

Leadership & Team Performance — Workbook

This workbook turns the course into a working operating system for leading your real team. Move through it in order: map your style and diagnose each person, draft and rehearse the feedback and hard conversations you are avoiding, redesign your meeting calendar and one-on-ones, then set OKRs and run a fair performance and trust system. The templates at the end give you the one-on-one agenda, OKR tracker, feedback prep sheet, and a meeting cost calculator you can reuse every week. By the last page you should be leading on purpose rather than reacting.

Leadership Foundations and Adapting Your Style

Diagnose your default style, find the traps holding you back, and learn to flex your approach to each person and task.

Exercise: Audit Your Shift from Doer to Leader

Reflect honestly on how you actually spend your time and which new-manager trap has the strongest pull on you. Use last week as your evidence, not how you wish you worked.

- Estimate what percent of last week you spent doing the work versus leading the work (coaching, deciding, unblocking, planning).

- Which trap is strongest for you right now: the doer, the buddy, the hero, or the clone? Give one concrete example from the past month.

- Name one task you are still doing yourself that someone on your team could own, and what is really stopping you from handing it over.

- Write your new definition of a good leadership day in one sentence.

Worksheet: Diagnose Each Person with Situational Leadership

For each team member, pick one specific current task and rate their competence and commitment to place them at D1 to D4, then name the matching style. Transfer this into the Situational Leadership Diagnosis template so you can track it over time.

Team member name

Specific task being assessed

Competence for this task (low / moderate / high)

Commitment for this task (low / variable / high)

Development level (D1 enthusiastic beginner / D2 disillusioned learner / D3 capable but cautious / D4 self-reliant achiever)

Matching style to use (S1 Directing / S2 Coaching / S3 Supporting / S4 Delegating)

One change you will make in how you lead them on this task

Checklist: Style-Flex Readiness Check

- Named my default leadership style honestly
- Identified the one or two styles I avoid (often coaching or democratic)
- Diagnosed development level by task, not just by person, for at least three people
- Spotted at least one person I am over-delegating to before they are ready
- Spotted at least one D4 I may be micromanaging and chosen to back off
- Chosen one low-stakes moment this week to practice a style I usually skip

Communication, Feedback, and Difficult Conversations

Convert vague reactions into SBI feedback, set unambiguous expectations, and prepare the hard conversation you have been postponing.

Worksheet: Build Three Pieces of SBI Feedback

Draft three real pieces of feedback you owe someone, at least one positive and one corrective, using Situation, Behavior, and Impact. Keep Behavior to only what a camera could have recorded. Use the Feedback Prep Sheet template to refine and schedule them.

Person and whether this is reinforcing or corrective

Situation (specific when and where)

Behavior (only what was observable, no labels or mind-reading)

Impact (concrete effect on you, the team, or the work)

Optional question about their intent to open the conversation

When and where you will deliver it (private for anything corrective)

Exercise: Set Crystal-Clear Expectations for a Handoff

Pick one task you are about to delegate and pre-write the expectation so the person cannot misread it. Then tie it to a real motivator from the autonomy-mastery-purpose set.

- What does done look like, and how exactly will success be judged?
 - What are the constraints: deadline, budget, quality bar, and guardrails?
 - What authority level applies: decide alone, recommend then check, or ask first?
 - Which motivator are you leaning on (autonomy, mastery, or purpose), and how will you make it real for this person?
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Worksheet: Script the Difficult Conversation You Are Avoiding

Choose one crucial conversation you have been postponing and plan it step by step using the start-with-safety framework. Write the actual words you will open with, leading with facts before your story. The one issue, stated in a single sentence

Outcome you want for them, for you, and for the relationship

Contrasting statement (what you do NOT intend, then what you DO intend)

The facts first, in SBI form (observable behavior, dates, frequency)

Your story, stated tentatively as your view rather than the verdict

The open question that invites their perspective

How you will move to agreed action (who does what by when)

Checklist: Before You Have the Hard Conversation

- Picked a private setting with enough uninterrupted time
- Opened with mutual purpose and respect, not an accusation
- Led with observable facts before any interpretation
- Owned my interpretation as a story, not a fact
- Genuinely asked for and listened to their side
- Planned to watch for safety breaking and to pause and rebuild it if it does
- Ended with clear actions, owners, and a follow-up time

Running Effective Meetings and Driving Decisions

Reset your one-on-ones, audit and redesign your meeting calendar, and make decision rights and methods explicit.

Worksheet: Design Your One-on-One Operating System

Set up a real, protected one-on-one for each direct report using the One-on-One Agenda template. Plan the cadence and the opening questions that surface problems while they are small. Person and chosen cadence (weekly or biweekly) and length (30 to 45 min)

Standing time slot you will protect

Who owns the agenda (it should be them) and how they will bring topics

Two opening questions you will ask every time (e.g. what is on your mind, what is slowing you down)

One recurring growth or career thread to revisit

Where the shared running notes and actions will live

Exercise: Audit and Cut Your Meeting Calendar

List your recurring meetings, run the cost math on each with the Meeting Cost Calculator template, and decide the fate of each one. Be willing to kill, shorten, shrink the invite list, or convert to async.

- For each recurring meeting, what is its single purpose: inform, decide, solve, or brainstorm?
- Using attendee count, average loaded hourly cost, and frequency, what does each meeting cost per year?
- Which meetings are pure information-sharing that could become a written update?
- For each meeting, choose a verdict: keep as is, shorten, trim attendees, convert to async, or cancel.

Worksheet: Clarify Decision Rights for a Live Decision

Take one real upcoming decision and assign roles before the debate using DACI, then choose the decision method. This prevents the everyone-and-no-one deadlock.

The decision to be made and the deadline

Driver (who moves it forward)

Approver (single person with final say)

Contributors (who provides expertise or input)

Informed (who needs to know the outcome)

Decision method (command / consult / vote / consensus) and why it fits

How you will surface dissent and test real commitment (e.g. fist-to-five)

Checklist: Meeting and Decision Discipline

- [] Every recurring meeting has one clear purpose and the right attendees only
- [] Agendas go out in advance as questions to answer with desired outcomes
- [] Roles assigned: facilitator, timekeeper, notetaker
- [] Meetings start on time and end with decisions, owners, and due dates captured
- [] Decision rights named before the substance is debated
- [] Dissent actively invited and real commitment tested, not assumed from silence
- [] Every decision documented with the rationale, owner, and date

Performance Management and Building a High-Trust Team

Set measurable OKRs, run a fair process for underperformance, and commit to the specific behaviors that build trust and safety.

Worksheet: Write Your Team's OKRs for the Quarter

Draft one motivating Objective and three to five measurable Key Results for your team using the OKR Tracker template. Make every Key Result an outcome with a baseline and a target, not an activity. Objective (qualitative, time-bound, genuinely motivating)

Key Result 1 (metric, baseline, target)

Key Result 2 (metric, baseline, target)

Key Result 3 (metric, baseline, target)

Ambition type (stretch where ~70% is success, or committed you expect to fully hit)

How each Key Result ladders up to a company or higher-level objective

How often you will score progress (at least monthly)

Exercise: Diagnose and Plan an Underperformance Case

Take one real performance gap and work through the skill-will-environment diagnosis before choosing an intervention. Base it on documented facts, not impressions.

- Describe the gap with two or three specific, dated, observable examples.
 - Could the person do this if their life depended on it? Use that to decide: is it skill, will, or environment?
 - What is the right intervention given the cause (training, motivation conversation, or removing a blocker)?
 - If informal coaching has not worked, what specific, measurable goals, support, and review period would a fair PIP contain?
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Worksheet: Build Your Psychological Safety Habits

Translate trust and safety into specific behaviors you will repeat, and locate your team on the safety-versus-accountability grid. Be concrete about what you will start doing this week.

Where your team sits now (anxiety / comfort / apathy / high-performance learning zone) and the evidence

One way you will admit your own mistakes or say I do not know out loud

Your planned first-ten-seconds response when someone brings you bad news

One question you will use to invite dissent (e.g. what are we missing)

Which trust driver you most need to strengthen (competence, reliability, or care) and one action for it

One standard you will hold firmly so safety does not slide into low expectations

Checklist: High-Trust Performance System Check

- Team has three to five visible OKRs with measurable, outcome-based Key Results
- Stretch OKRs are separated from compensation so goals stay ambitious
- Underperformance is addressed early with documented, factual examples
- Interventions are matched to cause (skill, will, or environment)
- Any PIP is genuine, measurable, supported, and time-bound, with conversations documented
- I reward the messenger when bad news arrives instead of punishing it
- Similar situations are handled consistently and judged against the standard, not personality

Your Action Plan

1. Run the time audit for one week and rewrite your definition of a good leadership day.
2. Diagnose each direct report's development level on a current task and adjust your style to match.
3. Draft three pieces of SBI feedback you owe and deliver them within the next week.
4. Script and hold the one difficult conversation you have been avoiding, leading with facts and safety.
5. Set up protected weekly or biweekly one-on-ones for every direct report with a shared running doc.
6. Audit your recurring meetings with the cost calculator and cut, shorten, or convert at least one.
7. Assign DACI roles and a decision method for your next significant cross-functional decision.
8. Write one team Objective with three to five measurable Key Results for the quarter and share it.
9. Diagnose any current underperformance as skill, will, or environment and agree a supported plan.
10. Commit to one psychological-safety behavior, especially how you react in the first ten seconds to bad news, and practice it daily.

