ChangeWise

Pioneer in Leadership Agility

"Leadership Agility Accelerator"
Guidelines for Client Orientation & Action-Planning

Whether or not you will be using the Accelerator with an individual client or with a group, before you make your purchase, review a separate document on how to purchase for individuals and groups, as well as the guidelines below on how to orient your client and assist with the action-planning phase.

Client orientation

Tell them the tool has 4 parts:

1. They will identify 1-2 things they're trying to accomplish as a leader (if any) in each of the three arenas: Leading organizational change (for any improvement project, regardless of size), Leading teams (including informal teams), and pivotal conversations.

2. They will be guided to assess their own level of leadership agility in the 3 arenas and overall.

3. They will choose 1-3 "leadership agility practices" to work on, each designed to stretch them to an agility level beyond their self-assessed level while helping them accomplish what they're trying to do as a leader.

4. They can fill out an action plan template for each practice they've chosen. (See below for different options for this step)

Tell them the output will be a PDF report that captures key information from all 4 parts of the tool.

Help them adopt a mindset that will maximize an accurate self-assessment. (These are all stated within the tool, but guidance from you is likely to carry even more weight):

- Tell them they should not assume that a particular response is always more desirable than another. The most effective leadership approach depends partly on situational factors.

- Tell them they will be asked to identify their most *typical* approach, *not* if they have *ever* done things in a particular way.

- Stress that, to get the greatest value, they need to fill out the self-assessment portion as honestly as possible.

Options for navigating the Accelerator

Tell them that the online instrument gives them the option to go back and check or re-do entries on previous pages. They will also have the option of logging out part-way through and coming back later to complete their work. However, once a report has been generated, it cannot be changed or re-done.

Preparing for the action-planning step

The Accelerator's instructions for the action-planning module will be to choose 1-3 leadership agility practices to work on, then create an action plan for each practice using the template provided. You will receive an email notification when your client completes, and you'll be able to access the report on your dashboard.

Prior to having your client use the tool, tell them about the options for action planning.

- One option is to have your client can completely fill out the action planning template on their own, prior to submitting to get their PDF report. You and your client can then have a coaching session where you to discuss their action plan.

- A second option is to have them leave the action planning template blank – or do a first draft – then review the report with you as part of a coaching session where you help them flesh out their 1-3 action plans.

For several reasons, we recommend that you and your client use the second option:

- First, not all clients are great at doing a final-draft action plan on their own that is as specific as it needs to be to remain useful over time.

- Second, clients benefit from being able to discuss their action plan with a coach before they finalize it.

- Third, unlike the Leadership Agility 360 Development Planner, the action plan template used in the Accelerator report does not have a section for identifying mindset shifts. But the Accelerator Action Planner we can send you does have this section.

Action-plan template options

If you and your client decide they will leave the online template blank or used it to do a draft, you will want a separate *blank* template to use to finalize action plans with your client. This one-page template is included in your "Accelerator Coach Kit." You can make copies of it and use it as many times as you wish. Should you misplace it, write to Linda Smith at LS@changewise.biz.

Unlike the online Accelerator action plan template, this template includes a place to help your client identify the mindset that will support your client in practicing new leadership behavior, as well as the mindset that underlies current behavior your client wants to change.