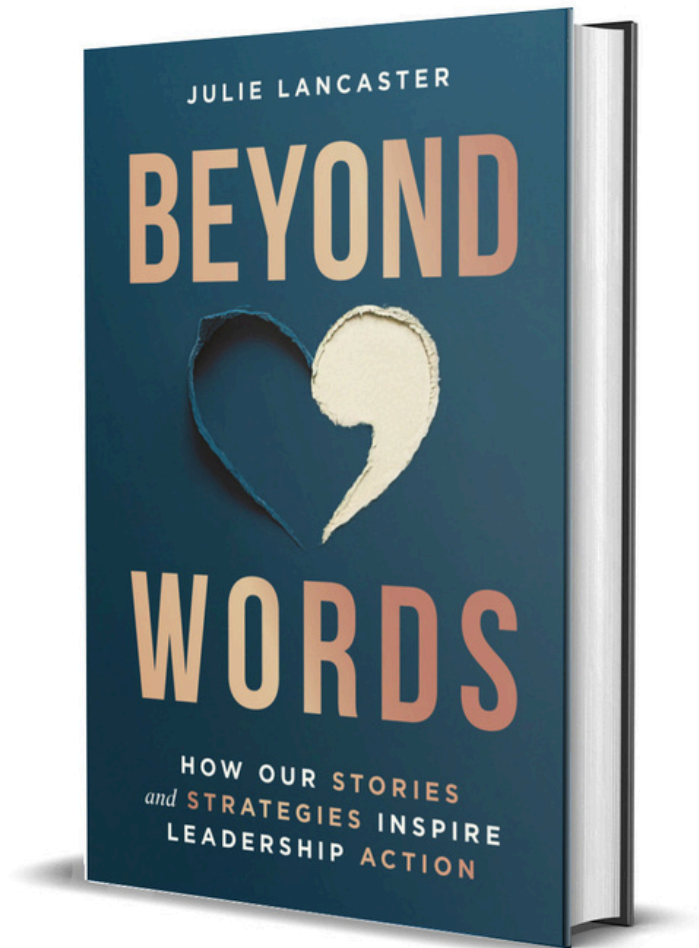


# Beyond Words Guide Book



**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

*This Guide Book is a supplement compiled by Lancaster Leadership to support:  
"Beyond Words" by JULIE LANCASTER, 2025*

[WWW.LANCASTERLEADERSHIP.COM](http://WWW.LANCASTERLEADERSHIP.COM)

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# Beyond Words Guide Book

## *The REST Method for Storytelling*

At the heart of Beyond Words is the REST Method—a four-part framework designed to help you craft stories that inspire action, build connection, and elevate leadership. Whether you're leading a team meeting or delivering a keynote, this method transforms lifeless reporting into meaningful storytelling.

Your stories live between the chaos and the mundane. With REST, you'll learn to uncover them, shape them, and share them with purpose.

### The REST Method Breakdown

<b>Relate</b>	Choose stories that resonate with your audience or illustrate a relevant point.
<b>Engage</b>	Speak with your audience, not at them. Use body language, eye contact, and micro-check-ins like “Can you relate?”
<b>Short</b>	Keep it concise. Aim for 3 minutes or less to maintain attention and impact.
<b>Theme</b>	Know your point. Use the WAIT lens: Why Am I Talking? What do you want them to walk away with—resilience, optimism, creativity?

### Practice Challenge: The Three-Minute Rule

Dr. Robert Cialdini, a leading researcher on influence, suggests that three minutes is the sweet spot for powerful storytelling. Try this:

1. Draft a story using the REST Method.
2. Time yourself sharing it aloud.
3. Edit for clarity, impact, and brevity.

# Beyond Words Guide Book

## ***PART 1: FOUNDATIONS OF LEADERSHIP THROUGH STORYTELLING***

### **CHAPTERS 1-3: JOT IT DOWN**

Write down any experiences, ideas, and action steps that this chapter brought to your mind.

# ***PART 1: FOUNDATIONS OF LEADERSHIP THROUGH STORYTELLING***

## **CHAPTER 1: UNDERSTANDING YOUR NARRATIVE**

Choose a topic to write a story about and jot down anything that flies in. Sometimes the right story comes to me in two minutes; sometimes it takes two weeks. To get started, think of a time when you were surprised, when life was hard, when you made a mistake, or when your perspective shifted. Don't worry about crafting the story yet. Just collect the memories that come to you.

## **CHAPTER 2: CRAFTING STORIES WITH PURPOSE**

Keep a notebook, download an app, or set up an online document that's ready anytime, anywhere you think of a story. Make a habit of jotting down story ideas immediately when you think of them, or just like the dreams we dream at night, they grow hazy in our memory.

## **CHAPTER 3: LANGUAGE & IT'S IMPACT**

Build your own language bank. Start from scratch or adapt the Language Bank in the appendix to suit you.

# Beyond Words Guide Book

## ***PART 2: LEADING STRATEGY WITH STORY***

### **CHAPTERS 4-7: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 2: LEADING STRATEGY WITH STORY***

### **CHAPTER 4: AUTHENTIC LEADERSHIP THROUGH STORYTELLING**

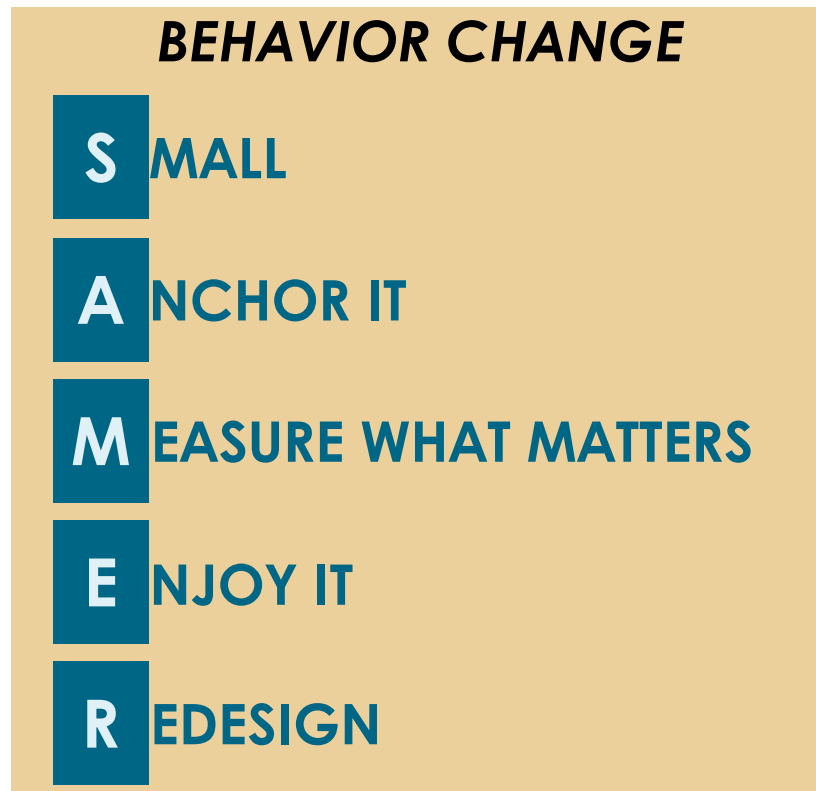
Choose one essential leadership quality to focus on developing in yourself. Either select one that you already live out to maximize or pick an area of opportunity that you want to grow in. Take the assessment.

## **B.O.S. MODEL**





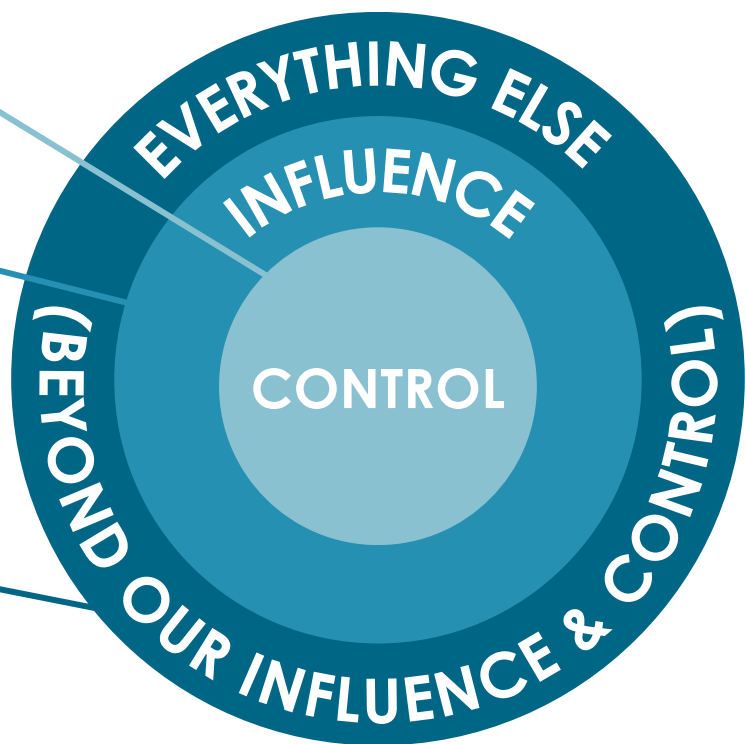
## PART 2: LEADING STRATEGY WITH STORY



**Within Control:**  
My thoughts, emotions,  
and behaviors

**Within Influence:**  
Thoughts, emotions, and  
behaviors of others  
through questions,  
empathy, and perspective

**Within  
Everything Else:**  
Thoughts, emotions, and  
behaviors of others



## ***PART 2: LEADING STRATEGY WITH STORY***

### **CHAPTER 5: VALUES-FOCUSED LEADERSHIP**

Identify or review your personal core values and evaluate how you are or aren't living them out in your life and work. Could you create or dust off team values?

### **CHAPTER 6: LEADING YOUR TEAM'S TRANSFORMATION**

Identify a culture transformation that your team could make, and develop your facilitation strategy using the steps and checklist in this chapter.

## ***PART 2: LEADING STRATEGY WITH STORY***

### **CHAPTER 7: EFFECTIVE PLANNING & EXECUTION**

If you don't have a strategic plan, map out how you might create one. If you do have a strategic plan in place, run it through the steps. If you're not reviewing it regularly with your team, or if it's time to update or strengthen your plan, start working on that today.



# Beyond Words Guide Book

## ***PART 3: LEADERSHIP CHALLENGES & ADAPTATION***

### **CHAPTERS 8-11: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 3: LEADERSHIP CHALLENGES & ADAPTATION***

### **CHAPTER 8: EMBRACING CHANGE**

Honestly assess your team culture. Do you welcome both failures and successes? Work through the five ideas to see where you'd like to invite change, and then start making the changes that will have the greatest positive impact.

### **CHAPTER 9: EMBRACING JOY**

Make a habit of setting your phone aside every time you speak with someone. Try making a list of at least three habits that you can start changing to be more present for your family, friends, coworkers, and self.

## PART 3: LEADERSHIP CHALLENGES & ADAPTATION



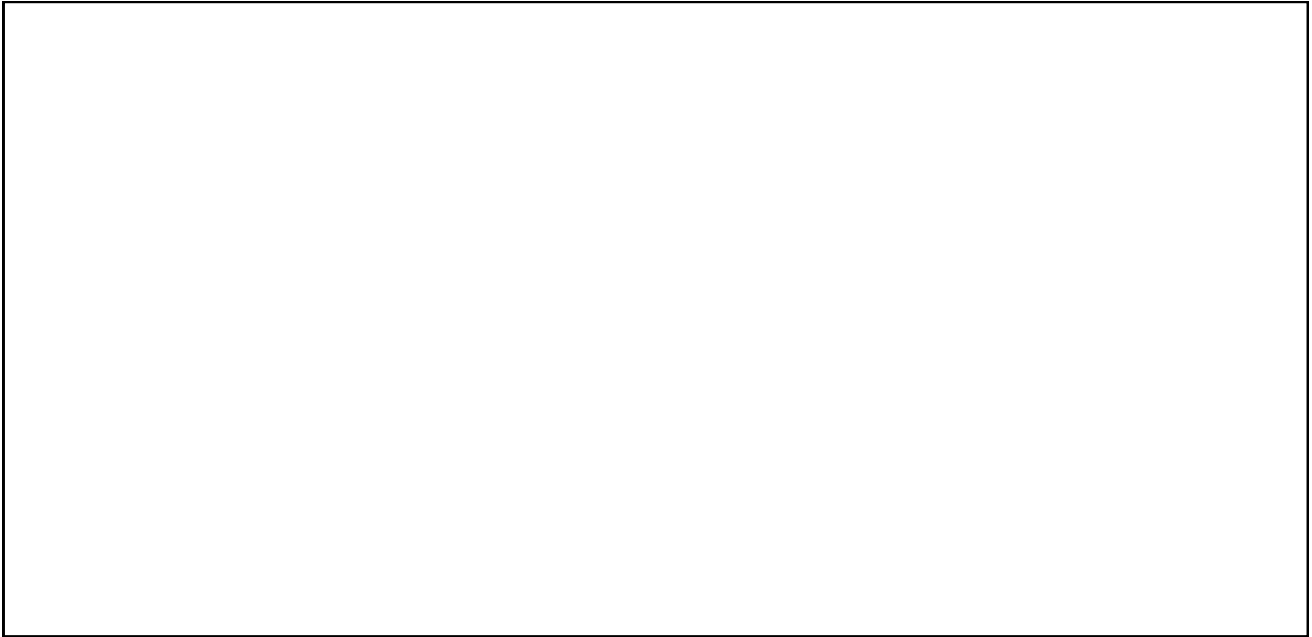
### CHAPTER 10: FUTURE-FOCUSED LEADERSHIP

Imagine your team (and yourself) in five years achieving incredible success. What does it mean that you're successful? What are you doing? What is your team doing? What has changed? What is the culture like? Be as specific as you can so that you can map out a plan to get there.

## ***PART 3: LEADERSHIP CHALLENGES & ADAPTATION***

### **CHAPTER 11: DEFINING YOUR LEADERSHIP PHILOSOPHY**

Sit down today and follow the steps to create your leadership philosophy, aspirational obituary, or vision board. You'll end up with a clear vision of who you want to show up as every single day. And start Homework for Life to collect your stories.

A large, empty rectangular box with a thin black border, intended for the reader to write or draw their leadership philosophy, aspirational obituary, or vision board.

# Beyond Words Guide Book

## *PART 4: BUILDING CONNECTION & PERSONAL GROWTH*

### **CHAPTERS 12-14: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.



## **PART 4: BUILDING CONNECTION & PERSONAL GROWTH**

### **CHAPTER 12: THE IMPORTANCE OF CONNECTION**

The greatest impact you can have on another person is by giving them a feeling of confidence, hope, or happiness. Write down a few names: Who will you deepen a connection with next? How will you boost your oxytocin?

### **CHAPTER 13: CREATING A LIFT-AS-YOU-CLIMB CULTURE**

Identify someone in your life with whom you're competing for something—often it's subconscious—and look for opportunities to develop that relationship. Allow yourself to step away from a zero-sum game into an abundance mindset. And write a few names: Who could you lift?

### **CHAPTER 14: COACHING & MENTORING**

Make a plan to invest time and energy into helping your team members grow. On a scale of 1-10, how much do you care about developing others? Who specifically jumps to mind? With another 1-10 scale, how much effort are you putting into developing them? If you would like the score to increase, choose one of the four ways of developing others listed above to implement this week.

# Beyond Words Guide Book

## ***PART 5: COMMUNICATION & FEEDBACK***

### **CHAPTERS 15-18: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 5: COMMUNICATION & FEEDBACK***

### **CHAPTER 15: STRATEGIC COMMUNICATION**

Think of something important you need to communicate (or improve communication on) and work through the Rolling Out Change Checklist to begin developing your plan for effectively sharing the information.

### **CHAPTER 16: STRATEGIC LISTENING**

Start your six-week journey to strategic listening today. Without overthinking, what comes to your mind with this question: What's at stake if you don't work on your listening skills?

## ***PART 5: COMMUNICATION & FEEDBACK***

### **CHAPTER 17: NAVIGATING DIFFICULT CONVERSATIONS**

Take a moment right now to evaluate yourself on the five contexts of coaching. Looking back at all the coaching tips from this chapter, which one do you want to put maximized energy into?

### **CHAPTER 18: SEEKING & UTILIZING FEEDBACK**

Who would you like to practice the 5:1 rule with? And who might you have a courageous conversation with? Map out your plan for both.

# Beyond Words Guide Book

## ***PART 6: ENCOURAGING INNOVATION & INITIATIVE***

### **CHAPTERS 19-21: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 6: ENCOURAGING INNOVATION & INITIATIVE***

### **CHAPTER 19: ENCOURAGING INNOVATION THROUGH RISK-TAKING**

Schedule innovation time on your calendar every week and encourage your team to do the same. Then guard that time. It's your opportunity to focus on a project you're interested in, look at an old problem in a new way, or brainstorm ideas on your own or with your team. What problem area might you reimagine?

### **CHAPTER 20: BULLETPROOF YOUR INITIATIVES**

Introduce the term to them and then ask your team how well they think you collectively red team. What could be done better? Consider working through your strategy together to further refine it as a practice for future initiatives.

### **CHAPTER 21: FINDING ADVENTURE & EXPLORATION**

Dream up ideas for a possible break from your daily routine—whatever will bring you joy and energy, and you don't need to know how you could make it happen yet. Alone or with others, take a WWOOF adventure, climb a mountain, go to a workshop, or do a food tour of Lima. Maximize the time and budget you have available to go off the working grid and revive your energy and creativity.

# Beyond Words Guide Book

## *PART 7: BUILDING STRONG TEAMS*

### **CHAPTERS 22-24: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 7: BUILDING STRONG TEAMS***

### **CHAPTER 22: CREATING HIGH-PERFORMING TEAMS**

During your next presentation or meeting facilitation, ask a colleague to use the Make It Interesting Feedback Form to give you feedback. Plan a team-building activity with your team.

### **CHAPTER 23: CREATING AN EFFECTIVE ONBOARDING PROCESS**

Select one aspect of onboarding to start improving today. Can you recite your organization's mission, vision, and values? Talk with your team about what current actions align, and if anything is missing.

### **CHAPTER 24: SUPERVISING TEAMS EFFECTIVELY**

Take the Leader Versus Boss Quiz and do the Supervisor's Checklist. What did you learn about yourself?



# Beyond Words Guide Book

## *PART 8: TIME MANAGEMENT & PRODUCTIVITY*

### **CHAPTERS 25-27: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 8: TIME MANAGEMENT & PRODUCTIVITY***

### **CHAPTER 25: STRESS MANAGEMENT**

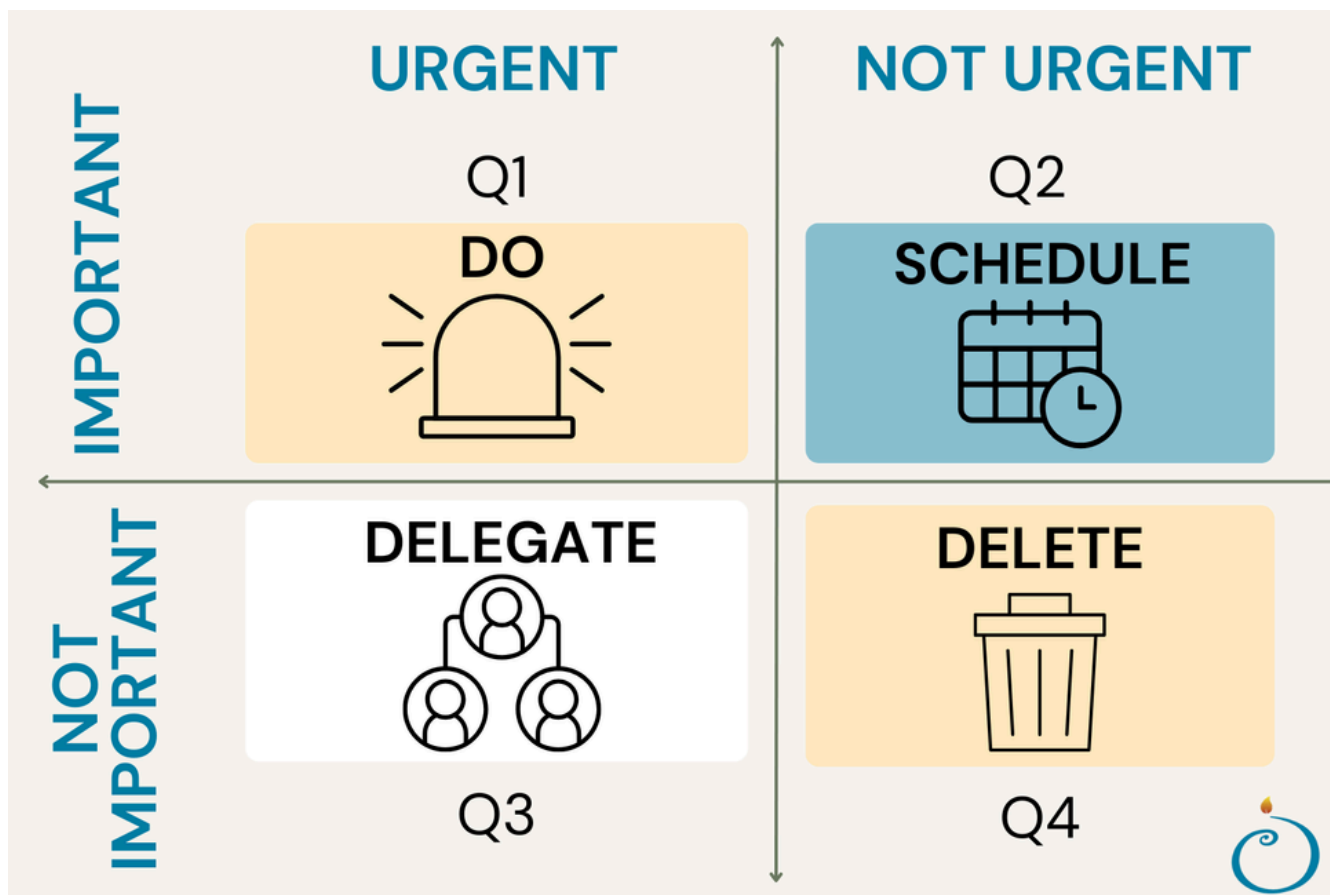
Get curious. How are purpose, growth, and community alive in your life right now, at work and at home? What does ikigai, a purposeful life worth living, mean to you?

### **CHAPTER 26: SETTING BOUNDARIES & PRIORITIES**

Find a coach or find an accountability partner. Pull up your calendar now. Schedule windows of time to sit back, kick your feet up, and take a thirty-thousand-foot view of your life.

## CHAPTER 27: MASTERING TIME MANAGEMENT

Write down how you currently organize your day and week. Now which of the above strategies might you like to try?



# Beyond Words Guide Book

## *PART 9: REFLECTION & PERSONAL DEVELOPMENT*

### **CHAPTERS 28-31: JOT IT DOWN**

Write down any experiences, ideas, and action steps that these chapters brought to your mind.

## ***PART 9: REFLECTION & PERSONAL DEVELOPMENT***

### **CHAPTER 28: FAILURE & RESILIENCE**

Think about a mistake you've made that you haven't told others about. It could be small or big. Now write it down or tell someone. Taking it out of the recesses of our mind allows us to shine the light on it and move forward. Reflect: Is there something I would do differently next time? You've just converted your mistake into a life lesson.

### **CHAPTER 29: OVERCOMING IMPOSTER SYNDROME**

Give a quick response: What do you want to give yourself more permission to do? Once you've got that, contemplate, how is it going with ramping up your storytelling? Are your stories relatable, engaging, and short, and do they have a theme (the REST Method)? And lastly, what's a quick one-liner you can tell yourself the next time you experience imposter syndrome?

## ***PART 9: REFLECTION & PERSONAL DEVELOPMENT***

### **CHAPTER 30: REFELCTING ON PERSONAL ROOTS & IDENTITY**

Take some time to reflect on your past. How has it shaped you? What is unique to your experience? Think of moments that have seemed pivotal to who you are today and jot them down to craft into stories.

### **CHAPTER 31: PRACTICING GRACE & GRATITUDE**

Remember that everyone has a backstory. Who do you want to give grace to today? And email me, [julie@lancasterleadership.com](mailto:julie@lancasterleadership.com), with one of your three-minute vulnerability stories. I would love to read it.

# LANGUAGE BANK

Use these examples of expressions or statements as a starting point for communicating effectively with your team on the following topics:

- **ACCOUNTABILITY.** Managers: Your A players will leave if you tolerate C players.
- **AUTHENTICITY.** Is there anything you are pretending not to know?
- **BREVITY.** I'm sorry I didn't have time to write you a shorter letter. (sometimes Abraham Lincoln)
- **CHANGE.** When rolling out change, leaders need optimism and honesty.
- **COACHING.** Coach (verb): To push with heart and ask a ridiculous number of questions.
- **COACHING.** To be a coach, you should have one.
- **COMFORT ZONE.** Leaders, get comfortable with being uncomfortable.
- **COMPARISON.** Comparison is the thief of joy. (three different quoted authors)
- **CONSISTENCY.** How we do anything is how we do everything. (Martha Beck)
- **CREATIVITY.** Creativity craves chaos and constraints. (Scott Novis, I think)
- **CURIOSITY.** How to invite others into the conversation: How do you see it? What's your point of view?
- **EXPECTATIONS.** It's easier to lighten up than tighten up. (from the school of teaching)
- **GROWTH.** If you're not growing, you're dying.
- **INFLUENCE.** Curiosity begets curiosity. Inquiry begets inquiry. Empathy begets empathy. Not always but often.
- **INTEREST.** Solicit interests instead of force-feeding facts.
- **LEADERSHIP.** Leadership is influence.
- **MINDSET.** Assume positive intent. Or choose the charitable assumption.
- **MINDSET.** Leadership is a mindset, not a position.
- **MINDSET.** What we focus on expands. Or where focus goes, energy flows. (Tony Robbins)
- **PASSION.** Passion erodes strategy. Often. So beware.
- **PERFECTION.** It's not about perfection; it's about recovery.
- **SELF-CARE.** You can't get water from an empty well. Self-care is a must.
- **SELF-AWARENESS.** If you can spot it, you've got it. The strengths you admire in others are within you.
- **SELF-EMPOWERMENT.** Are you bobbing along the current or using your oars?
- **STRATEGY.** Slow down to speed up.

# ***LANGUAGE BANK***

- **SUCCESS.** You should not have success as a goal if you are not interested in being uncomfortable.
- **TRUST.** A true mark of a healthy team is if they have a low-filter, high-trust environment.
- **VALUES.** All behavior is connected to values.
- **VULNERABILITY.** To embark on transformation, we must be ready, able, and willing (RAW).
- **WEAKNESSES.** An overutilized strength can be a liability.



# GLOSSARY

Concepts and phrases for leadership culture creation (beyond everyday language):

- **Ambition-Based Learning:** A learning approach where individuals set and pursue personal goals to drive their educational development.
- **Art of Interruption:** A deliberate strategy to break into a monologue instead of waiting until someone provides space for contribution. Critical thinking skills are necessary to know when and how to appropriately interrupt.
- **Aspirational Obituary:** A reflective exercise imagining how you would want to be remembered, used to clarify values and goals.
- **Bandwidth:** The capacity to handle a particular amount of work.
- **BEST (Courageous Conversations):** An acronym in the "Courageous Conversations" framework representing Behavior Effect Solve Thank, used to facilitate open dialogues.
- **Big A Agenda:** The overarching, strategic objectives that guide a direction, whether it be for an organization or a coaching journey, as opposed to smaller, tactical actions.
- **Bottom-Lining:** The practice of distilling information or discussions down to their essential points to ensure clarity and efficiency.
- **Boundaries:** Limits set to protect personal space, time, and energy in relationships and work. Also called guardrails.
- **Career Trajectory:** The progression and pattern of an individual's work experiences and roles over time.
- **Challenge the Process Mindset:** An approach that encourages questioning existing procedures and seeking innovative methods for improvement, stemming from James Kouzes and Barry Posner.
- **Clifton Strengths (a.k.a. Strengths Finder):** A personality assessment identifying an individual's top talents to leverage for success.
- **Coaching by Numbers:** A numeric-driven coaching method that uses a number scale to assess the current state as well as goals state in attempts to bring clarity.
- **Confirmation Bias:** The tendency to favor information that aligns with existing beliefs while ignoring contradictory evidence.
- **Comfort Zone:** A psychological state where tasks feel familiar, minimizing stress and risk but limiting growth. Effective leadership often includes expanding one's comfort zone.
- **Contrasting:** A communication technique used to clarify misunderstandings by juxtaposing what something is with what it is not.

# GLOSSARY

- **Decision Tree:** A graphical representation used to map out decisions and their possible consequences, aiding in decision-making processes.
- **Deliverables:** Specific outputs or products that are due upon the completion of a project or a part of a project.
- **Design Thinking:** A problem-solving methodology that involves understanding desired change, redefining problems, and creating innovative solutions to prototype and test.
- **Designed Alliance:** An intentional agreement between parties outlining how they will work together, communicate, and support each other to achieve common goals.
- **DISC:** A personality framework that categorizes behavior into four styles: Dominance, Influence, Steadiness, and Conscientiousness.
- **Drakensberg Mountains:** A mountain range in South Africa known for its dramatic scenery and cultural significance.
- **Eisenhower Matrix:** A time management tool prioritizing tasks by urgency and importance.
- **Emotional Intelligence:** The ability to recognize, understand, and manage emotions in oneself and others.
- **Energy Management:** The strategic regulation of one's physical, emotional, and mental energy to maintain productivity and well-being.
- **Extrovert:** A person who thrives on external stimulation and gains energy from social interactions.
- **FANN:** Will you create a FANN out of your meeting participants?
  - **Feedback:** There is scheduled time for feedback and input from participants.
  - **Action** steps are clearly documented with who will do what by when.
  - **Notes** are taken by someone other than the facilitator to capture decisions, actions, and parking lot items.
  - **Now what?** Will there be another meeting? Will follow-up collaboration be on Teams? What are the next steps?
- **Fierce Curiosity:** An intense desire to learn, understand, and explore new ideas or experiences.
- **Flow (State):** A mental state of deep focus and immersion in an activity, often leading to peak performance.
- **Frozen Evaluation:** A fixed judgment or assessment that remains unchanged despite new information or perspectives.
- **Growth Versus Fixed Mindset:** A concept describing the belief in the ability to develop abilities and intelligence (growth) versus the belief that these traits are static and unchangeable (fixed).

# GLOSSARY

- **Hindsight Bias:** The tendency to see events as predictable after they've occurred, even if they weren't.
- **Human (Soft) Skills:** Non-technical skills like communication, empathy, and adaptability that enhance workplace effectiveness.
- **Individual Development Plan:** A personalized plan for setting and achieving professional growth goals. IDPs often accompany annual performance reviews.
- **Initiatives Mapping:** Organizing and aligning projects or activities to strategic goals and resources.
- **Inner Critic/Saboteur:** The internal voice that criticizes or undermines one's confidence and abilities.
- **Interpersonal Activities:** Actions focused on building and maintaining relationships with others.
- **Intrapersonal Activities:** Self-reflective practices that develop self-awareness, emotional regulation, and personal growth.
- **Introvert:** A person who tends to focus inward, recharges through solitude, and prefers deep, meaningful interactions over large social gatherings.
- **Key Performance Indicators (KPIs):** Quantifiable measures used to evaluate success in achieving goals.
- **Ladder of Accountability:** A framework illustrating levels of personal responsibility, from denial to full ownership of actions and outcomes.
- **Leadership Agility:** The ability of a leader to quickly adapt to situations or people, respond to changes, and lead dynamically.
- **Leadership Philosophy:** A set of beliefs and principles that guide a leader's actions, decisions, and interactions, which often answer: What are my values? How do I operate best? What are my expectations?
- **Level 5 Leaders:** This concept comes from the leadership model developed by Jim Collins where Level 4 leaders are considered highly effective at achieving results, while Level 5 leaders go beyond that by actively developing other leaders and building a sustainable organization for the future—essentially, “teaching” others how to achieve at a high level.
- **Lift the Lid Off:** To remove limitations or barriers, allowing for greater potential or performance.
- **Loaded Language:** Words or phrases with strong emotional implications used to influence an audience's perception.
- **Meaning-Making Machines:** A term suggesting that humans inherently create meaning from experiences and information.

# GLOSSARY

- **Mentoring:** A professional relationship where an experienced person guides and supports another in their development. Advice giving is a common part of mentorship, whereas question asking is a common part of coaching.
- **Microlearning:** An educational approach that delivers content in small, specific bursts for easy comprehension and retention.
- **Microstress:** Small, often unnoticed stressors that accumulate and impact an individual's well-being over time.
- **Mind Map:** A visual diagram used to organize information, showing relationships among pieces of a whole.
- **Mindfulness:** A practice of being fully present and aware of the current moment without judgment.
- **Mindset:** A set of beliefs or attitudes that shape how one approaches people, situations, challenges, and opportunities.
- **Multi-Passionate:** A person with varied interests and talents who pursues multiple passions or experiences simultaneously.
- **Myers-Briggs Type Indicator (MBTI):** A personality assessment based on preferences in how people perceive the world and make decisions.
- **Optimism Bias:** The tendency to overestimate positive outcomes and underestimate risks.
- **Organizational Culture:** The values, behaviors, and shared practices that define an organization's environment.
- **Parkinson's Law:** The adage that work expands to fill the time available for its completion.
- **PASS:** Will your meeting PASS as a good use of time?
  - **Purpose** of the meeting is clearly stated in the agenda (to inform, to decide, to brainstorm, etc.).
  - **Appropriate:** Is a meeting the best way to accomplish your goal? (Collaborate on a document with Teams, inform with an email.)
  - **Short:** Can you accomplish your goal in 45 minutes or less? Can you shorten the meeting by providing documents to review in advance? You will always use the time scheduled. Practice more efficient meetings by scheduling less time.
  - **Selective:** Everyone invited has a clear reason/ purpose for attending (to vote, give feedback, etc.). Post the meeting notes to the intranet and email a link to inform.

# GLOSSARY

- **Peace Corps:** A US volunteer program promoting global development and cultural exchange.
- **Performance Evaluation:** A formal assessment of an employee's work performance, often used for feedback and development.
- **PESTLE Analysis:** A strategic tool used to identify and analyze the Political, Economic, Social, Technological, Legal, and Environmental factors affecting an organization.
- **Pilot:** A preliminary, small-scale implementation used to test and evaluate a concept before wider adoption.
- **Pomodoro Technique:** A time management method using 25-minute focused work sessions followed by short breaks to achieve optimal efficiency and focus.
- **Possibility Thinking:** An optimistic mindset that focuses on potential opportunities and solutions rather than limitations.
- **Post-Traumatic Growth:** Positive psychological changes experienced after overcoming adversity.
- **Predictive Index:** A behavioral assessment tool used to optimize team dynamics and hiring.
- **Principled Negotiation:** A negotiation strategy that emphasizes mutual interests and fair standards to achieve win-win outcomes.
- **Psychological Safety:** A workplace environment where individuals feel safe to take risks and express themselves without fear of negative consequences.
- **Pushback:** Resistance or opposition in response to a proposal, action, or change.
- **RACI (responsible, accountable, consulted, informed):** A matrix used to clarify roles and responsibilities in project management.
- **Rational Emotive Behavior Therapy (REBT):** A therapeutic approach that identifies and changes irrational beliefs to improve emotional well-being.
- **Red Teaming:** A strategy involving challenging assumptions, acting as devil's advocate, and uncovering potential roadblocks or weaknesses prior to execution in order to improve decision-making and outcomes.
- **Relational Poverty:** A state where individuals lack meaningful social connections or a sense of belonging to a community.
- **Retool:** To reorganize or adapt with new tools or methods, often to improve efficiency or effectiveness.
- **Return on Investment (ROI):** A measure of the financial or strategic benefits gained from an investment.

# GLOSSARY

- **Reverse Mentorship:** A learning relationship where a less experienced individual mentors a more experienced person, often to provide insights on new technologies or trends.
- **Rondoval:** Circular homes commonly found in traditional African hut designs, especially in southern Africa.
- **Scarcity Mindset:** A focus on limitations and lack, which can hinder creativity and decision-making. Opposite of abundance mindset.
- **Siloed:** A situation where departments or groups within an organization do not share information or collaborate effectively.
- **SMART Goals:** Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound.
- **Sphere of Influence:** The area or domain where an individual or organization has the power to affect events and outcomes. The three areas include: Within my control, within my influence, and out of my control and influence/everything else.
- **Stakeholders:** Individuals or groups with an interest or concern in a business or project, including employees, customers, investors, and the community.
- **Story Bank:** A collection of personal or organizational stories that can be drawn upon to share and inspire when relevant.
- **Strategic Planning:** A process of defining goals, strategies, and actions to achieve long-term objectives. Strategic planning allows teams to examine and create priorities and therefore row in the same direction.
- **Sunflower Effect:** The tendency to give excessive attention or deference to those in power, often at the expense of diverse perspectives.
- **SWOT Analysis:** A strategic planning tool used to identify an organization's Strengths, Weaknesses, Opportunities, and Threats.
- **The Abilene Paradox:** A group decision-making issue where individuals agree to a course of action that none of them truly support.
- **The Bandwagon Effect:** The tendency to adopt beliefs or behaviors because others are doing so.
- **The Ostrich Effect:** Avoiding negative information or problems by ignoring them, like an ostrich burying its head in the sand.
- **The Story We Tell Ourselves:** The internal narrative we create to explain experiences, shaping our beliefs, behaviors, and emotional responses. The concept, popularized by Brené Brown, encourages us to question our stories for validity.

# GLOSSARY

- **Theme of the Quarter:** A guiding focus or priority set for a three-month period to align efforts and goals within a team or organization.
- **Tiny Tweaks:** Small, incremental changes or adjustments made to improve processes, behaviors, or outcomes over time.
- **Transformational Leadership:** A leadership style focused on inspiring and motivating others to create significant positive change by aligning with shared values and vision.
- **Triple Bottom Line:** A sustainability framework that evaluates an organization's success based on social, environmental, and financial performance (people, planet, profit).
- **True Colors:** A personality framework categorizing traits into four colors (Blue, Green, Gold, Orange) to improve self-awareness and communication.
- **VARK Learning Styles:** A model identifying four learning preferences: Visual, Auditory, Reading/Writing, and Kinesthetic.
- **VIA Character Strengths:** A framework of twenty-four positive traits that help individuals understand and leverage their strengths.
- **VUCA (volatility, uncertainty, complexity, and ambiguity):** A framework for understanding and managing challenging, unpredictable environments characterized by rapid change.
- **We Mentality (negative):** A mindset devoid of personal accountability, such as "We should do that" but no one takes ownership to move things forward.
- **Work-Life Balance:** The equilibrium between personal life and professional responsibilities and the attempt to harmonize them. Often work-life integration is preferred terminology.
- **Wound Bonding:** Forming connections based on the sharing of negative experiences.
- **Yessable Solutions:** Proposals or ideas presented in a way that makes them easy for others to agree to and implement.

# **THE LANCASTER LEADERSHIP ROLLING-OUT-CHANGE CHECKLIST**

To accomplish a successful change initiative, be strategic and optimistically steadfast. Your presence, confidence, and communication are critical to success.

- ☐ Before you roll it out, think through as many details, obstacles, and options as possible.
- ☐ One of the greatest change initiative frustrations for employees is when the leadership changes direction often during the process due to lack of strategic planning.
- ☐ Check your personal feelings about the change initiative. If you are not on board yet and you are the messenger (not a decision maker), figure out some way to commit to the change before you address your team.
- ☐ Discrediting the leadership (i.e., "I don't know why they are making us do this") will degrade morale and trust.
- ☐ If possible, seek input early about the implementation of the change initiative from those it will affect before the plan is solidified. Brainstorm possibilities together.
- ☐ During this entire process, face time is exponentially better than email.
- ☐ Do both: have a guiding plan and be flexible along the way.
- ☐ Be honest. Hidden agendas and lack of authenticity will destroy morale.
- ☐ Use incentives to reinforce change but not demand it.
- ☐ Share the benefits of the change to the organization, their department, and to the individuals.
- ☐ Focus on the why.
- ☐ Communicate the pain/problems of not changing now.
- ☐ Connect and communicate the need for this change to the values and vision of the organization and the individuals.
- ☐ Communicate frequently as appropriate to your situation.



# **THE LANCASTER LEADERSHIP ROLLING-OUT-CHANGE CHECKLIST**

- ☐ When asked, most employees want more information compared to less.
- ☐ Remember that there are multiple stages of change/transition, and many people will not be on board right away.
- ☐ Allow the change recipients to ask questions, share their concerns, and communicate with you. Listen, be patient, and validate the perceived challenge, as opposed to dismissing it.
- ☐ Once the change initiative is solidified and communicated, allow as much autonomy in the how of reaching the change goals.
- ☐ Create smaller goals along the way toward the larger goal.
- ☐ Celebrate successes and milestones met.
- ☐ Recognize individuals who are accepting (or excelling with) the change and find ways for them to mentor others.
- ☐ Continuously seek feedback and input about the impact of the change initiative along the way. At times, you may think, *Suck it up! At least you have a job!* Instead, empathetically listen. The more you understand the concerns, the better you will be able to move forward.
- ☐ Communicate about any feedback that is being implemented.
- ☐ If you sense a lack of confidence or fear, optimistically communicate your self-belief in them.
- ☐ Support success with technical trainings and resources that will ease the transition.
- ☐ Share what is not changing.

# **THE LANCASTER LEADERSHIP ROLLING-OUT-CHANGE CHECKLIST**

The following are questions to ask your team:

1. What do you see as the purpose of the current change effort?
2. Describe your level of confidence in our ability to successfully implement this change.
3. Do you trust that this change is for the better of the organization? How?
4. How is this change affecting you personally? Professionally?
5. What do you think needs to be communicated right now about this change?

## **Resources utilized to create this checklist:**

- Bridges, William, and Susan Bridges. *Managing Transitions: Making the Most of Change*. Hodder & Stoughton, 2017.
- Collins, Jim. *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*. Harper Collins, 2010.
- Grenny, Joseph, Kerry Patterson, David Maxfield, Ron McMillan, and Al Switzler. *Influencer: The New Science of Leading Change*. Vital Smarts, LLC, 2014.
- Kotter, John. *Leading Change*. Harvard Business Review Press, 2012.
- Nohria, Nitin, and Michael Beer. "Cracking the Code of Change." *Harvard Business Review*. May–June 2000. <https://hbr.org/2000/05/cracking-the-code-of-change>.
- Feedback from participants of Lancaster Leadership's Leadership Academies.

# AUTHENTIC LEADER ASSESSMENT

## Instructions

This assessment addresses the 6 qualities for authentic leadership. After working with 75,000 clients, we have utilized our practical research to craft this comprehensive model needed for today's leader. Excelling in these qualities, couched in commitment to Behavior change, Organizational culture, and Sphere of Influence (BOS model), allows for well-rounded authentic leadership. Answer the below questions with the 10-point scale and choose the rating you agree with most for each question. Calculate your total score.

## Scale

- |                 |                  |
|-----------------|------------------|
| 1. Never        | 6. Frequently    |
| 2. Rarely       | 7. Regularly     |
| 3. Occasionally | 8. Consistently  |
| 4. Sometimes    | 9. Almost Always |
| 5. Often        | 10. Always       |

1. I always put time and energy into reflecting & learning about myself in order to grow: my strengths, growth areas, triggers, motivations, and values.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

2. I actively seek feedback and input from others and put relevant learnings into practice.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

3. I am a skilled decision maker, clearly focusing on the details & the big picture, and consider the short-term & long-range impact regarding my attitudes, decisions, and behaviors.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

4. I am perpetually curious in a non-judgmental way; I seek to understand all perspectives, ways of being that are different from myself, new knowledge to implement and I support others' learning & growth.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

# AUTHENTIC LEADER ASSESSMENT

5. I put more effort and care than most into morale, rapport & team building efforts, recognizing others, and celebrating contribution; I effectively communicate through all channels: face-to-face, video/phone, email, etc.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

6. I have exemplary behavior and engagement in situations that call on advanced people skills like negotiation, giving feedback, strategic listening, difficult conversations, de-escalation and non-defensive communication.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

7. I operate with extreme ownership and accountability, am grateful for my opportunities, and demonstrate that my role is to serve my team and those who depend on me.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

8. Daily, I lead proactively with systems, making sure to follow thought out change-management strategies & create a culture that promotes risk-taking.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

9. I lead with transparency, seek opportunities to share vulnerability stories, apologize easily, and empathize with the challenges others face.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

10. With every decision I make, I am taking action through the lens of justice, equity, diversity, inclusion and do my best to evaluate any bias I may hold.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

11. My moral compass guides my actions even if my ideas are unpopular, I lead with ethics, and I am clear about how to live my values at all times.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

# AUTHENTIC LEADER ASSESSMENT

12. I enthusiastically care for my colleagues, assume positive intent, consistently work to build trust and extinguish gossip.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

13. I am proud of who I am and am comfortable telling stories or presenting, as well as influencing others, whether it's in a one-on-one conversation, leading a meeting, or speaking to hundreds of people, and believe that I make a positive impact on the world.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

14. I always pay attention and trust my ability to operate with agility, read the situation & respond appropriately, adapting to lead and follow as necessary, and create or reinvent regularly.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

15.Regardless of what's happening, I operate with resilience, healthy boundaries, tested stress-management behaviors that work for me, create joy and recognize my own thinking traps when they occur.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

16. I operate from a clearly stated mission, weekly, monthly or quarterly priorities, and craft a guiding vision that is understood & valued by my team.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

17. I operate daily with passion, unwavering motivation for the tasks and the "why," and model what true engagement looks like.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

18. I turn vision into action, efficiently accomplish goals, and set needs-based priorities while getting the right work done.

Never	Rarely	Occasionally	Sometimes	Often	Frequently	Regularly	Consistently	Almost Always	Always
1	2	3	4	5	6	7	8	9	10

## Answer Key

### The Six Essential Leadership Qualities for the Authentic Leader

Heart, Achievement, Social Intelligence, Wisdom, Presence, & Fallibility

*Calculate your total score for each area from the questions above and find the corresponding categories.*

#### Heart

(Questions: 10, 11, & 12)

Heart \_\_\_\_\_ Score

- **Belonging (10):** Justice, inclusion, accessibility including hiring, training, accountability.
- Identifying unconscious bias and inclusive communication.
- **Values (11):** Identify values for behavior, making ethical decisions, confronting unethical behaviors, creating a values-based team, team guiding principles (aka ground rules), and leadership philosophy.
- **Trust (12):** Strategies for creating a culture of trust, extinguishing gossip & triangulation, heart based business, and forgiveness.

#### Achievement

(Questions: 16, 17, & 18)

Achievement \_\_\_\_\_ Score

- **Vision (16):** Knowing what you want, creating a shared vision, and team alignment.
- **Engagement (17):** Building engagement for self and others through values and passion. Identifying motivation with the 5 “whys” including: self-determination model to describe the quality of motivation.
- **Action (18):** Action plans, strategic planning, getting buy-in, goal & priority setting, and clear expectations.

#### Social Intelligence

(Questions: 4, 5 & 6)

Social Intelligence \_\_\_\_\_ Score

- **Curiosity (4):** How to coach & teaching how to coach including: validating and paraphrasing, listen, acknowledge, validate, ask open ended questions, and GROW coaching model. Generation & personality differences, and employee development leadership philosophy.
- **Connection (5):** Recognition & celebration, building morale & rapport, and teambuilding. Effective communication including: tone and communication styles, communication assessment, proper use & utilization of communication channels (F2F, phone, video, email, formal document, etc.)
- **Self-Regulation (6):** Negotiation and strategic listening. Courageous conversations & giving corrective feedback including: conflict styles, BEST and non-defensive communication and de-escalation.

## Answer Key

### Wisdom

(Questions: 1, 2 & 3)

Wisdom \_\_\_\_\_ Score

- **Self-insight (1):** Regular self-assessment and reflection. Emotional intelligence: identify triggers & emotional reactions.
- **Perspective (2):** 360 Feedback, performance evaluations, gaining wisdom through mentorship, creating a culture of feedback seeking.
- **Judgment (3):** Discernment and decision-making & succession planning

### Presence

(Questions: 13, 14, & 15)

Presence \_\_\_\_\_ Score

- **Confidence (13):** Public speaking and presenting skills, Influence and storytelling, meeting management, courage, believing in oneself, and positive impact & attitude.
- **Fortitude (14):** Innovation & creativity & work reimagined, optimistic & possibility-thinking, leadership agility, and intuition.
- **Wellbeing (15):** ABCDE method to overcome thinking traps, resilience and stress management and joy and self-care, setting boundaries, energy management, and laughter & humor.

### Fallibility

(Questions: 7, 8, & 9)

Fallibility \_\_\_\_\_ Score

- **Humility (7):** Accountability and ownership for self and others, servant leadership, and gratitude.
- **Design thinking (8):** Strategies for rolling out change (utilizing strategy) including stages of change. Creating a “failing forward” culture.
- **Authenticity (9):** Vulnerability in the workplace, empathy in the workplace & giving grace, and honesty & transparent

## Reflection

There are 60+ leadership concepts embedded in this assessment. List specific strengths & growth areas below.

My Strengths:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

My Growth Areas:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

What are my long-term visions for myself and my work? Think big.

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What are my 3 current biggest obstacles?

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# OUR GROUP OFFERS

- **GROUP COACHING**
  - Combines the benefits of one-on-one coaching with an intimate group experience. Typically done in a virtual (Zoom) environment.
- **STEP ACADEMY: PUBLIC SECTOR**
  - For public sector leaders who want elevate their skills and create a thriving work environment
- **THE ELT ACCELERATOR**
  - 6-month program for a Leadership Team of 6 to 15 members. Comprehensive bite-sized session enhance your leaders through unique combination of expert coaching, practical tools, and research-based frameworks, all with the goal of quality results.
- **LEADERSHIP LEAP PROGRAM**
  - The Leadership Leap Program ensures your newly promoted leaders step into their roles with confidence, clarity, and the skills to succeed.
- **360 ASSESSMENTS**
  - The Extraordinary Leader 360 Assessment aims to give you a well-rounded analysis of 19 competencies, highlighting your leadership strengths and how to be optimally effective.
- **LEADERSHIP ACADEMIES**
  - In our Leadership Academy, participants will build cross-organization collaboration & cohesion, and gain immediately implementable leadership skills.
- **RETREATS & TEAM TRAININGS**
  - We believe personal growth fuels professional success. This isn't another dull training, it's interactive, relevant, and real. We challenge comfort zones, spark behavior change, and invite full participation. Expect connection, laughter, and sometimes even tears.
- **STRATEGIC PLANNING & FACILITATION**
  - Lancaster Leadership's strategic planning service transforms organizational direction through a structured, comprehensive process that aligns leadership teams and stakeholders.