visible, urgent, and tied directly to the leader's identity. Enterprise leadership requires a broader standard: the leader must sometimes support a decision that helps the company while creating inconvenience, cost, or slower progress inside the leader's own area.



A strong leadership peer does not protect a silo, wait to be asked, or treat cross-functional work as somebody else's responsibility. The leader shares information early, asks for help, offers help, challenges peers directly and respectfully, keeps commitments, and supports the final decision once the team has decided. Constructive disagreement improves decisions when the team has enough trust and psychological safety to discuss the real issue (Edmondson, 1999).

### **What good peer leadership looks like**

- ◆ Puts enterprise results ahead of functional wins when the two conflict.
- ◆ Understands peer priorities and the pressures facing other functions.
- ◆ Raises cross-functional issues with the peer involved before escalating them upward.
- ◆ Shares talent, information, relationships, budget, and capacity when the enterprise need is greater.
- ◆ Offers candid challenge in the room and visible support after the decision.

- ◆ Avoids triangulation, territorial behavior, and “my team versus their team” language.
- ◆ Takes ownership of organization-wide initiatives, including projects with limited direct benefit to the leader’s function.
- ◆ Helps peers succeed, gives credit generously, and asks for help without treating it as weakness.
- ◆ Represents the leadership team’s decisions responsibly to employees.
- ◆ Measures personal success partly by the strength and performance of the entire leadership team.

### The enterprise-project test

Every developing mid-level and senior leader should periodically lead or co-lead work that crosses functions and matters to the whole company. Good assignments include strategy deployment, pricing, customer experience, digital or AI adoption, integration after an acquisition, workforce planning, enterprise risk, process redesign, new-market entry, or a company-wide operating system. The assignment should require influence without complete authority, competing priorities, shared resources, and measurable enterprise outcomes.

| Ask before assigning the project                                    | Notes |
|---------------------------------------------------------------------|-------|
| Why does this matter to the whole organization?                     |       |
| Which functions and stakeholders must succeed together?             |       |
| What enterprise outcome will take priority over local optimization? |       |
| What authority does the project leader have?                        |       |
| Where will peer collaboration be genuinely tested?                  |       |
| What resources may need to move across functional boundaries?       |       |
| How will disagreement and escalation be handled?                    |       |
| What will demonstrate leadership growth as well as project success? |       |

# Special Section

## Leading With Artificial Intelligence

### **PRACTICAL AI PATH | Typical time:** Begin with 30 minutes

You do not need to become a technologist. Learn enough to choose useful work, exercise sound judgment, protect people and information, and lead responsible adoption.

Artificial intelligence is becoming part of ordinary managerial work. A leader may use it to prepare for a meeting, summarize information, explore options, draft communication, find patterns, improve a process, or help a team learn. The opportunity is not simply to do old work faster. Used well, AI can create more time for judgment, relationships, coaching, customers, and the difficult decisions that require a responsible human leader.

The central rule is simple: AI may assist the work, but the leader still owns the outcome. Do not delegate accountability, ethics, empathy, or a consequential decision to a machine. Research shows meaningful productivity and quality gains when AI is used for suitable tasks, but also worse answers when people trust it outside its areas of strength. This uneven boundary is sometimes called the “jagged technological frontier” (Dell’Acqua et al., 2023).

### What AI can do—and what the leader must still do

| AI can help                                                      | The leader remains responsible for                                                   |
|------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Summarize, organize, compare, and create a useful first draft.   | Deciding what matters, checking accuracy, and approving the final work.              |
| Generate questions, alternatives, scenarios, and a premortem.    | Applying context, making tradeoffs, and choosing a course of action.                 |
| Analyze permitted data and surface patterns for investigation.   | Testing the meaning, spotting bias, and deciding whether the evidence is sufficient. |
| Role-play a customer, employee, peer, or difficult conversation. | Showing empathy, listening in the moment, and conducting the actual relationship.    |
| Suggest steps in a process and automate approved routine work.   | Redesigning the process, assigning controls, and monitoring unintended effects.      |

## Ten practical uses for leaders

- ◆ Prepare for an important meeting by asking AI to identify the decision, stakeholders, assumptions, and questions that need resolution.
- ◆ Turn lengthy notes, transcripts, or reports into themes, open questions, decisions, owners, and dates—using only approved systems and information.
- ◆ Improve a draft email, presentation, proposal, job description, or policy while preserving the leader's voice and accountability.
- ◆ Generate several strategic options, including a credible case against the leader's preferred answer.
- ◆ Run scenarios and premortems: "If this fails in twelve months, what likely caused it?"
- ◆ Translate a complex issue for different audiences, then have a knowledgeable person review the result.
- ◆ Practice a coaching, sales, feedback, negotiation, or difficult conversation before meeting the real person.
- ◆ Map a recurring workflow, identify delays and handoffs, and test where AI might remove low-value work.
- ◆ Explore customer, competitor, market, and operational information while checking important claims against reliable sources.
- ◆ Capture lessons, decisions, and institutional knowledge so the organization becomes less dependent on memory or any one person.



## The five broad AI capabilities every leader needs

| Capability  | In plain language                  | What good looks like                                                                                                               |
|-------------|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 1. Use      | Know what AI can help with.        | Starts with a real problem or outcome, chooses an appropriate tool, and gives it useful context and instructions.                  |
| 2. Judge    | Think critically about the output. | Checks facts, numbers, assumptions, sources, omissions, and fit with the situation; seeks disconfirming evidence.                  |
| 3. Protect  | Use information responsibly.       | Follows company rules; protects confidential, personal, customer, employee, and proprietary information; escalates high-risk uses. |
| 4. Redesign | Improve the whole workflow.        | Does not merely add an AI step to a poor process; clarifies roles, decisions, handoffs, controls, and the human review point.      |
| 5. Lead     | Help people adopt AI well.         | Explains why, involves employees, addresses fears honestly, provides practice, measures value, and remains accountable for impact. |

## A simple way to give AI a useful assignment

You do not need elaborate prompt formulas. Explain the work as you would to a capable new colleague: provide the situation, the outcome, the audience, the relevant information, the boundaries, and the form of the answer. Then ask the system what is missing before it begins.

| Include    | Example question                                                                |
|------------|---------------------------------------------------------------------------------|
| Situation  | What background does the AI need to understand the business and the moment?     |
| Outcome    | What decision, deliverable, or improvement are we trying to produce?            |
| Audience   | Who will use this, and what do they already know?                               |
| Evidence   | What approved facts, data, or source material should it use?                    |
| Boundaries | What must it avoid, protect, disclose, or leave for a human?                    |
| Output     | What form, length, tone, options, or criteria would make the answer useful?     |
| Challenge  | What assumptions might be wrong? What evidence would change the recommendation? |

## Guardrails: stop and involve the right expert

Pause before using AI when the work could materially affect a person's employment, compensation, safety, health, legal rights, access to credit, or reputation; when confidential or regulated information is involved; or when a mistake would be difficult to reverse. Involve the appropriate technology, security, privacy, legal, human-resources, financial, or functional expert. AI can inform a high-stakes decision, but it should not make that decision by itself.

- ◆ Use only tools and accounts approved by the organization. Do not paste sensitive information into a public AI service.
- ◆ Assume a fluent answer may still be wrong. Verify consequential facts, quotations, calculations, and citations at their original sources.
- ◆ Look for bias and missing voices, particularly in hiring, evaluation, promotion, customer access, and other people decisions.
- ◆ Be appropriately transparent when AI materially shapes work delivered to employees, customers, or decision makers.
- ◆ Protect human connection. Do not use AI to avoid a conversation, simulate false care, or outsource a message that the leader should personally own.
- ◆ Watch for overreliance and skill loss. People should still understand the work well enough to question the system and operate when it is unavailable.
- ◆ Treat cyber fraud, impersonation, manipulated media, and convincing misinformation as leadership risks—not merely technology problems.



## Interactive AI readiness check

Rate each statement from 1 (not yet) to 5 (consistently). Ask your boss or a trusted peer to rate the same behaviors. Select no more than two development priorities.

| Statement                                                                                                           | 1 | 2 | 3 | 4 | 5 |
|---------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| I can explain, in everyday language, what generative AI does well and where it can fail.                            |   |   |   |   |   |
| I begin with a business problem rather than a fashionable tool.                                                     |   |   |   |   |   |
| I provide enough context, boundaries, and evidence to obtain a useful result.                                       |   |   |   |   |   |
| I verify important outputs and can recognize when specialist review is needed.                                      |   |   |   |   |   |
| I understand our rules for confidential data, privacy, security, intellectual property, and approved tools.         |   |   |   |   |   |
| I can identify where a human must remain in the decision or relationship.                                           |   |   |   |   |   |
| I can redesign a workflow, not just speed up one task.                                                              |   |   |   |   |   |
| I can lead a small pilot with users, controls, measures, and stop-or-scale criteria.                                |   |   |   |   |   |
| I involve employees and address changes to roles, skills, workload, and trust.                                      |   |   |   |   |   |
| I can show whether an AI use created value in time, quality, revenue, cost, capacity, customer experience, or risk. |   |   |   |   |   |

## Your first 30 days

| Week                 | Action                                                                                                                      | Evidence of progress                                                        |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| 1 – Learn and choose | Review company policy and approved tools. Identify three recurring tasks; select one low-risk, high-frequency opportunity.  | A defined problem, current baseline, and named human owner.                 |
| 2 – Practice         | Use AI on the selected task at least three times. Keep examples of inputs, outputs, corrections, and time used.             | A learning log showing what improved and where human judgment was required. |
| 3 – Pilot            | Use Tool 15 to run a bounded pilot with one or two colleagues. Establish verification and data guardrails before beginning. | A small sample with feedback on quality, usefulness, trust, and risk.       |

| Week       | Action                                                                                           | Evidence of progress                                                     |
|------------|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| 4 – Decide | Compare the pilot with the old way. Stop, revise, or scale it. Choose the next skill to develop. | A decision supported by evidence and a 60-day follow-through commitment. |

## How to measure an AI use case

Agree on the baseline before the pilot. Measure only what the use case should plausibly change: time per task, cycle time, error or rework rate, quality, customer response, employee capacity, revenue, cost, or risk. Include the time spent reviewing and correcting the output. A fast first draft that creates hidden rework is not a productivity gain. Calculate value conservatively and record assumptions; do not convert every minute “saved” into cash unless the capacity is actually redeployed or cost is removed.

This approach reflects Edward Robinson’s practical AI guidance: use AI to expand a leader’s capacity and quality of thought, diagnose before prescribing, keep the person accountable, and demand credible return on investment. It also draws on the Ask Ed / Digital Ed concept of technology-supported reflection and decision coaching between human conversations—not the replacement of trusted advisers, coaches, or leadership judgment.



## PART II

# LEADERSHIP CAPABILITY ASSESSMENT



### START HERE | Typical time: 30–45 minutes

Complete the assessment yourself, then compare examples with your boss. Select only one or two priorities for the next development cycle.

This assessment is a development tool, not a clinical instrument and not a substitute for performance evidence. It should be completed by the leader and the leader's boss. For higher-stakes roles, add a short 360 process so that peers and direct reports can describe observable behavior. Differences in perspective are data to discuss, not scores to average away.

## Scoring scale

| Rating                  | Meaning                                                                                |
|-------------------------|----------------------------------------------------------------------------------------|
| 1 – Significant gap     | Rarely demonstrates the behavior; creates performance or relationship risk.            |
| 2 – Inconsistent        | Understands it but applies it unevenly or only with support.                           |
| 3 – Effective           | Demonstrates it reliably at the level the current role requires.                       |
| 4 – Strong              | Demonstrates it in difficult situations and helps others improve.                      |
| 5 – Enterprise strength | Models it broadly, builds systems around it, and raises the organization's capability. |

## Self-leadership and character

| Observable behavior                                                    | Self | Boss | Evidence / example |
|------------------------------------------------------------------------|------|------|--------------------|
| Keeps commitments and acts consistently with stated values.            |      |      |                    |
| Manages emotions and remains constructive under pressure.              |      |      |                    |
| Seeks candid feedback and acknowledges mistakes without defensiveness. |      |      |                    |

| Observable behavior                                               | Self | Boss | Evidence / example |
|-------------------------------------------------------------------|------|------|--------------------|
| Protects the energy, focus, and discipline required to lead well. |      |      |                    |

## Strategic thinking and judgment

| Observable behavior                                                      | Self | Boss | Evidence / example |
|--------------------------------------------------------------------------|------|------|--------------------|
| Connects daily work to the strategy and customer.                        |      |      |                    |
| Identifies the few issues that matter most and makes explicit tradeoffs. |      |      |                    |
| Uses facts, questions, and diverse views before deciding.                |      |      |                    |
| Makes timely decisions with clear assumptions and review points.         |      |      |                    |

## Business and financial acumen

| Observable behavior                                                                 | Self | Boss | Evidence / example |
|-------------------------------------------------------------------------------------|------|------|--------------------|
| Understands the business model and key drivers of revenue, margin, cash, and value. |      |      |                    |
| Uses relevant measures to diagnose performance.                                     |      |      |                    |
| Considers capacity, risk, return, and opportunity cost when allocating resources.   |      |      |                    |
| Explains business results in plain language and acts on them.                       |      |      |                    |

## Direction and alignment

| Observable behavior                                                        | Self | Boss | Evidence / example |
|----------------------------------------------------------------------------|------|------|--------------------|
| Translates strategy into clear priorities, outcomes, owners, and measures. |      |      |                    |
| Clarifies roles and decision rights across the team.                       |      |      |                    |
| Stops or deprioritizes work that does not support the strategy.            |      |      |                    |
| Repeats priorities until people can explain them without help.             |      |      |                    |

## Communication and influence

| Observable behavior                                                              | Self | Boss | Evidence / example |
|----------------------------------------------------------------------------------|------|------|--------------------|
| Listens to understand before responding.                                         |      |      |                    |
| Communicates difficult or complex issues directly and clearly.                   |      |      |                    |
| Adapts the message to the audience without changing the truth.                   |      |      |                    |
| Builds commitment across functions and levels without relying only on authority. |      |      |                    |

## Execution and accountability

| Observable behavior                                                  | Self | Boss | Evidence / example |
|----------------------------------------------------------------------|------|------|--------------------|
| Defines the standard and the evidence of completion.                 |      |      |                    |
| Uses a steady operating rhythm to review priorities and commitments. |      |      |                    |
| Addresses missed commitments early and explores root causes.         |      |      |                    |
| Delivers important results without creating avoidable chaos.         |      |      |                    |

## Talent leadership and coaching

| Observable behavior                                                      | Self | Boss | Evidence / example |
|--------------------------------------------------------------------------|------|------|--------------------|
| Selects people based on role requirements, capability, and values.       |      |      |                    |
| Delegates meaningful ownership with appropriate support.                 |      |      |                    |
| Gives timely, specific feedback and holds useful coaching conversations. |      |      |                    |
| Builds successors and prepares people for larger responsibility.         |      |      |                    |

## Team and culture leadership

| Observable behavior                                                  | Self | Boss | Evidence / example |
|----------------------------------------------------------------------|------|------|--------------------|
| Creates trust through consistency, fairness, and candor.             |      |      |                    |
| Encourages constructive disagreement and prevents avoidance.         |      |      |                    |
| Turns values into observable expectations and decisions.             |      |      |                    |
| Addresses behavior that harms the team, even from strong performers. |      |      |                    |

## Change, learning, and innovation

| Observable behavior                                               | Self | Boss | Evidence / example |
|-------------------------------------------------------------------|------|------|--------------------|
| Explains the need for change and the cost of standing still.      |      |      |                    |
| Involves affected people early enough to improve the plan.        |      |      |                    |
| Runs small, disciplined experiments and learns from results.      |      |      |                    |
| Helps people move through uncertainty while maintaining momentum. |      |      |                    |

## Enterprise leadership and peer collaboration

| Observable behavior                                                                                                | Self | Boss | Evidence / example |
|--------------------------------------------------------------------------------------------------------------------|------|------|--------------------|
| Acts in the interest of the whole company, even when the functional tradeoff is difficult.                         |      |      |                    |
| Builds trust with leadership peers through candor, reliability, and mutual support.                                |      |      |                    |
| Raises and resolves cross-functional tension directly rather than escalating, triangulating, or protecting a silo. |      |      |                    |
| Shares information, talent, resources, and credit when the enterprise need is greater.                             |      |      |                    |
| Leads or contributes meaningfully to organization-wide priorities outside the leader's functional area.            |      |      |                    |
| Influences across boundaries without relying only on positional authority.                                         |      |      |                    |

| Observable behavior                                                                          | Self | Boss | Evidence / example |
|----------------------------------------------------------------------------------------------|------|------|--------------------|
| Anticipates second-order effects and stakeholder reactions across the enterprise.            |      |      |                    |
| Challenges leadership-team decisions constructively and supports them responsibly once made. |      |      |                    |

## Interpretation and priority setting

- Do not treat the total score as the answer. A high average can hide one dangerous weakness.
- Identify the two highest-leverage gaps by asking: Which gap most limits results now? Which capability will the next role require?
- Look for differences of one point or more between the leader and others. Discuss the examples behind the ratings.
- Separate a skill gap from a will, values, role-clarity, capacity, or system problem. Development cannot repair a bad role or chronic overload.
- Choose no more than two development priorities for the next six to nine months.

## Organizational leadership bench assessment

| Observable behavior                                                      | Red / Yellow / Green | Evidence / example |
|--------------------------------------------------------------------------|----------------------|--------------------|
| Critical roles have clear success profiles.                              |                      |                    |
| Each critical role has at least one credible successor.                  |                      |                    |
| Managers are evaluated on developing people, not only personal output.   |                      |                    |
| High-potential designations are evidence-based and reviewed for bias.    |                      |                    |
| Development assignments are matched to specific capability gaps.         |                      |                    |
| Senior leaders regularly review talent and follow through on actions.    |                      |                    |
| Leadership promotions consider readiness, values, and people leadership. |                      |                    |

| Observable behavior                                                     | Red / Yellow / Green | Evidence / example |
|-------------------------------------------------------------------------|----------------------|--------------------|
| The organization can show that leadership development improved results. |                      |                    |

## Functional fluency self-check

Rate breadth separately from depth. A score of 3 means the leader can understand the core logic and measures, ask informed questions, and recognize when specialist help is needed. It does not mean the leader can personally run the function.

| Functional area                         | Current 1–5 | Role need 1–5 | Evidence / next experience |
|-----------------------------------------|-------------|---------------|----------------------------|
| Strategy and competitive position       |             |               |                            |
| Finance and value creation              |             |               |                            |
| Sales and revenue quality               |             |               |                            |
| Marketing and market insight            |             |               |                            |
| Operations and capacity                 |             |               |                            |
| Talent and organizational health        |             |               |                            |
| Customer experience and retention       |             |               |                            |
| Technology, data, AI, and cybersecurity |             |               |                            |
| Risk, legal, and governance             |             |               |                            |
| Enterprise integration and tradeoffs    |             |               |                            |

## Strategic thinking diagnostic

| Observable behavior                                                  | Self | Boss | Evidence / example |
|----------------------------------------------------------------------|------|------|--------------------|
| Frames the real problem before proposing a solution.                 |      |      |                    |
| Distinguishes symptoms, causes, constraints, and choices.            |      |      |                    |
| Connects external trends to business implications.                   |      |      |                    |
| Makes explicit choices about what the company will and will not do.  |      |      |                    |
| Uses scenarios and identifies assumptions that could fail.           |      |      |                    |
| Balances near-term execution with longer-term capability.            |      |      |                    |
| Anticipates second-order effects across functions.                   |      |      |                    |
| Converts strategy into coherent priorities, resources, and measures. |      |      |                    |

## PART III

# PERSONALITY AND LEADERSHIP PROFILING



### USE WHEN HELPFUL | Typical time: 10 minutes plus assessment time

Use this section when a profile or 360 review would add insight. You do not need a personality test to begin developing as a leader.

A personality profile can create a useful mirror, but it cannot tell the whole story. Personality describes tendencies; it does not measure character, skill, values in action, business judgment, or actual performance. The best use is development: helping a leader notice patterns, understand impact, and choose more effective behavior. Profiles should be interpreted with a qualified facilitator and combined with feedback and real performance evidence.

Personality has meaningful, but far from deterministic, relationships with leadership emergence and effectiveness. The Big Five provides the strongest general scientific foundation, while workplace tools can add useful language about motives and derailers. Because scores can be influenced by context, purpose, and response style, assessment data should be treated as one source among several (Judge et al., 2002; Morgeson et al., 2007; Wang et al., 2024).

## The best tools by purpose

| Tool                                           | Best use                                                   | Strength                                                                                                                        | Watch-out                                                                                     | Recommendation                                                                                |
|------------------------------------------------|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Hogan Leadership Forecast Series               | Deep leader development; strengths, derailers, and motives | Strong workplace orientation; HPI, HDS, and MVPI create a rounded picture. Especially useful for senior leaders and succession. | Requires certified interpretation; cost and depth can be excessive for broad entry-level use. | Top choice for senior-leader development and derailment risk.                                 |
| NEO-PI-3 or a high-quality Big Five instrument | Evidence-based personality baseline                        | Big Five is the strongest general personality framework and links meaningfully, though imperfectly, with leadership patterns.   | Traits are broad; results require translation into job-relevant behavior.                     | Best scientific foundation; use NEO for depth or IPIP-based measures for a lower-cost option. |

|                                        |                                             |                                                                                                                          |                                                                                                               |                                                                                |
|----------------------------------------|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| EQ-i 2.0 or ESCI                       | Emotional and social behavior               | Useful for self-awareness, emotional regulation, relationships, and coaching conversations. ESCI adds observer feedback. | "Emotional intelligence" measures vary; do not oversell prediction or treat scores as fixed ability.          | Use when emotional impact, relationships, or self-management are central gaps. |
| Leadership Circle Profile              | Leadership 360 and mindset patterns         | Combines observable leadership behavior with underlying reactive tendencies; useful for experienced leaders.             | More complex and expensive; facilitator quality matters.                                                      | Strong choice when a developmental 360 is the primary intervention.            |
| DiSC                                   | Communication and behavioral-style language | Easy to understand and useful for team conversations, conflict, and communication preferences.                           | Less suitable for predicting leadership potential or making selection decisions.                              | Use as a common language, not as a leadership verdict.                         |
| CliftonStrengths                       | Strengths awareness and role contribution   | Accessible, positive, and useful for discussing contribution and partnership.                                            | Measures talent themes rather than the full personality or capability picture; can underemphasize weaknesses. | Use to improve role fit and team contribution, alongside gap-based evidence.   |
| Predictive Index Behavioral Assessment | Workplace needs and behavioral drives       | Fast and practical for role/team discussions; supported by vendor validity research.                                     | Do not rely on it alone for selection, potential, or development priorities.                                  | Useful when the organization already uses PI and interprets it carefully.      |
| MBTI                                   | Reflection on preferences and team language | Memorable and widely recognized; can prompt useful conversation.                                                         | Type categories oversimplify continuous traits; limited value for prediction.                                 | Optional for conversation; not recommended as the core evidence-based tool.    |
| Enneagram                              | Personal reflection and narrative insight   | Can create engaging conversations about motives and habits.                                                              | Empirical support is limited and mixed; interpretations can become subjective or identity-based.              | Do not use as the primary organizational assessment.                           |

## Recommended assessment architecture

| Population                           | Core package                                                                                            | Optional add-on                                                         |
|--------------------------------------|---------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Emerging / front-line leader         | Capability self-assessment + boss assessment + DiSC or CliftonStrengths                                 | Short pulse feedback from direct reports.                               |
| Mid-level manager                    | Capability assessment + Big Five or Hogan + focused 360                                                 | Business-acumen assessment and cross-functional stakeholder interviews. |
| Senior leader / succession candidate | Hogan suite or NEO + robust 360 + business and role evidence                                            | Leadership Circle, executive coaching, and simulation or case exercise. |
| Leadership team                      | Individual data kept confidential; share team-level patterns, working agreements, and role implications | Team effectiveness survey and facilitated review.                       |

## Rules for responsible use

- Use profiles to open a conversation, not close a decision.
- Never tell someone “this is just who you are.” A tendency is not a destiny.
- Do not use a development instrument for hiring unless it has been validated for that exact purpose and role.
- Protect confidentiality. Agree in advance what the participant owns, what the organization receives, and what is shared.
- Require a debrief and a written bridge from insight to observable behavior.
- Revisit the profile only when it helps explain progress, pressure patterns, or a new role not as a permanent label.



## PART IV

# THE PROFESSIONAL DEVELOPMENT FRAMEWORK



### PUT IT TO WORK | Typical time: 15 minutes

Use this section to convert assessment results into a practical experience that unfolds through real work, feedback, coaching, and reflection.

The framework below is deliberately simple: Align, Diagnose, Focus, Practice, Reflect, Measure, and Sustain. It combines the strongest elements of formal learning, experience, feedback, coaching, and accountability. The proportions should vary by person and goal; the familiar 70-20-10 shorthand can be a planning prompt, but it should not be treated as a scientifically fixed formula.

Leadership training is more effective when it uses a sound needs analysis, multiple learning methods, practice, feedback, spaced delivery, and organizational support. Coaching also produces positive average effects, although results vary with the quality of the coach, participant readiness, and context (Jones et al., 2016; Lacerenza et al., 2017; Theeboom et al., 2014).

| Stage    | Key question                                                          | Required output                                    |
|----------|-----------------------------------------------------------------------|----------------------------------------------------|
| Align    | What business priorities and role demands should development support? | Two or three enterprise capability priorities.     |
| Diagnose | What evidence shows the leader's strengths, gaps, and risks?          | Assessment summary with examples.                  |
| Focus    | Which one or two capabilities would create the most leverage?         | Behaviorally specific development goals.           |
| Practice | What real work will require the new behavior?                         | Stretch assignment and practice plan.              |
| Reflect  | What happened, what did the leader learn, and what will change next?  | Short learning log and coaching conversation.      |
| Measure  | What do others observe, and what results moved?                       | Quarterly evidence review.                         |
| Sustain  | How will the new behavior become part of the operating system?        | Updated routines, role expectations, and next IDP. |

## The development mix

| Element         | Examples                                                                                                                  | Standard                                                                      |
|-----------------|---------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Experience      | Lead a strategic initiative, fix a broken process, manage a larger team, own a customer problem, integrate two functions. | Important, unfamiliar, bounded, supported, and tied to a specific capability. |
| Feedback        | Boss observations, stakeholder interviews, 360, project after-action review, team pulse.                                  | Specific, timely, behavioral, and followed by a next step.                    |
| Coaching        | Boss-as-coach, peer coaching, external coach, mentoring.                                                                  | Regular cadence, honest questions, documented commitments, and follow-up.     |
| Formal learning | Workshop, reading, case discussion, simulation, microlearning.                                                            | Delivered near the moment of use and converted into practice.                 |
| Reflection      | Journal, learning log, premortem, after-action review, quarterly review.                                                  | Brief, structured, and connected to the next decision.                        |

## A 12-month sample pathway

| Month | Activity                                                               | Evidence                                      |
|-------|------------------------------------------------------------------------|-----------------------------------------------|
| 0–1   | Align to strategy; baseline assessment; selected profile and/or 360.   | Baseline scores, examples, business measures. |
| 2     | Agree on one or two goals; choose stretch assignment; define measures. | Signed IDP and sponsor agreement.             |
| 3–4   | Learn and practice; biweekly boss check-ins; monthly peer session.     | Observation notes, decisions, early results.  |
| 5     | Midpoint pulse with 3–5 stakeholders.                                  | Stop/start/continue themes.                   |
| 6     | Quarterly review; adjust assignment, support, or measures.             | Updated IDP and scorecard.                    |
| 7–9   | Second practice cycle; teach or coach someone else.                    | Transfer evidence and team capability.        |
| 10    | Repeat focused feedback or selected 360 items.                         | Behavior change from baseline.                |
| 11    | Business impact and succession review.                                 | Results narrative and readiness view.         |
| 12    | Final review and next-cycle IDP.                                       | Sustainment plan and next assignment.         |

## PART V

# INDIVIDUAL DEVELOPMENT PLANNING



### START HERE | Typical time: 30 minutes

Every participating leader should use this section. Keep the plan to one or two priorities and update it as evidence changes.

## The IDP process

- 13 Start with the role and the business. Define what the leader must deliver now and what the next level will demand.
- 14 Gather evidence from the capability assessment, boss, stakeholders, performance results, and selected profiles.
- 15 Name the limiting pattern in plain language. Avoid vague goals such as “be more strategic” or “communicate better.”
- 16 Choose one or two observable behaviors that would demonstrate improvement.
- 17 Select a real assignment that creates repeated opportunities to practice.
- 18 Define support: boss, coach, mentor, peer, learning resource, and protected time.
- 19 Set leading and lagging measures, including what other people should notice.
- 20 Review progress monthly and formally each quarter. Change the plan when the evidence changes.

## A well-written goal

Weak: “Improve delegation.” Better: “By the end of Q2, transfer full ownership of the weekly operating review to two department managers. Each will own preparation, decision-making within agreed limits, and follow-up. I will stop answering questions they can answer, hold a 30-minute coaching review every other week, and use a direct-report pulse to check whether ownership and clarity improved.”

## Tool 1 – Individual Development Plan

Use one plan for a six-to-twelve-month development cycle. Keep it visible and discuss it as part of the normal operating rhythm.

### How to use it

- Complete the plan with the leader and the leader's boss.
- Limit the plan to one or two development priorities.
- Use observable evidence rather than private intention.
- Update the plan after each quarterly review.

| Field                                              | Your notes |
|----------------------------------------------------|------------|
| Business / role priority this development supports |            |
| Development goal stated as observable behavior     |            |
| Why this matters now / cost of no change           |            |
| Strengths to leverage                              |            |
| Likely obstacles, triggers, or derailers           |            |
| Stretch assignment / real-work practice            |            |
| Formal learning or reading                         |            |
| Boss / coach / mentor support                      |            |
| Leading indicators (monthly)                       |            |
| Outcome measures (quarterly)                       |            |
| Stakeholders who will give feedback                |            |
| 30-day actions                                     |            |
| 60-day actions                                     |            |
| 90-day actions                                     |            |
| Review dates and commitments                       |            |

## PART VI

# CEO AND BUSINESS-OWNER IMPLEMENTATION GUIDE



### CEO / OWNER PATH | Typical time: 25 minutes

Use this section when introducing the framework across an organization. Individual participants can skip it unless they help lead the rollout.

The CEO sets the seriousness of the effort. If leadership development is introduced as an HR program, delegated, and rarely discussed again, managers will read the signal correctly: the work is optional. If the CEO connects it to strategy, participates visibly, asks about progress, provides meaningful assignments, and holds senior leaders accountable for developing people, the program becomes part of how the company operates.



## Step-by-step rollout

01

### Define the business case

Name the two or three strategic priorities that require stronger leadership—for example, scaling through managers, improving execution, integrating functions, raising accountability, or building successors. Establish what better leadership should make possible.

02

### Set the leadership standard

Adopt or tailor the ten capabilities in this playbook. Define what each means at front-line, mid-level, and senior levels. Use the same language in hiring, promotion, performance, succession, and development.

03

### Choose the first cohort

Start with a manageable group whose roles matter and whose bosses will participate. Include leaders with real development opportunities, not only weak performers. Development should be an investment in performance and potential, not a disguised corrective-action program.

**04**

#### **Establish governance**

Name an executive sponsor, program owner, and each participant's accountable manager. Set dates for assessment, IDP approval, monthly reviews, quarterly talent reviews, and final evaluation before launch.

**05**

#### **Communicate directly**

Explain why the company is investing, what participation requires, what information will remain confidential, how assessments will be used, and how the program connects to performance and opportunity.

**06**

#### **Build the baseline**

Use the capability assessment, boss input, business measures, and selected profiles. Add 360 feedback for roles where stakeholder impact matters. Do not collect more data than the organization can discuss and act upon.

**07**

#### **Approve focused IDPs**

Require one or two goals, a real assignment, observable measures, and named support. The boss and participant should both sign the plan and protect time for the work.

**08**

#### **Run the cadence**

Use biweekly or monthly boss coaching, monthly cohort practice, quarterly evidence reviews, and periodic stakeholder pulses. Keep formal learning short and close to application.

**09**

#### **Remove system barriers**

If priorities conflict, decision rights are unclear, meetings consume the week, or the role is overloaded, fix the system. Do not call an organizational design problem a personal development problem.

**10**

#### **Evaluate and decide**

At six and twelve months, review behavior, team health, execution, and business results. Continue, adjust, promote, reassign, or address performance based on evidence—not program completion.

## CEO launch message – talking points

- Why now: identify the business challenge and the leadership capability it requires.
- What we believe: people can grow, but growth requires honest feedback, practice, and accountability.
- What this is: a business initiative that helps leaders deliver results through others.
- What this is not: a personality contest, a remedial class, or a promise of promotion.
- What leaders can expect: assessment, useful support, real assignments, and direct feedback.
- What the company expects: ownership, openness, practice, application, and measurable progress.
- What senior leaders will do: model the process, coach their people, remove barriers, and review evidence.

## Implementation roles

| Role                | Accountability                                                                                                                      |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| CEO / owner         | Connect the effort to strategy; model participation; review progress quarterly; hold executives accountable for developing leaders. |
| Executive sponsor   | Resolve barriers; protect standards and cadence; communicate progress.                                                              |
| Program owner / HR  | Coordinate assessments and sessions; maintain the scorecard; protect confidentiality; support managers.                             |
| Leader's boss       | Co-create the IDP; provide assignments; observe behavior; coach monthly; document evidence.                                         |
| Participant         | Own the plan; practice; seek feedback; maintain evidence; raise obstacles early.                                                    |
| Coach / facilitator | Interpret data; challenge thinking; teach tools; support transfer; avoid creating dependency.                                       |

## Governance questions for the CEO and leadership team

- ◆ Which strategic capabilities are we trying to build, and why do they matter now?
- ◆ Are we developing leaders for the business we have or the business we are becoming?
- ◆ What will leaders be authorized to do differently as their capability grows?
- ◆ Which assignments offer the best development value without creating unacceptable business risk?
- ◆ How will we distinguish a capability gap from a role, capacity, incentive, or organizational-design problem?
- ◆ What assessment information is private, what is shared, and who is permitted to see it?
- ◆ How will we test for favoritism, similarity bias, and unequal access to visible assignments?
- ◆ What evidence will change a promotion, succession, investment, or performance decision?
- ◆ What will we stop doing so that leaders have room to practice and reflect?
- ◆ How will we know this system is strengthening the leadership bench rather than simply producing activity?



## 90-day implementation checklist

| Timing     | CEO / owner action                                                             | Completion evidence                                               |
|------------|--------------------------------------------------------------------------------|-------------------------------------------------------------------|
| Days 1–15  | Agree on business case, capabilities, sponsor, cohort, governance, and budget. | One-page charter approved.                                        |
| Days 16–30 | Communicate the effort; prepare managers; schedule the full cadence.           | Launch message, calendar, and manager briefing complete.          |
| Days 31–50 | Complete baseline assessments and debriefs.                                    | Assessment summaries and baseline measures.                       |
| Days 51–65 | Approve IDPs and stretch assignments.                                          | Every participant has a signed, focused plan.                     |
| Days 66–90 | Begin practice, coaching, peer sessions, and dashboard reporting.              | First evidence review completed; barriers assigned and addressed. |

## Implementation failure modes

| Failure                           | Early warning sign                                                                 | Correction                                                                |
|-----------------------------------|------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| Executive sponsorship is symbolic | CEO launches the program but never asks about it again.                            | Put quarterly reviews on the operating calendar and require evidence.     |
| Too many goals                    | IDPs contain five to ten broad competencies.                                       | Choose one or two behaviors that create the most leverage.                |
| Learning is separated from work   | Participants attend sessions but have no practice assignment.                      | Attach every module to a live deliverable or leadership challenge.        |
| Bosses are not involved           | Participants cannot describe what their boss expects to see change.                | Train bosses first and make coaching a manager accountability.            |
| Assessment becomes labeling       | People refer to colleagues by a type or color.                                     | Return to behaviors, context, and choices; prohibit selection shortcuts.  |
| No measurement                    | Success is reported as attendance and satisfaction.                                | Use the four-level scorecard and baseline comparisons.                    |
| The system blocks the behavior    | The leader is asked to delegate but retains every decision and an overloaded span. | Clarify authority, capacity, priorities, and role design.                 |
| Candor disappears                 | Weak performance is discussed as a development need indefinitely.                  | Separate development from formal performance management and act promptly. |

## PART VII

# MEASUREMENT AND PROGRESS



### PUT IT TO WORK | Typical time: 15 minutes each quarter

Use only the measures connected to the leader's goals and assignment. The objective is credible evidence, not a complicated reporting system.

Measurement should answer four questions: Did the leader engage in the process? Did behavior change? Did the team or operating system improve? Did the change matter to the business? No single number can answer all four. Use a small balanced scorecard and compare against a baseline.

This is a contribution model, not a claim of laboratory causation. Leadership development takes place in an open business system where markets, staffing, investment, technology, and luck also affect outcomes. The right question is whether the evidence forms a credible chain from changed leadership behavior to improved team or operating conditions and then to a material business result.

## The four-level leadership development scorecard

| Level                            | Question                                                     | Example measures                                                                                                     | Cadence            |
|----------------------------------|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|--------------------|
| 1. Participation and application | Is the leader doing the work?                                | IDP milestones; coaching cadence; practice repetitions; stretch assignment progress.                                 | Monthly            |
| 2. Behavior change               | Are other people seeing different leadership?                | Focused 360 items; boss observation; stakeholder pulse; quality of meetings, delegation, feedback, or decisions.     | Quarterly          |
| 3. Team and operating impact     | Is the local system healthier and more effective?            | Engagement pulse; regrettable turnover; internal promotions; decision speed; accountability; project predictability. | Quarterly          |
| 4. Business impact               | Did the leadership change contribute to an important result? | Revenue, margin, quality, customer retention, safety, cycle time, on-time delivery, strategic milestones.            | Quarterly / annual |

## Measurement rules

- ◆ Baseline before intervention. If there is no starting point, improvement becomes opinion.
- ◆ Use a comparison where practical: prior period, another team, project forecast, or expected trend.
- ◆ Track contribution, not false certainty. Leadership development is usually one of several causes of business movement.
- ◆ Use a few leading indicators and a few outcomes. Too many measures hide the story.
- ◆ Ask for examples. A score without observable evidence is weak data.
- ◆ Do not publish individual personality scores or confidential coaching content. Report development progress and agreed business evidence.

## Credible impact review

| Question                                                                      | Notes |
|-------------------------------------------------------------------------------|-------|
| What changed in the leader's observable behavior?                             |       |
| Who noticed, and what examples support the conclusion?                        |       |
| What changed in the team, process, decision, or stakeholder relationship?     |       |
| Which business measure moved, and compared with what baseline?                |       |
| What other explanations could account for the result?                         |       |
| What evidence suggests leadership development made a meaningful contribution? |       |
| What did not improve, and what does that teach us?                            |       |
| What should be sustained, scaled, redesigned, or stopped?                     |       |

## Tool 2 – Quarterly Progress Review

Use this 45-minute review among the participant, boss, and—when useful—the coach or program owner.

### How to use it

- ◆ Review evidence before discussing impressions.
- ◆ Ask what others are noticing, not only how the participant feels.
- ◆ Name obstacles and decide whether they are personal, relational, role-based, or systemic.
- ◆ End with no more than three commitments for the next quarter.

| Field                                | Your notes |
|--------------------------------------|------------|
| Development goal                     |            |
| Behavior we expected to see          |            |
| Evidence observed this quarter       |            |
| Feedback from boss / peers / team    |            |
| Stretch assignment progress          |            |
| Business or team measures            |            |
| What helped                          |            |
| What got in the way                  |            |
| What to stop / start / continue      |            |
| Next-quarter commitments             |            |
| Support or system changes required   |            |
| Overall status: red / yellow / green |            |

## Tool 3 – Stakeholder Pulse

Use a five-minute pulse with three to six people who regularly experience the target behavior.

### How to use it

- ◆ Ask the same questions at baseline, midpoint, and endpoint.
- ◆ Collect examples and themes; do not create false precision from a tiny sample.
- ◆ Share results in a facilitated conversation.

| Field                                                             | Your notes |
|-------------------------------------------------------------------|------------|
| What positive change have you noticed?                            |            |
| Where is the old pattern still visible?                           |            |
| What is one behavior that would make the biggest difference next? |            |
| Example or evidence                                               |            |
| Confidence that change will be sustained (1–5)                    |            |



## PART VIII

# FIELD TOOLS FOR THE LEADERSHIP JOURNEY



### USE WHEN NEEDED | Typical time: 5–20 minutes per tool

This is a tool library, not a checklist. Choose the tool that fits the leadership situation in front of you.

The tools are designed to improve real leadership moments. They are not paperwork to complete for its own sake. A useful tool should help the leader think more clearly, prepare for a better conversation, make ownership visible, or learn from experience. Once the tool has served that purpose, return to the work.

## Choosing the right tool

| Tool                         | Use it when...                                                                                                | A good result looks like...                                                                              |
|------------------------------|---------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Individual Development Plan  | A leader has identified one or two priorities and needs a practical growth plan.                              | The goal is tied to the business, practiced through real work, and supported by clear evidence.          |
| Quarterly Progress Review    | The participant and boss need to look honestly at progress and adjust the plan.                               | They leave with a shared view of evidence, obstacles, support, and next commitments.                     |
| Stakeholder Pulse            | Other people regularly experience the behavior the leader is trying to change.                                | The leader hears specific themes and examples without turning a small sample into false precision.       |
| Leadership One-on-One Agenda | A manager and direct report need a dependable conversation about priorities, obstacles, feedback, and growth. | The meeting produces clarity, decisions, ownership, and stronger communication—not just a status report. |
| Delegation Contract          | A meaningful result is being transferred to another person.                                                   | Both people understand the outcome, authority, boundaries, support, and review points.                   |
| Coaching Conversation        | A leader is tempted to solve another person's problem or give advice too quickly.                             | The other person thinks more clearly, recommends a path, and owns the next step.                         |

|                                                      |                                                                                               |                                                                                                              |
|------------------------------------------------------|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Feedback Planner                                     | A behavior should be reinforced or redirected while the situation is still fresh.             | The conversation is specific, respectful, two-way, and followed by a clear next behavior.                    |
| Difficult Conversation Planner                       | Delay, avoidance, or accumulated frustration is increasing the cost of an unresolved issue.   | The leader enters with facts, listens well, states the standard, and agrees on a direct next step.           |
| Decision Quality Checklist                           | A decision is consequential, uncertain, cross-functional, or receiving agreement too easily.  | The real decision, tradeoffs, assumptions, risks, owner, and review trigger are explicit.                    |
| Stretch Assignment Charter                           | Important work can also be used to build a specific leadership capability.                    | The assignment is challenging but supported, and both business success and leadership growth are measurable. |
| After-Action Review                                  | A milestone, project, decision, success, or failure contains lessons worth capturing.         | The team separates facts from blame and turns learning into a concrete change.                               |
| Monthly Learning Log                                 | Experience is moving quickly and the leader needs to notice patterns rather than repeat them. | One specific event produces a useful insight, feedback request, or behavior experiment.                      |
| Talent Review Card                                   | Leaders are discussing performance, potential, readiness, succession, or next assignments.    | Judgments are evidence-based, bias is tested, and development actions have owners and dates.                 |
| Enterprise Initiative and Peer Collaboration Charter | A project spans functions and requires peers to share authority, resources, and tradeoffs.    | The enterprise outcome, working agreements, decision rights, tensions, and shared measures are clear.        |
| AI Leadership Use-Case and Decision Canvas           | A leader sees a possible AI opportunity and needs to test value, risk, and human ownership.   | A bounded pilot has a baseline, guardrails, review method, measures, and stop-or-scale criteria.             |

## How to get value from any tool

- ◆ Use the tool before the leadership moment, not only afterward.
- ◆ Write briefly. A few honest sentences are more useful than a polished form full of vague language.
- ◆ Complete it with the people who share ownership whenever possible.
- ◆ End with a decision, behavior, owner, and date.
- ◆ Return later to ask what changed and what was learned.

## Tool 4 – Leadership One-on-One Agenda

Use this agenda for a 45–60 minute conversation. The direct report should help set the agenda and leave owning the commitments.

### How to use it

- ◆ Hold the meeting on a dependable cadence.
- ◆ Discuss outcomes and decisions before activity.
- ◆ Include development regularly, not only when something is wrong.

| Field                        | Your notes |
|------------------------------|------------|
| Wins and progress            |            |
| Top priorities and measures  |            |
| Obstacles / decisions needed |            |
| People and team issues       |            |
| Feedback in both directions  |            |
| Development / career         |            |
| Commitments: owner and date  |            |

## Tool 5 – Delegation Contract

Use before transferring meaningful ownership. Match checkpoints to the risk and the person's readiness.

### How to use it

- ◆ Describe the result and why it matters.
- ◆ Clarify boundaries and decision rights.
- ◆ Ask the person to play back the assignment in their own words.
- ◆ Review without taking the work back.

| Field                                   | Your notes |
|-----------------------------------------|------------|
| Outcome / definition of done            |            |
| Why it matters                          |            |
| Owner                                   |            |
| Authority: decide / recommend / execute |            |
| Boundaries and non-negotiables          |            |
| Resources and stakeholders              |            |
| Risks to watch                          |            |
| Checkpoints                             |            |
| Escalation triggers                     |            |
| Learning goal                           |            |

## Tool 6 – Coaching Conversation

A short structure for helping another leader think rather than creating dependence.

### How to use it

- Ask before advising.
- Stay with the real issue long enough to diagnose it.
- Require the person to recommend a next step.

| Field                            | Your notes |
|----------------------------------|------------|
| What is happening?               |            |
| What outcome matters most?       |            |
| What is the real obstacle?       |            |
| What assumptions are you making? |            |
| What have you tried and learned? |            |
| What options do you see?         |            |
| What do you recommend?           |            |

|                            |  |
|----------------------------|--|
| What will you do, by when? |  |
| What support do you need?  |  |

## Tool 7 – Feedback Planner

Use for timely reinforcing or redirecting feedback. Prepare facts and the standard; remain open to context you do not know.

### How to use it

- Describe behavior, not personality.
- Explain impact without exaggeration.
- Listen, agree on the next behavior, and follow up.

| Field                             | Your notes |
|-----------------------------------|------------|
| Situation / context               |            |
| Observable behavior               |            |
| Impact on result, person, or team |            |
| Expected standard                 |            |
| Question to invite their view     |            |
| Agreed next behavior              |            |
| Follow-up date                    |            |

## Tool 8 – Difficult Conversation Planner

Use when avoidance is increasing cost, risk, or resentment.

### How to use it

- Separate facts from the story you are telling yourself.
- Decide the required outcome and where you can be flexible.
- Be direct, respectful, and prepared to listen.

| Field                              | Your notes |
|------------------------------------|------------|
| Issue stated in one sentence       |            |
| Facts / examples                   |            |
| Business or team impact            |            |
| Relevant expectation or commitment |            |
| My contribution to the issue       |            |
| Their likely perspective           |            |
| Opening language                   |            |
| Questions to ask                   |            |
| Required next step                 |            |
| Consequence if unresolved          |            |
| Follow-up                          |            |

## Tool 9 – Decision Quality Checklist

Use for consequential decisions, especially when the team agrees too quickly.

### How to use it

- ◆ Write the decision before debating solutions.
- ◆ Invite one person to make the best case against the preferred option.
- ◆ Record assumptions and a review trigger.

| Field                       | Your notes |
|-----------------------------|------------|
| Decision and decision owner |            |
| Deadline                    |            |
| Desired outcome             |            |
| Options considered          |            |
| Criteria and tradeoffs      |            |
| Critical facts              |            |

|                                      |  |
|--------------------------------------|--|
| Assumptions                          |  |
| Disconfirming evidence               |  |
| Affected stakeholders                |  |
| Risks / second-order effects         |  |
| Reversibility                        |  |
| Decision, rationale, and review date |  |

## Tool 10 – Stretch Assignment Charter

Use to turn a business priority into a deliberate development experience.

### How to use it

- ◆ Select an assignment that matters and contains a real stretch.
- ◆ Name the capability being developed.
- ◆ Provide support without removing ownership.

| Field                         | Your notes |
|-------------------------------|------------|
| Business outcome              |            |
| Development capability        |            |
| Why this is a stretch         |            |
| Scope and authority           |            |
| Sponsor                       |            |
| Key stakeholders              |            |
| Milestones                    |            |
| Risks and guardrails          |            |
| Coaching cadence              |            |
| Evidence of business success  |            |
| Evidence of leadership growth |            |
| After-action review date      |            |

## Tool 11 – After-Action Review

Use immediately after milestones, decisions, meetings, projects, or failures.

### How to use it

- Keep the conversation factual and blame-free.
- Translate learning into a system or behavior change.

| Field                            | Your notes |
|----------------------------------|------------|
| What did we intend to happen?    |            |
| What actually happened?          |            |
| What explains the difference?    |            |
| What should we repeat?           |            |
| What should we change?           |            |
| Who owns the change and by when? |            |

## Tool 12 – Monthly Learning Log

A ten-minute reflection that keeps experience from passing without learning.

### How to use it

- Complete before the monthly coaching conversation.
- Use one concrete incident rather than general impressions.

| Field                            | Your notes |
|----------------------------------|------------|
| Leadership moment / situation    |            |
| What I did                       |            |
| What happened                    |            |
| What I was thinking or feeling   |            |
| What others may have experienced |            |
| What I learned                   |            |

|                      |  |
|----------------------|--|
| What I will try next |  |
| Feedback I need      |  |

## Tool 13 – Talent Review Card

Use in quarterly talent reviews to separate performance, potential, readiness, and development.

### How to use it

- ◆ Require evidence and test for bias.
- ◆ Do not equate confidence, similarity, or visibility with potential.
- ◆ Name the next assignment rather than using vague “more exposure” language.

| Field                            | Your notes |
|----------------------------------|------------|
| Role and business impact         |            |
| Performance evidence             |            |
| Leadership strengths             |            |
| Development gaps / derailers     |            |
| Values and behavior evidence     |            |
| Potential: basis and uncertainty |            |
| Readiness for next role          |            |
| Successor status                 |            |
| Next assignment                  |            |
| Retention risk                   |            |
| Owner and review date            |            |

## Tool 14 – Enterprise Initiative and Peer Collaboration Charter

Use when a leader is asked to lead or co-lead work that spans functions. The charter makes the enterprise outcome, shared ownership, decision rights, and collaboration standard explicit.

## How to use it

- ◆ Select an initiative whose success requires real cooperation across functions.
- ◆ Name both the business outcome and the peer-leadership behaviors being developed.
- ◆ Agree on decision rights and escalation before conflict occurs.
- ◆ Review team health as well as project milestones.
- ◆ Close with an after-action review that includes every participating function.

| Field                                   | Your notes |
|-----------------------------------------|------------|
| Enterprise problem or opportunity       |            |
| Why it matters to the whole company     |            |
| Executive sponsor                       |            |
| Project leader / co-leaders             |            |
| Functions and leadership peers involved |            |
| Shared outcome and success measures     |            |
| Local tradeoffs we may need to accept   |            |
| Decision rights                         |            |
| Resources and capacity commitments      |            |
| Peer working agreements                 |            |
| Information-sharing rhythm              |            |
| Known tensions or competing incentives  |            |
| Escalation path                         |            |
| 30 / 60 / 90-day milestones             |            |
| Peer feedback questions                 |            |
| Business-result review date             |            |
| Collaboration after-action review       |            |

## Tool 15 – AI Leadership Use-Case and Decision Canvas

Use before adopting AI for a team or workflow. Complete it with the people who do the work and the experts responsible for data, security, privacy, legal, or people risk.

### How to use it

- ◆ Start with the business problem and the current baseline, not the product.
- ◆ Keep the first test small, reversible, and easy to observe.
- ◆ Name the human decision owner and verification method before the pilot.
- ◆ Count review, correction, training, and change-management time in the economics.
- ◆ Stop, revise, or scale based on evidence rather than enthusiasm.

| Field                                                                 | Your notes |
|-----------------------------------------------------------------------|------------|
| Business problem / desired outcome                                    |            |
| Who experiences the problem                                           |            |
| Current workflow and baseline                                         |            |
| Proposed role for AI                                                  |            |
| Tasks AI must not perform                                             |            |
| Human owner and required review point                                 |            |
| Approved information and data classification                          |            |
| Privacy, security, legal, intellectual-property, and people risks     |            |
| How outputs will be verified                                          |            |
| People affected and how they will be involved                         |            |
| Pilot scope, owner, and dates                                         |            |
| Measures: time, quality, revenue, cost, capacity, experience, or risk |            |
| Full costs and assumptions                                            |            |
| Conditions that require us to stop                                    |            |
| Evidence required to scale                                            |            |
| Decision: stop / revise / scale                                       |            |
| Lessons and next review date                                          |            |

## PART IX

# THE LEADERSHIP CURRICULUM



### FACILITATOR / ORGANIZATION PATH | Typical time: Program planning

Use this section to build a shared development experience. Individual leaders do not need to complete the full curriculum to use the playbook.

A common curriculum creates shared language, while the IDP and assignments create individual depth. Run the modules over six to nine months, with application between sessions. Each module should end with a real-work commitment that the participant's boss reviews.

| Module                                           | Core skills                                                                                                                     | Required application                                                                |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 1. Leading self                                  | Self-awareness, character, emotional regulation, energy, learning agility.                                                      | Profile debrief and one behavior experiment.                                        |
| 2. Role transition                               | Leading through others, managerial leverage, priorities, time horizon.                                                          | Stop-doing list and role reset with boss.                                           |
| 3. Clarity and accountability                    | Outcomes, standards, decision rights, operating rhythm.                                                                         | Reset one team priority and accountability review.                                  |
| 4. Delegation and coaching                       | Readiness, authority, questions, feedback, follow-up.                                                                           | Delegate one consequential outcome using the contract.                              |
| 5. Communication and conflict                    | Listening, candor, influence, difficult conversations.                                                                          | Conduct and reflect on one avoided conversation.                                    |
| 6. Strategy and business acumen                  | Business model, financial drivers, customers, choices, scenarios.                                                               | Present a decision using business and financial logic.                              |
| 7. Team and culture                              | Trust, conflict, norms, values, talent, psychological safety.                                                                   | Establish or repair one team working agreement.                                     |
| 8. Change and execution                          | Change case, stakeholder map, experiments, adoption, measures.                                                                  | Lead a bounded change and run an after-action review.                               |
| 9. Leading with AI                               | AI literacy, problem selection, critical review, data judgment, workflow redesign, responsible adoption, and value measurement. | Run one low-risk pilot using Tool 15 and present a stop, revise, or scale decision. |
| 10. Enterprise leadership and peer collaboration | Cross-functional influence, peer trust, shared resources, enterprise tradeoffs, systems, and stakeholders.                      | Lead or co-lead an organization-wide initiative with leadership peers.              |
| 11. Integration                                  | Evidence, lessons, succession, sustainment.                                                                                     | Present a leadership impact case and next IDP.                                      |

## PART X

# TOP RESOURCES AND READING



### GO DEEPER | Typical time: At your discretion

Choose resources connected to your current development priority. The reading list is not an assignment to complete all at once.

## The top 10 books every leader should read

| Book                                                                     | Why it belongs                                                                                      |
|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| 1. The Effective Executive — Peter F. Drucker                            | The enduring foundation for contribution, priorities, time, decisions, and effectiveness.           |
| 2. The Leadership Pipeline — Ram Charan, Stephen Drotter, and James Noel | Explains how work, time, and values must change as leaders move through levels.                     |
| 3. The Effective Manager — Mark Horstman                                 | A practical system for one-on-ones, feedback, coaching, and delegation.                             |
| 4. The Coaching Habit — Michael Bungay Stanier                           | Builds the discipline of asking useful questions before giving answers.                             |
| 5. Radical Candor — Kim Scott                                            | Offers a memorable approach to combining personal care with direct challenge.                       |
| 6. The Five Dysfunctions of a Team — Patrick Lencioni                    | Makes trust, conflict, commitment, accountability, and results easy to discuss.                     |
| 7. Thinking in Bets — Annie Duke                                         | Improves decision-making under uncertainty and separates process quality from outcome luck.         |
| 8. Good Strategy/Bad Strategy — Richard Rumelt                           | Clarifies diagnosis, guiding policy, and coherent action—and exposes strategic fluff.               |
| 9. Turn the Ship Around! — L. David Marquet                              | Shows how leaders build ownership, competence, and intent rather than dependence.                   |
| 10. The Fearless Organization — Amy C. Edmondson                         | Explains psychological safety and how leaders create candor, learning, and intelligent risk-taking. |

## Additional high-value resources

| Need                       | Resource                                                                                                                                                   |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New managers               | Julie Zhuo, <i>The Making of a Manager</i> ; Don and Sheryl Grimme, <i>The New Manager's Tool Kit</i> .                                                    |
| Senior leadership          | Ronald Heifetz, Alexander Grashow, and Marty Linsky, <i>The Practice of Adaptive Leadership</i> ; Robert Kegan and Lisa Lahey, <i>Immunity to Change</i> . |
| Execution                  | Chris McChesney, Sean Covey, and Jim Huling, <i>The 4 Disciplines of Execution</i> ; Gino Wickman and René Boer, <i>How to Be a Great Boss</i> .           |
| Feedback and conversations | Douglas Stone and Sheila Heen, <i>Thanks for the Feedback</i> ; Kerry Patterson et al., <i>Crucial Conversations</i> .                                     |
| Teams                      | J. Richard Hackman, <i>Leading Teams</i> ; Amy Edmondson, <i>Right Kind of Wrong</i> .                                                                     |
| Strategy and systems       | Roger Martin, <i>Playing to Win</i> ; Donella Meadows, <i>Thinking in Systems</i> .                                                                        |
| Change                     | John Kotter, <i>Leading Change</i> ; William Bridges, <i>Managing Transitions</i> .                                                                        |
| Business acumen            | Karen Berman and Joe Knight, <i>Financial Intelligence</i> ; Robert Kaplan and David Norton, <i>The Balanced Scorecard</i> .                               |
| Coaching                   | John Whitmore, <i>Coaching for Performance</i> ; Edgar Schein and Peter Schein, <i>Humble Inquiry</i> .                                                    |
| Character and judgment     | Ed Robinson, <i>Reflections on Life and Leading</i> ; Warren Bennis, <i>On Becoming a Leader</i> .                                                         |

## Useful organizations and tools

- ◆ Center for Creative Leadership: research, 360 tools, and leader-development resources.
- ◆ Society for Industrial and Organizational Psychology: guidance on workplace assessment and evidence.
- ◆ CIPD: evidence reviews and practical learning-and-development guidance. Harvard Business Review and MIT Sloan Management Review: accessible management research and cases.
- ◆ Gallup Workplace: manager and engagement research; use claims with attention to method and context.
- ◆ International Personality Item Pool: public-domain Big Five items, scales, scoring, and technical information.

- ◆ Hogan Assessments, The Leadership Circle, Multi-Health Systems, and Korn Ferry: professional tools requiring qualified use.
- ◆ Vistage resources: peer learning, speaker content, coaching tools, and leadership assessments.

## PLAIN-LANGUAGE GUIDE TO COMMON TERMS

Leadership-development language can become more complicated than the work itself. The playbook occasionally uses the terms below because they are common in research and professional practice. Here is what they mean in everyday business language.



### Rating scale

| Term                    | Plain-language meaning                                                                                     |
|-------------------------|------------------------------------------------------------------------------------------------------------|
| Enterprise leadership   | Leading for the good of the whole company, not only your own department.                                   |
| Functional fluency      | Knowing enough about each part of the business to ask good questions and make connected decisions.         |
| Second-order effects    | What else might happen because of this decision?                                                           |
| Observable behavior     | What other people should actually see you doing differently.                                               |
| Development experience  | A real assignment that helps you practice and grow.                                                        |
| Stretch assignment      | Important work that is somewhat beyond what you have already mastered.                                     |
| Assessment architecture | The combination of assessments, feedback, and performance evidence used to understand development needs.   |
| Derailer                | A behavior that may become a problem, especially when the leader is under pressure.                        |
| Psychological safety    | A team climate in which people can speak honestly, ask for help, question assumptions, and admit mistakes. |
| Learning transfer       | Using what was learned in actual work rather than leaving it in the classroom.                             |

|                       |                                                                                                            |
|-----------------------|------------------------------------------------------------------------------------------------------------|
| Leading indicator     | An early sign that progress is moving in the right direction.                                              |
| Business contribution | The credible way improved leadership helped an important result, without pretending it was the only cause. |
| Theory of change      | A clear explanation of how the development activity is expected to produce better behavior and results.    |

## BIBLIOGRAPHY AND EVIDENCE BASE

### REFERENCE | Typical time: Use as needed

This section documents the research and intellectual sources supporting the playbook. Most managers do not need to read it in order to use the framework.



The references below include foundational research, meta-analyses, evidence reviews, and practical works. In-text citations use an author–date format, and the bibliography follows APA 7th-edition conventions as closely as the available publication information permits. Vendor documentation is useful for understanding an instrument, but independent evidence should carry more weight when comparing claims.

### Original frameworks and tools by Edward Robinson

The following frameworks, assessments, processes, and field tools were developed by Edward Robinson through Capacity Building Solutions, Inc. They reflect his executive-coaching methodology, management-development work, Vistage Chair experience, and long-term work with CEOs, business owners, and leadership teams. They should be credited to Edward Robinson and Capacity Building Solutions, Inc. when reproduced or adapted.

| Robinson framework or tool                      | Purpose                                                                                                                                                                        |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Leadership Development Best-Practices Framework | The integrated ten-capability model spanning leading self, leading others, business and functional fluency, strategic thinking, peer collaboration, and enterprise leadership. |
| Leadership Growth Chain                         | The six-link theory of change connecting business need, role demand, observable leadership behavior, development experience, team or system change, and business contribution. |

| Robinson framework or tool                                                  | Purpose                                                                                                                                                                                 |
|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Leadership Capability Assessment                                            | The self, boss, and multi-rater assessment covering the ten broad leadership capabilities.                                                                                              |
| Functional Fluency Self-Check                                               | The cross-functional assessment covering strategy, finance, sales, marketing, operations, people, customer experience, technology/data/AI, risk/governance, and enterprise integration. |
| Strategic Thinking Diagnostic                                               | The assessment of problem framing, external perspective, tradeoffs, scenarios, second-order effects, and strategy execution.                                                            |
| Organizational Leadership Bench Assessment                                  | The red-yellow-green review of critical roles, successors, development assignments, promotion standards, talent reviews, and measurable bench strength.                                 |
| Leadership Assessment Architecture and Profiling Decision Guide             | The practical process for combining capability evidence, personality, emotional intelligence, derailers, 360 feedback, and performance data without labeling the leader.                |
| Align–Diagnose–Focus–Practice–Reflect–Measure–Sustain Development Framework | The seven-stage professional-development process that connects development to strategy and real work.                                                                                   |
| Individual Development Plan Process and Template                            | The focused six-to-twelve-month IDP process built around one or two behaviors, stretch experience, support, and measurable evidence.                                                    |
| CEO and Business-Owner Implementation Framework                             | The organizational rollout process, governance model, 90-day implementation checklist, and failure-mode review.                                                                         |
| Leading With Artificial Intelligence Framework                              | The plain-language Use–Judge–Protect–Redesign–Lead model, AI readiness check, 30-day development path, guardrails, and value-measurement guidance.                                      |
| Four-Level Leadership Development Scorecard                                 | The measurement system covering participation/application, behavior change, team and operating impact, and business contribution.                                                       |
| Leadership Development Field Toolset                                        | The fifteen interactive tools, including the AI Leadership Use-Case and Decision Canvas, for translating leadership insight into real-work action.                                      |



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# FINAL LEADERSHIP DEVELOPMENT COMMITMENTS



A development system only matters when it changes what leaders do. Use this final page at launch and at the end of each annual cycle. The questions are intentionally direct.

| Commitment                                                       | Response |
|------------------------------------------------------------------|----------|
| The business result stronger leadership must enable              |          |
| The two leadership capabilities our organization must strengthen |          |
| The one behavior I personally will model                         |          |
| The leaders in the first cohort                                  |          |
| The executive sponsor and program owner                          |          |
| The date baseline assessment will be complete                    |          |
| The date every IDP will be approved                              |          |
| The monthly coaching cadence                                     |          |
| The quarterly measurement dates                                  |          |
| The first business assignment each participant will use          |          |
| The system barrier we must remove                                |          |
| What we will do if behavior or performance does not improve      |          |

The standard is not participation. The standard is visible growth that improves the work, strengthens the team, and produces better results.