

STARTING YOUR NEW LEADERSHIP ROLE WITH A BANG Resources



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Starting Your Ideal Leadership Role With A Bang!

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These resources are from the Ebook and Online Training:

Starting Your Ideal Leadership Role With A Bang.

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Describe Your Decision Making Principles (bottom line)



Take Inspired Action – Describe your decision making principles.



If you have completed your [Success Insights Profile](#) the sections called:

- ✓ Value to the Organization
- ✓ Ideal Environment
- ✓ Ways to Communicate
- ✓ Driving Forces
- ✓ Keys to Managing

may all provide clues to help you draft your principles.

If you haven't completed a Success Insights Profile, then take a look at your values and build from there.

IDENTIFYING YOUR NON-NEGOTIABLES



Take Inspired Action - Describe your non-negotiables



Understand Your Leadership Style More Fully

The scales below may help you to get clearer on how to let others know how to get the best from you. (Remember to go to the [Resources page](#) if you want to complete these in a word template or on Evernote)

How You Like To Communicate		
Formal	Informal
Set up appointment	Just turn up
Big picture	All the details
Your Email Etiquette		
Prefer face-to-face	Prefer email
Never cc me	Always keep in the loop
Check constantly	Check 3 x per day

How You Make Decisions		
On-the-fly	Time to deliberate
How You Want Those Reporting To You To Make Decisions		
Don't make decisions without consulting me	Decide collaboratively or make decisions but keep me informed
Your Risk Appetite		
High risk/rebel	Conservative/follow policy
How You Like Conflict To Be Resolved		
Avoided. It is disruptive	Welcomed. It is a constructive way to generate ideas
Never disagree with me in public. Challenge only when we are in private	Gloves off and/or challenge robustly/ publicly. If it is respectful, all is forgiven quickly
Where You Spend Most Of Your Time		
Majority of the time at my desk	Big proportion of time out with my team
The Message You Want Your Office To Send		
The power and the buck stops here	I am one of the team, working in a pod. Or if that isn't possible, lots of whiteboards, chairs, meeting desk in office

Describe how you like to receive/give feedback on performance

Describe a top performer in your team
Describe how you like to celebrate wins (include early wins)
Describe how you handle people who resist the direction you are moving

Top Five Derailing Behaviors	Check the box if you have received this feedback and/or know it is true
Focuses too heavily on details	<input type="checkbox"/> Doesn't see the big picture <input type="checkbox"/> Not sure he or she has a clear, long-term vision <input type="checkbox"/> Focuses too much on the 'how' not the 'why'
Jumps to hasty conclusions	<input type="checkbox"/> Seems like he or she hasn't thought through all the implications and weighed all the evidence before deciding <input type="checkbox"/> Makes big decisions before consulting the right people <input type="checkbox"/> Doesn't listen before making decisions
Easily swayed by others' opinions	<input type="checkbox"/> Doesn't seem to have a clear point of view <input type="checkbox"/> Agrees too often with others to avoid conflict <input type="checkbox"/> Changes his or her mind frequently with each new opinion or interpretation
Reacts negatively to criticism	<input type="checkbox"/> Comes across defensive in meetings <input type="checkbox"/> Verbal and nonverbal behavior makes it uncomfortable to give constructive feedback <input type="checkbox"/> Teammates and/or direct reports sometimes 'shut down' in meetings
Micromanages direct reports	<input type="checkbox"/> Reports do not get ownership of projects when working with him or her <input type="checkbox"/> Reports feel judged on every step of the project

Avoiding the Career Derailers

There are five key behaviors that cause people to derail as they move through more senior positions.

What action do you need to take to ensure you don't derail yourself? How can you keep yourself accountable to this?

Creating a Vision for Your First Year



Take Action: Brainstorm a list of possible outcomes you'd like to achieve in your first 12 months in this role/organization



Keeping Your Focus Tight



Take Action: Review your list from the previous exercise and pare your list down to 5-7 possible outcomes you want for your first year in this new role



Make Your Vision Come Alive

Take Inspired Action: Describe your vision for each of your outcomes

- ✓ What would you like to see/feel/hear by the end of day 1?
- ✓ What would you like to see/feel/hear by the end of week 1?
- ✓ What would you like to see/feel/hear by the end of month 1?
- ✓ What would you like to see/feel/hear by the end of month 2?
- ✓ What would you like to see/feel/hear by the end of month 3?

Here is an [Evernote template](#) you can use to describe your perfect end-result

Identify Key Stakeholders

Having one-on-one meetings with key stakeholders is a given for any new starter. If you haven't done so already, work with your manager to create a Stakeholder interview plan.

Identify the people who are critical to success. Don't just think internally either. Think of people external to the organization that could influence your success.

This could include suppliers, customers, previous mentors or contacts you have made over the years. [Here is an Evernote for you to make your notes.](#)

Up		
Person	Job Title	Reason for Meeting
Down		
Person	Job Title	Reason for Meeting
Cross		
Person	Job Title	Reason for Meeting
External Stakeholders (Clients/Suppliers etc)		

Person	Job Title	Reason for Meeting

Your First Team Meeting

You'll likely need to allow 45 minutes to an hour for this meeting. Depending upon how long you want to let them discuss their issues etc.

On the [resources page](#) is a [sample powerpoint](#) you can adapt for this presentation. See the notes section on the slides for additional pointers. Try not to make it 'death by powerpoint' session. Use images to depict what you are trying to say.

Analyzing the People You Have Interviewed

Thinking deliberately about each person, and how you can best flex your style and influence them to get the most from him or her is something that high-performers regularly do.

Click here to [get an Evernote template](#) you can use with each person you meet.

Describe How You Found The Person During The Meeting		
Direct and open	Closed and evasive
Accepting responsibility	Pointing fingers or blaming circumstance or the system
Broad view	Silo focus
Supportive of others	Inclined to find fault with/ gossip about others
Solutions in mind	Bogged down in the problem
Positive about direction	Negative about the direction of your team/ organization
Believes in the mission	Not connected to the mission
Excited	Jaded
Finger on the pulse	Disengaged
Strategic focus	Process focus
Results focus	Policy/procedure focus
Will help your team	Can't or won't help your team succeed

Below are two types of templates you can use, after you interview your key stakeholders, to help you gather your thoughts. This first template is the short and sharp version. You can [get these templates in Evernote](#)

Person	What I discovered (<i>listen and learn</i>)	How I Will Make Use Of What They Shared With Me (<i>Follow-through</i>)

This next template is longer. However, it is one I've used successfully in the past, particularly when interviewing external stakeholders

Current requirements (expected performance)
Ideal requirements (what we would look like if we were exceptional/over-delivering)
Future requirements
What we are currently doing well and should build upon
The things we must not change
What we need to stop doing
Capabilities we need to improve (technical, people, decision-making)
How they measure our successful performance
How we can get data to improve
What it would take for us to be ideal

Culture Snapshot

Use the following scales to rate your perspective on how you need to behave in this organization and where the challenges and opportunities may reside.

How People Interact		
As individuals	Team based
How Decisions Are Made		
Told what to do	Collaboratively
Buy-in To Organization's Reason For Being		
Not much	Fully committed
Interdependence		
Identify primarily with own team	Identify with organization (one team concept)
Knowledge/learning Shared		
Keep to self (knowledge is power)	Open/collaborative sharing
Power		
Controlled at the top	Shared
Risk Appetite		
Protect what we've got	Risk more to gain more
Openness To Change		
Closed/averse	Open/embrace

One Page Business Plan - Sample

This one page business plan, extracted from the [Mindset of a High Performance Employee training](#), you may find useful to use as a template for creating your Let's Transform This Section A - Potential Questions When Getting To Know Others

20xx Focus	Close 1 in 5 Prospects		
Key Objectives	<ul style="list-style-type: none"> Market development Customer Service 	<ul style="list-style-type: none"> Process Improvement People Development 	
Initiatives	<p>Market Development</p> <ul style="list-style-type: none"> Expand reach into regional areas Improve distribution strategy <p>People Development</p> <ul style="list-style-type: none"> All team members participate in Thought Patterns for High Performance Weekly one-to-one coaching on Predictable Selling Implementation 	<p>Customer Service</p> <ul style="list-style-type: none"> Implement Customer Service tracking system <p>Process Improvement</p> <ul style="list-style-type: none"> Activate Predictable Selling System Improve tracking of sales conversions Engage staff with easy to understand plans and access to progress reports 	
Goals	<ul style="list-style-type: none"> Greater than \$3.5K profit per month end Q2 Greater than \$4.0K profit per month end Q4 15 new regional clients by end of Q1 Conversion Sales to Prospect at least 1:5 by end Q3 		
Action Plan	What	When	Done
	Map out regional reach system	1 May	
	Review delegation system to free up time for coaching	15 Jan	
	Convene and lead project team to implement customer service tracking	11 Oct	
	Map out strategies for predictable selling	End Q1	
	Purchase software to track and report sales conversions	1 Mar	
Metrics	<ul style="list-style-type: none"> Number of team members using Predictable Selling System Number of potential customers in regional area aware of our presence % of visitors to site that purchase Revenue per employee % of team members discussing Sales Targets/Performance at each meeting % of people reporting receiving regular coaching and improved performance Profit Generated 		

Potential Questions When Getting to Know Others

Building The Foundation	Your Manager	Direct Reports	Peers	Other Managers
Tell me about yourself - (establishing rapport)	X	X	X	X
Tell me about your role and how it fits within the team and the organization	X	X	X	X
What 3 things should we be very proud of as an organization and why	X	X	X	X
What are the strengths of the organization / our team?	X	X	X	X
What's working well?	X	X	X	X
What are your highest priorities (how much capital, people, time and other resources do you have committed to that priority)?	X			
Can I help or get in the way of you achieving those priorities?	X			
How can I best work with you - so that we both achieve great results?	X	X	X	X
What are the three biggest things I can do to help you?	X	X	X	
What is my role in an emergency evacuation?	X			
Which policies do I own?	X			

Understanding The Culture	Your Manager	Direct Reports	Peers	Other Managers
How would you describe the environment (e.g. fun, serious, data driven, complex, etc.)?	X	X	X	
What are the informal rules in the department?	X	X	X	
What does the manager like/dislike?		X	X	
What in our culture is a positive and advances us? What hinders us?	X	X	X	
What does the department value most?	X	X	X	
Tell me about the key decision we make. Who makes them and how?	X	X		
Who, outside the department, are important stakeholders in decision making? how powerful or influential are they? What is the informal hierarchy?	X	X	X	
What is a recent management decision you did not understand?		X		
What do you need to do to be successful in the department / organizationally	X	X	X	X
What are you rewarded for?	X	X	X	
What are lessons to teach, so new employees don't learn those lessons the hard way?	X		X	
What are the three most important things to know about the organization?	X	X	X	X
Why do people stay/leave here?	X	X	X	

Understanding The Culture	Your Manager	Direct Reports	Peers	Other Managers
How do you feel at the start of the work week?		X		
How do you feel at the end of the work week?		X		
What are the norms around punctuality?	X	X		
What motivates senior management?	X	X	X	
See if you can discover any untouchable... those things that don't make logical sense, but for some reason exist and you probably shouldn't mess with ... especially in the early days	X	X	X	

Understanding Your Team's Performance	Your Manager	Direct Reports	Peers	Other Managers
How do people/customers (internal/external) think we perform as a team?	X	X	X	X
What process is used to collect our customers' needs and measure their satisfaction?	X	X		
How are goals set? Are they ambitious?	X	X		
What happens if goals aren't met?	X	X		
What are the top three goals of this team?	X	X		
When/where do we benchmark?	X	X		
If performance has been good/poor, what has caused that?	X	X		
How does the XXX's strategy, technical capability, culture impact on performance?	X	X		
What change efforts has been tried - how did they work out?	X	X		
What are the key processes of the team? Are they performing acceptably in terms of cost, quality, reliability, timelines, customer excellence?	X	X		
What are the measures of success in your role? How are you tracking against them?		X		
What are the key metrics to track progress and success?	X	X		
What are the short/long term priorities?	X	X		

Understanding Your Department/ Division's Priorities	Your Manager	Direct Reports	Peers	Other Managers
How do people/customers (internal/ external) think we perform as a team?	X	X	X	
What are the top three goals of this department/division?	X	X	X	
How is the department/division success measured?	X			

Understanding People & Work Style Preferences	Your Manager	Direct Reports	Peers	Other Managers
What is the path that led you to this team?	X	X	X	X
How would you like me to communicate with you (mode, manner, frequency, disagreements)?	X	X		
How do you like to be approached regarding an issue or challenge?	X	X	X	X
How often should we meet one-to-one		X		
What style of leadership brings out the best in you?	X	X		
What are your strengths/weaknesses?	X	X		
What projects have you worked on that best use your strengths?		X		
How are we under-using your strengths?		X		
What would you like to work on?		X		
What insights do you have on how I should manage my manager?		X	X	
What are your career objectives?	X	X		
What is your definition of a top performer?	X	X		

Identifying Blockages	Your Manager	Direct Reports	Peers	Other Managers
What gets in your way of you doing your job?		X		
What 3 things would you change around here and why?		X		
What are the weaknesses and opportunities organizationally in our team?	X	X	X	X
What are the most formidable barriers to making needed changes?	X	X	X	
What are some of the challenges that previous incumbents in this position have encountered?		X	X	

Identifying Opportunities	Your Manager	Direct Reports	Peers	Other Managers
Do you have a sense of how the team might be able to score a 'quick win'?	X	X	X	
What new capabilities need to be developed or acquired?	X	X	X	
If you were me, where would you focus?	X	X	X	X
What support do I need to achieve success for my team?	X			
Are there islands of excellence or other high-quality resources that would be leveraged?	X	X		
What is the state of the talent in my team?	X			

Your Personal Success	Your Manager	Direct Reports	Peers	Other Managers
What are the major risks associated with my position - to me, to my team?	X		X	
What are your greatest concerns as I step into this role?		X		
What are you looking forward to as I step into this role?		X		
What does success look like for people in my role?	X	X	X	
What is the one behavior or trait you have seen detail leaders' careers in this organization	X		X	X

Section B - Onboarding Checklist

Place a mark as you complete each item. Be proactive. At the start of each period, put into your diary the actual activity, where you will be and who you will be doing it with. You've got a much better chance of actually achieving each of the key milestones/outcomes if you put it in your diary

Week 1 Measure Of Success Checklist	
I have been introduced to the people in my team (up, down, across)	
I know what to do if I am (or someone in my team is) sick and can't come to work	
I have reviewed and am committed to the Code Of Conduct and Values	

Week 1 Measure Of Success Checklist	
I have met with the People & Culture person responsible for my area	
I have an up-to-date Organization Chart for my Division and Department	
I know how our business unit fits within the overall company structure	
I know where to find Organization Charts for other Divisions	
I have been provided with and/or know where to source copies of the Corporate Vision and other supporting strategies	
My manager and I have discussed, and I have a clear understanding of my role responsibilities and requirements	

Week 2 Measure Of Success Checklist	
My Manager and I have agreed upon my goals for the next month	
My Manager and I have discussed how we will interact on a regular basis (email, face-to-face etc)	
I understand the Corporate Vision and the impact my role has on it	
I have reviewed the Operational/Department Business Plan and understand how my role and my team impact on its success	
I know where to find Policies on the intranet	
I have read and understood key policies	
My Manager and I have begun identifying a "Let's Transform This"	
I know which regular meetings I need to attend, when they are my role	
I understand how our Division and Department fit into the organization	
I have been to another Division for a site visit	
I have used the Values and our Department behaviors during the past week	

Week 2 Measure Of Success Checklist	
I have met with all my Direct Reports and have shared a consistent message with them, as I have listened and gathered information	
I have got an Acronym/Jargon buster list	
I know how to self-manage Leave Applications and approve Leave applications for my direct reports	

Week 3 Measure Of Success Checklist	
I understand how my performance will be measured and what results are important	
My Manager and I have begun a conversation about the resources myself and my team might need (physical, tie, influence, \$ etc)	
I am getting a good handle on the pain points and key challenges in my role	
I have a good understanding of the roles and responsibilities of each go my team members	
I have a good understanding of what my team requires from me	
I have proactively met with all the Key Stakeholders (up/ down/ across) who interact with my area of responsibility and have provided information on my background, vision and style	
<p>I know how to find, use and submit the following Commonly Used forms:</p> <ul style="list-style-type: none"> • Change of Banking and Employee Details • Out of Pick Expenses • Learning and Development Application • Travel Request Form • Entertainment and Hospitality Expenditure • Invoice Request • Request New Vendor 	
I understand the performance evaluation system	

Week 3 Measure Of Success Checklist	
I have a clear set of performance goals that my performance will be evaluated against	

End 1st Month Measure Of Success Checklist	
I have met with my Manager and discussed my progress to date	
I have assessed how far down in the organization the vision, strategy and values are used to inform decision-making and drive behaviors. I have made decisions about what I want to influence, what I'll need to live with and I want to address	
My Manager and I have discussed my observations of the culture	
My team and I have discussed my observation of the culture	
My team and I have mapped out and analyzed our key processes and have out plans in place for improvement	
I understand my Manager's hot points and how I can best support him or her	
I have help a team meeting and shared my expectations, vision	
I have identified and implemented at least 3 early wins the team could achieve	
I have identified and implemented at least 3 early wins I personally can achieve (for example remove minor, but annoying irritants (e.g. excessive/poorly run meetings, improve work flow or resources, remove unnecessary bureaucracy)	
I have identified the behaviors that need to shift in my team and I have begun role-modeling them and speaking about them to the team	
My Manager, my team and I have agreed on a "Let's Transform This" and have detailed what success looks like	

End 1st Month Measure Of Success Checklist	
<p>We have described the perfect end-results of the “Let’s Transform This”</p> <ul style="list-style-type: none"> • What you and the team have achieved • How people will be behaving • What they will be doing differently • What they will be talking about • what you will be seeing/hearing that is different • What others outside your team will be saying 	
I understand and can explain the key priorities of each of the Divisions	
I understand and can explain how we interact with and impact upon other Departments	
I understand and can explain how we interact with and impact upon other Divisions	
My manager and I have created an Individual Development Plan for myself	

End 2nd Month Measure Of Success Checklist	
My team and I have developed an action plan for our “Let’s Transform This”	
We have milestones and targets in place that measure the success of our “Let’s Transform This”	
I have built momentum with my team on the Vision and expectations and I am regularly reinforcing the behaviors I expect	
I have completed my Trimetrix profile and have worked with my Manager to identify how to best use my strengths and minimize the impact of my weakness	

End 1st Quarter Measure Of Success Checklist	
I have met with my Manager and discussed my progress to date and Development plans for the next 12 months	
I have done some form of team building exercise with my direct reports	
I have created performance measures and my team and I are actively tracking performance	
I have provided performance feedback to all my team members (both formal and informally)	
I have identified the people in my team that I need to coach up or coach out	
My team and I have made progress in the "Let's Transform This"	
I have provided people & Culture with feedback about my on boarding experience	
I am meeting regularly with my Coach	

End 2nd Quarter Measure Of Success Checklist	
I have met with my Manager and discussed by biggest contributions to date and how my performance is tracking	
My Manager and I have discussed what I would like to focus upon through the remainder of the year	

End 3rd Quarter Measure Of Success Checklist	
I have attended learning and development programs and build relationships with people outside my direct sphere of influence/ concern	
I have improved my skill/mindset in at least three different areas	
I have asked for and acted upon feedback from my team and my Manager	

End 3rd Quarter Measure Of Success Checklist	
I have coached up or coached out people who are not performing at their best	
I can describe at least six instances in the past month when I have used my Operating Principles and Non-Negotiables in conversations	

End 4th Quarter Measure Of Success Checklist	
I have discussed with People and Culture my experience of the first year	
I have re-set personal and professional goals	
I am building momentum in my team and settling in to make a positive impact	
I am starting to think about next roles Maybe 2-3 years down the track ... and the skill/mindset I'll need to start developing now to be ready for those opportunities	

Section C - Personal Brand Activity

Describe your decision-making principles

1

2

3

Describe your non-negotiables

1

2

3

MY ONE PAGE PERSONAL BRAND

My Vision Statement
My Mission Statement
My Values
My Personal Decision Drivers
My Business Decision-making Principles
My Non-Negotiables
My DISC profile strengths
My Workplace Motivators

To get the exercises/activities that help you complete all sections of this One-Page Personal Brand access these programs:

1. Mindset of a High-Performance Employee
2. Insights to Success

[Get the Evernote template of this document here](#)

About Shelley Holmes

Using tools, tips, ideas and strategies that help them to be really clear about what is 'success critical' and how to get there fast, **Shelley guides leaders to flourish as they live, love and lead at a remarkable level** making the dent in the universe they are destined to.

For several years, Shelley was a key leader in a High-performance Organization (that had national and international recognition). It is this real-world experience that underpins and brings to life the theory and insights gained, from her deep study of high-performance leadership.

Around the globe, she has worked with organizations (with total revenues in excess of \$116 billion) and supports thousands of individual leaders through, coaching, consulting, workshops, webinars, audio programs and the Make A Dent Leadership website (which has over 5,000 visitors per day).

Shelley's Philosophy...

Whether you like it or not, the way that you show up at work defines you as a human being.

On grand and small scales, the way you interact with others, the products and services you are a part of delivering, all roll together to become a part of the legacy that you leave behind. The way you deal with others, the things you teach them, that cause them to grow, and become a better version of themselves as individuals, work colleagues, leaders, and parents ... now that defines who you are!

There are hundreds of resources like this at [Make A Dent Leadership](#) where you can join our community of leaders who are focusing on being inspired and inspiring and making their dent in the universe.

If you are ready to be the best possible version of yourself, to lead with more energy and passion than you thought possible... if you are ready to make a dent in the universe ... then visit:

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