

PRACTICING EXCELLENCE/

LEADING TO ENGAGE PROGRAM WORKBOOK

A DISCUSSION, REFLECTION, & ACTION GUIDE

LEADING TO ENGAGE CERTIFICATION PROGRAM

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LEADING TO ENGAGE CERTIFICATION PROGRAM

WORKBOOK

INTRODUCTION

The vision for the Leading to Engage Program is to develop leaders across physicians, APPs, nursing, and staff teams to advance the engagement of those they lead and to enhance the effectiveness of their leadership approach. The more we know about our own self-tendencies as leaders, the more we can grow as we recognize our strengths and find areas for improvement. Application of the Leading to Engage Program content allows us to further develop as leaders to help garner greater engagement from our teams.

THE PROGRAM:

The program is composed of seven parts. As you journey through each part of the program, this workbook will serve as a resource for reflection, learning, and activation.

DEPLOYMENT:

Leading to Engage skills and tips may be used sequentially, or in the order that offers the most benefit for an individual or team.

THIS WORKBOOK:

Skills and associated tips are featured with a summary and challenge question for your REFLECTION and COMMITMENT to action based on the two areas of self and team.



SELF: What did I learn about myself as a leader?



TEAM: How will I use what I learned to engage my team?

REFLECT on how the content is relevant and helpful to you in discovery and learning about yourself as a leader.

COMMIT to your action as a leader to apply what you have learned for change to encourage engagement.

SUMMARY NOTES AND IMPRESSIONS: Write down what you are thinking. Your thoughts become more tangible when you see them in writing. Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action and application.

A SKILL BUILDER:

At the end of each skill, you will find a skill-building activity to encourage application of the learning content and to serve as a resource for advancing self-awareness and leadership skills. These skill builders help you develop regardless of where you are on your leadership journey.

SUMMARY: The goal of the Leading To Engage Program is to build leaders who deliver, who take action, and who lift others to be their best. Highly effective leaders who are centered on their people are an essential part of a care team engagement strategy. The actions, behaviors, voice, and effectiveness of leaders are foundational drivers of the engagement of teams, the retention of people, and effort of the workforce.

CHALLENGE: Reflect on your past and present leaders. Who is the best leader you have had? What impact did they have on you? What impact did they have on your team?

CHALLENGE QUESTION:

What are examples of actions and behaviors that made the leaders and their teams successful?

REFLECT (SELF):

How is this information relevant to you as a leader? What areas of development do you believe will benefit your leadership the most?

COMMIT (TEAM):

What change can you make or what action can you take to encourage engagement and better position your team for success?

SUMMARY NOTES & IMPRESSIONS:

Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action & application.



SELF:



TEAM:

TIP #2: THE FOUR ELEMENTS OF LEADERSHIP

SUMMARY: This program is about who you want to be and what you want your teams to become. Each of your past leaders have had an influence on your style. Practicing self-awareness will help you understand how your behavior influences others, while using that awareness to grow and learn.

CHALLENGE: Take a look at the leaders around you.

CHALLENGE QUESTION:

Observe leader behaviors and the ways they are able to engage and mobilize others. How do you judge their strengths or weaknesses as a leader?

What effect does the environment have on a leader's ability to lead and engage?

REFLECT (SELF):

What areas of development do you believe you need to focus on to improve your leadership?

COMMIT (TEAM):

What is an action you can take or a change you can make as a leader to encourage engagement?

INTRODUCTION AND FOUR ELEMENTS OF LEADERSHIP

Apply the information you learned from Part 1 to complete the following:

SKILL BUILDER EXERCISES

List the four main elements of leadership and how you model each element.

1. _____
2. _____
3. _____
4. _____

Attributes are things that leaders possess.

Select the attributes you admire in your current and past leaders and do the same for what you consider to be your own leadership attributes.

What are the attributes you most admire in a leader?

- Compassion
- Courtesy
- Self-awareness
- Vision
- Direction
- Fairness

What do you consider to be your own leadership attributes?

- Compassion
- Courtesy
- Self-awareness
- Vision
- Direction
- Fairness

Which ones matched? What attributes are you most proud of? Which ones do you want to work on improving?

SUMMARY NOTES AND IMPRESSIONS: Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: PERSONAL BACKGROUND

Tip #1: What Makes You...You: Our personal background influences our development as leaders. Knowing what makes us who we are is an essential component of effective leadership. Consider these four areas of your human experience beginning with your relationships with your **family**. Your **educational experiences** influence the way you see the world and your perspectives as a leader, and the **successes**. What are the things you are most proud of in your life? Our failures can influence our worldviews and perspectives.

Tip #2: How Background Affects Leadership Style: When we understand ourselves and how our background affects our behaviors, we can grow in our ability to influence our care teams in a more positive way. We can use this information to better understand our leadership style. Similar to connecting successes with your behaviors, we need to also **connect our** failures in the same way. Pay attention to the behaviors that have served you well as a leader, but also the things that you may need to change.

Tip #3: Polishing Your Strengths, Improving Your Weaknesses: Polishing our character requires us to understand our strengths and those areas where we can improve. Self-assessment and engaging in feedback from others are meaningful ways to grow our character and develop as leaders.

Tip #4: What Flourishing Leadership Looks Like: Flourishing as a leader occurs when we consider what we admire in our leaders and determine how to emulate and apply those traits personally and professionally. The actions that you can take to ensure that you are developing your character for success include **asking** your team for feedback about how you're doing as their leader. **Listen** to their feedback after you've asked. Make sure that you spend time listening carefully to the answers and **reflect**. Taking the time to **reflect** on the traits and attributes you have and what you would like to achieve will grow your leadership skills.

Tip #5: Continuous Assessment Required for Mastery: To grow and evolve as a leader means also giving time and effort to areas you need to strengthen and improve. As you assess your character in relation to your strengths and weaknesses as a leader, consider **how** your role changed throughout your career. Think about **what you like to do**, the things that you are good at, and **what you are known for**.

SUMMARY: Our personal background influences our development as leaders. Knowing what makes us who we are is an essential component of effective leadership. Real leaders have a refined sense of self-awareness. Soliciting objective feedback provides direction on strengths and opportunities to improve. Continual self-assessment keeps us moving forward on positive leadership development. **Why** is a question we can't always answer. **WHAT** gives us a focus and an action.

CHALLENGE: Reflecting on your leadership journey, take a look at your life and those people who have been influencers on who you are, how you communicate, interact, and lead.

CHALLENGE QUESTION:

Reflect on the elements of your background, heritage, childhood, education, your beliefs, age, places you've been, positions you've held, and passions you hold. How did these influences shape who you are as a leader?

REFLECT (SELF):

What life influencers do you believe have had the greatest impact on you and your leadership? What is your process for ongoing self-assessment to build self-awareness?

COMMIT (TEAM):

What is an action you can take or a change you can make that will be reflected in your leadership and encourage engagement?

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

Applying the information you learned from Leading to Engage, complete the following:

SKILL BUILDER EXERCISES

From your personal background, describe an influence from each category that makes you...you.

1. Family: _____

2. Education: _____

3. Successes: _____

4. Failures: _____

Self-assess to learn your tendencies.

Do you enjoy the time spent with your team?

- **Yes** – I have hardwired scheduled time to meet with them as a group and one on one. I invite their input on items for the meeting when creating the agenda.
- **Somewhat** – There is a set agenda with a brief built in time for their input and Q&A.
- **Not so much** – I set the agenda in order to control the discussion.
- **Not at all** – Meetings are formal, quick, and virtual if possible.

Why did you choose this answer? _____

There are 5 different behaviors and practices of strong leaders. List an action for how you exemplify these behaviors. For those you may need to work toward, what change do you need to make?

1. Model the way _____

2. Inspire a shared vision _____

3. Challenge the process _____

4. Enable others to act _____

5. Encourage the heart _____

SUMMARY NOTES AND IMPRESSIONS: Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action & application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: CULTURE

Tip #1: Culture Influences Leader Character: In order to lead diverse teams and to treat diverse patients, it first requires a need to understand **WHO WE** are and **HOW WE** relate to and engage with others based on our own background and culture.

Tip #2: Understanding the Culture of Others: As leaders in our clinical communities, regardless of our official titles, it is essential to gain trust from the people we lead. We can start by actively trying to understand their culture, who they are, and how they make our team stronger. Three approaches to understand the culture of those you lead include **incorporating questions** as part of your team meeting agenda, **paying attention** to how people respond to different situations, the occasions they celebrate, and how they interact with others, **and leveraging your influence** to strengthen the team dynamic. Educate and foster partnerships for members and those may not regularly connect with.

Tip #3: Respecting Culture In Interactions: Taking authentic steps towards understanding others' cultures can improve our interactions by knowing the respectful things to say and do toward others. There are ways to use culture to interact with your team more effectively. **Treating each other with respect and care, both professionally and personally**, helps you support your team through the tough challenges. When we treat patients and our teammates with honor and respect and demonstrate a desire to understand their culture and who they are, we send signals of "you matter to me and this team."

Tip #4: How We Act: How our teams perceive, interact, and react to us hinges on our actions, and our behaviors, which can either hinder or promote our connection with others and our ability to lead. There are effective ways to improve how we are perceived so that our actions encourage as opposed to obstructing engagement. **Practice humility.** Humility is the absence of arrogance, and we lead best by curiosity, listening, learning and empowering others. **Incorporate thoughtful language**, verbal and nonverbal, and **ensure there is a system of team checks and balances** to foster each team member's confidence with their place in the group, and trust in others to be objective and respectful when assessing behavior.

Tip #5: Engagement Through Relatedness: As leaders, it is imperative to inspire team engagement through **relatedness** by framing language toward what matters to them, what motivates them, and how to see things from another point of view. There are three things to keep in mind to be effective. **Speak the other person's language.** State your objectives in a way that will matter to them. **Harvest ideas and suggestions** from those you lead. Tapping team ideas is one of the most powerful engagement actions of all. **Creating positive interactions and fostering collegiality** between leaders and followers has a strong impact on motivation, engagement, and well-being.

SUMMARY: It's important to consider how each phase of your life up to this point has influenced your growth as a leader and a person. Awareness of our past influences, both positive and negative, gives us insight into our own leadership. How we lead influences the cultures of our teams. Clarifying your team's common purpose will be the shared vision for the team's character and culture.

CHALLENGE QUESTION:

What are the unique elements of your cultural background that influence your leadership?

REFLECT (SELF):

How do you relate to the culture of the group you currently lead or want to lead and how do you manage any biases you may have?

COMMIT (TEAM):

It takes practice to become a better leader. Using the Leading to Engage Program information on Character and Culture, what is a leader practice you can hardwire to improve your knowledge and understanding of your team's diversity and engagement?

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: CULTURE

SKILL BUILDER EXERCISES

Applying what you learned from the Leading to Engage Program Culture skills and tips, complete the following:

1. Draft your own statement that clarifies what you believe to be your team's common purpose.
2. Direct team members to share what they believe to be the common purpose.
3. Compare and discuss how they are similar and any differences.
4. Clarify and collaborate to create a statement that represents the true vision, goals, and purpose.

Self-assess to learn your tendencies as a leader.

Reflecting on recommended actions on creating a culture of trust based on how leaders act, please select an action or behavior for how your leadership reflects qualities of humility. If you identify an opportunity for improvement in any of these, describe what change you will need to make?

- Admit mistakes and forgive mistakes _____
- Adopt a growth mindset and are open to new ideas _____
- Put the needs of the team first _____
- Model inclusive leadership _____
- Recognize and celebrate employees _____

SUMMARY NOTES & IMPRESSIONS:

Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action & application.

 SELF:

 TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: VALUES

Tip #1: Identifying What We Believe: **Values** guide a leader's action in decision-making. **Reflecting** on what you believe in is important **and** the things in your life that have defined and shaped the way you think about and see the world. **Consider** how you want to be seen as a way to determine **what values guide your actions**.

Tip #2: The Impact of Values: Your values influence what you do as a leader. Values guide decision making. Values **influence interactions and how we treat others**. The **values** by which we live and lead **affect how we communicate**. Every individual is deserving of kindness, respect, appreciation, and recognition for the contribution they make through their role in the process.

Tip #3: Connecting Values To Action: **Connecting values** to leader actions include continual reminders of what your values are. How we treat others reflects our value system. **Congruence of values** is that what we say is evident in what we do, consistently. **Solicit objective feedback** from a trusted friend or colleague to validate that your behavior reflects your values.

Tip #4: Confidence Through Humility: is an essential quality for everyone who leads others. **Humble** leaders **encourage** collaboration, **shared decision-making**, and **empower** others. Leaders who express humility in words and in action **lead with authenticity and sincerity**. This fosters trust, which is a key component of leading teams to better engage.

SUMMARY: The power of values drives who we are, how we communicate, and how others see us. Identify what your values are to know if they are serving as a guide for you. Others seeing your values reflected in who you are builds your standing as a leader. Humility fosters trust.

CHALLENGE QUESTION:

How do your actions and behaviors reflect your values in how you show appreciation and respect for the contributions of others?

PART TWO: VALUES

REFLECT (SELF):

Recall a time when your values caused you to rethink your actions and guided you in making a difficult decision. What were those values?

COMMIT (TEAM):

What is an action you can take or a change you can make that will ensure your values are being reflected in your leadership?

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: VALUES

SKILL BUILDER EXERCISES

Make a list of three to five values that you would like to live by. Use the three questions from the Leading to Engage Character and Values skill tips to help guide your thoughts.

1. What is important to you?

2. How do you see yourself?

3. How do you want others to see you?

Develop a consistent method to serve as a value set reminder. Display this in a place of easy visibility and move often to keep top of mind.

Self-assess to learn your tendencies.

How do you recognize and acknowledge the efforts of your team?

How do you encourage and empower your team to acknowledge and show gratitude to those who contribute and support their work?

PART TWO: VALUES

Think of a leader you respect who exemplifies leading with humility. What behavior earned your respect and what do you hope to emulate with your own leadership? _____

Make a list of those whom you trust to provide objective feedback for you to validate that the values you subscribe to are being reflected in your communication and behavior as an individual and in your leadership. _____

SUMMARY NOTES & IMPRESSIONS:

Use this time and space to record your takeaways, observations, questions, your impressions of the information, how it is helpful to you, and your ideas for action & application.

 SELF:

 TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: MISSION AND VISION

Tip #1: Crafting A Vision & Mission: Creating a **vision** and **activating** your **mission** is essential for effective leadership. Our mission is our reminder of **why** we are here and **who** we **want** to be. Recommendations to help verbalize your mission and vision and provide guidance on how to follow the guide you've set for yourself begins with **taking account of what matters most to you**. Determine **WHAT** you want to achieve and **WHO** do you want to be. **Play to your strengths**. Each of us have strengths and weaknesses in what we do and how we work. **Develop a plan and strategy** that will keep you on the path you set for yourself.

Tip #2: Driving Vision: When you know who you are, you know that you're on the path to achieving your mission and the purpose you serve each day. How we lead people is the greatest driver of their engagement. Recommendations for building your vision include **getting acquainted with yourself** as a reminder for **why you are where you are, doing what you do**. **Make a list of what's changed** since you chose this profession. Consider the differences, similarities, and themes you see between **past-state** and **current-state**. Designing a future state can help guide the actions you will need to drive your own vision, the direction you want to go, and who you want to become.

Tip #3: Defining Your Personal Mission: Your **mission statement** is your philosophy and a way to **express your values** and the things you consider important. The first step in creating a personal mission is **asking questions** that help you define **why** you do **what** you do. **Craft your mission statement** starting with **what you want to achieve** or **who you want to become**.

Tip #4: Valuing People Above All Else: Your **interactions** with others define you as a leader. Recognizing your emotional responses in your conversations, engagements, and encounters helps you show that you honor, listen, and respect every person with whom you interact. Emotional intelligence, and the associated skills and behaviors, are essential for leaders to connect with, **understand, and engage** their teams. This includes finding ways to acknowledge and show appreciation for your team, and being there for your team in a visible, tangible, approachable way is an important expression of people first-leadership.

SUMMARY: Your mission and vision is guided by what matters most to you. An essential part of casting your mission and vision is asking yourself what is important and what do you want to achieve in your professional life. A mission and vision with **character and presence** that **fuels your purpose** and lifts others is essential in the leader development journey.

PART TWO: MISSION & VISION

CHALLENGE QUESTION:

What is your current mission and vision statement and how does it align with your current role in leadership?

REFLECT (SELF):

What matters to you and drives your ambition? Recall the phases and changes that have occurred along your professional journey and how those are reflected in your mission and vision.

COMMIT (TEAM):

What action you can take or a change you can make to ensure that your leadership reflects your mission and vision?

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART TWO: CHARACTER

SKILL: MISSION AND VISION

SKILL BUILDER EXERCISES

Use this step-by-step method to craft your mission statement by using the answers to these questions. Write down a couple of sentences or a paragraph that addresses all the things you want to accomplish.

- **Step 1:** What do you want to accomplish?
- **Step 2:** Determine. . . what are the things in your life you believe are the most important?
- **Step 3:** Consider. . . what are your life's DO THIS and DON'T DO THIS?
- **Step 4:** Decide. . . what are the contributions you want to make?

Self-assess to learn your tendencies.

How do your actions reflect person-first leadership?

How often do you share your organization's mission and vision with your staff?

PART TWO: MISSION & VISION

Reflecting on past and current state, what are some things you know now that you didn't know then?

Make a list:

As you reflect on your past self and your current self, how have the differences changed you as a leader?

GROWTH: _____

KNOWLEDGE: _____

SELF-AWARENESS: _____

SELF-CONFIDENCE: _____

Rate yourself on these common characteristics of emotional intelligence. Use a rating scale of (0-10) with 0 not at all and 10 excellent. Evaluate which emotional intelligence skill do you need to develop or improve and what will be your plan for how to do that?

- Being aware of your own emotions: _____
- Being aware of the emotions, experiences, and perspectives of others: _____
- Knowing how your actions affect others: _____
- Knowing how to manage your response: _____

SUMMARY NOTES & IMPRESSIONS:

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SELF:



TEAM:

PRACTICING EXCELLENCE/

**LEADING TO ENGAGE
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WORKBOOK
PART THREE: PRESENCE**

TABLE OF CONTENTS

LEADING TO ENGAGE CERTIFICATION PROGRAM

Each skill in Part 3 of the Leading to Engage Certification Program will have the following:

- Summary, Challenge, Self-Reflection, and Team Commitment
- Skill-BUILDER Exercises
- Summary Notes and Impressions

Skill: Bearing 04

Skill: Confidence 08

Skill: Gratitude 11

Skill: Leader Resiliency 15



LEADING TO ENGAGE CERTIFICATION PROGRAM WORKBOOK

INTRODUCTION

The vision for the Leading to Engage Certification Program is to develop leaders across physicians, APPs, nursing, and staff teams to advance the engagement of those they lead and to enhance the effectiveness of their leadership approach. The more we know about our own self-tendencies as leaders, the more we can grow as we recognize our strengths and find areas for improvement. Application of the Leading to Engage Certification Program content allows us to further develop as leaders to help garner greater engagement from our teams.

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The program is composed of seven parts. As you journey through each part of the program, this workbook will serve as a resource for reflection, learning, and activation.

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THIS WORKBOOK:

Skills and associated tips are featured with a summary and challenge question for your REFLECTION and COMMITMENT to action, focusing on two areas: self and team.



SELF: What did I learn about myself as a leader?



TEAM: How will I use what I learned to engage my team?

REFLECT on how the content is relevant and helpful to you in discovering and learning about yourself as a leader.

COMMIT to taking action as a leader by applying what you have learned to encourage engagement and drive change.

SUMMARY NOTES AND IMPRESSIONS: Write down what you are thinking. Your thoughts become more tangible when you see them in writing. Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.

A SKILL BUILDER:

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LEADING TO ENGAGE CERTIFICATION PROGRAM

PART THREE: PRESENCE

SKILL: BEARING

Tip #1: How We Want To Be Seen

Bearing is the manner in which leaders carry themselves and how they are seen by others. This tip covers four questions we can ask ourselves as we begin to evaluate our presence.

Tip #2: How We Believe Others See Us

It is critical to assess how others perceive us because it shapes how we are understood and followed by our teams. If our presence is positive, **we can engage our teams**, build trust and confidence, and **influence positive change**. Our words and actions must **reflect our core values** and who we want to be.

Tip #3: Matching Our Bearing With Our Character

How we present ourselves to the world is a reflection of our character as a leader. When **we are authentic and genuine**, and when our presence aligns with our character, **we build trust, inspire others, and empower teams** for the health and well-being of the patients we care for.

Tip #4: Modeling Behavior

Through genuineness, consistency, transparency, accountability, and humility, we can **ensure that our audio matches our video** – a fundamental trait needed by great leaders to engage their teams.

SUMMARY: Bearing is the way leaders carry themselves and how they are seen by others. Bearing can make a big difference in how people perceive us, and in small and big ways, it helps us build trust with our team. Our bearing should mirror our values, beliefs, and character.

CHALLENGE:

Engaging leaders commit to continuous self-improvement to maximize their unique value, understand their strengths and weaknesses, and work on areas they desire to improve. What self-improvement activity will you commit to in order to improve your bearing as a leader?

REFLECT (SELF):

What qualities – emotional, intellectual, physical, spiritual – are you most proud of, that you want others to know about?

COMMIT (TEAM):

What actions can you take to exhibit the qualities you listed with the teams you lead? Brainstorm specific examples.

Leader 360

Part of mastering our bearing is gathering feedback from those who are around to witness our presence. When was the last time you asked your team for feedback on how they feel about you as a leader?

Ask your team to complete a review of your leadership using the Leader 360 approach. Complete the outline below and use it to plan, execute, and evaluate your review.

Step 1: Define And Articulate Your Objectives

What does “great leadership” look like in your organization? You want to make sure everyone evaluates leadership based on the same criteria.

What is the purpose of the 360-degree feedback initiative? You want to clearly articulate what you will do with this feedback and how it will help.

Step 2: Choose Your Questions

What questions will you ask your team? Create or choose feedback questionnaires and criteria that align with the competencies you want to assess. Ensure these are measurable behaviors.

Step 3: Organize And Plan

What methodology will you use for administering feedback?

What is your timeline for sending, receiving, and following up on feedback?

- I will complete writing the survey on: _____
- I will send the survey on: _____
- I will send the survey to: _____
- The due date for completing the survey will be: _____
- My follow-up on action I will take based off of the feedback I receive will look like:

Step 4: Commit And Execute

You have an objective and a plan in place. Now remove any barriers, mental or physical, and commit to taking this step of engaging your team to improve your leadership. Print this plan, hang it on your desk, make yourself an appointment on your calendar – whatever it takes to commit and execute.

Step 5: Follow-Up And Action Steps

What did you learn from your team's feedback? What action steps will you take because of it? How will you communicate this with your team?

*"You are not a leader just because you say you are. **You have to earn it and re-earn it** and re-evaluate it from time to time." – Mark Hertling*

SELF ASSESS

When have you failed to show up in the way you wanted to as a leader?

What do you think triggered this? What can you do to mitigate this in the future?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART THREE: PRESENCE

SKILL: CONFIDENCE

Tip #1: Identifying Confidence

If you want to be a trusted leader, it's important to find the sweet spot between too much and too little confidence, **striking a balance** that inspires your team while remaining **open to feedback and improvement**.

Tip #2: Leader Confidence Contributes To Success

A **confident leader** is one who encourages mitigated risk-taking, inspires actions, fosters trust and rapport, and **faces challenges head-on**.

Tip #3: Confidence In Words

Preparation, a strong personal belief in your abilities, and positive, precise language are the ways in which our **confidence is displayed through our words**.

Tip #4: Confidence In Actions

Confidence in actions is a combination of **comfort with your abilities** while knowing that growth and more confidence come with **reasoned risk-taking**.

Tip #5: Confidence In Manner

Ultimately, **a leader with a confident manner inspires trust**, motivates and empowers others, and continues to learn and develop to raise the team's capacity to create results.

SUMMARY: Confidence is essential for leadership, but both overconfidence and insecurity can hinder a leader’s effectiveness. Striking a balance involves self-awareness, calculated risk-taking, learning from mistakes, and listening to others — leading to stronger team engagement, trust, and success. Leaders must communicate with clarity, project a confident manner without arrogance, and continuously grow to empower their teams and foster a positive environment.

CHALLENGE:

What are you tolerating in your work because it feels out of your control or ignored?

If you could make changes on the things you wrote down, what would you do?

Share your idea with a trusted colleague for feedback. Then ask yourself: Is this achievable? Does it align with the organization’s values or capabilities? If it’s worth pursuing, have the confidence to take action.

REFLECT (SELF):

Leaders must model to their team how to view setbacks as opportunities for growth and learning rather than failures. When was the last time you took ownership of your or your team’s mistakes?

COMMIT (TEAM):

Part of being a confident leader is trusting your team’s abilities and delegating responsibilities, fostering growth and ownership. Make a list of the work you are willing to let go of and assign ownership to empower your team.

Improve your focus, improve your confidence.

Knowing that confidence requires having a deep understanding of your own strengths and weaknesses, take the time to complete the columns. On the left, write down areas where you believe you lack confidence — your weaknesses, insecurities, or areas of improvement. On the right, list areas where you feel very confident, such as skills you know you're good at and examples of successes that happened because of your confidence.

AREAS YOU LACK CONFIDENCE <i>(weaknesses, insecurities, areas of improvement)</i>	AREAS YOU FEEL CONFIDENT <i>(skills, successes, strengths)</i>

How can you leverage the things you wrote down on the right to improve your confidence and delegate or ask for help with the things you wrote on the left to empower your team?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.

 **SELF:** _____

 **TEAM:** _____



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART THREE: PRESENCE

SKILL: GRATITUDE

Tip #1: How Gratitude Contributes To Leadership

Gratitude is the vehicle by which **we inspire a shared purpose**, align individuals' commitment to the collective vision, and foster a sense of dedication and **pride in our work**.

Tip #2: Gratitude And Wellness

We need gratitude to **sustain our emotional, mental, and physical well-being**, and to grow and develop our confidence and resilience. A healthy leader can develop, lead, and engage healthy teams.

Tip #3: Gratitude For Others

In our teams, **gratitude is the stimulant that encourages teams** to keep going, express ideas, take risks, support each other, and engage in the work at hand.

Tip #4: Gratitude For Opportunities

Expressing gratitude for the opportunities we receive is a powerful way to nurture relationships, **demonstrate appreciation**, and honor the support and belief others have shown in us.

Tip #5: Optimism And Hope

Gratitude for others and opportunities ultimately gives us an **optimistic view** and hope for the future.

SUMMARY: Gratitude in leadership offers numerous benefits, such as improved relationships, enhanced well-being, and sustained performance by inspiring commitment, boosting team dynamics, and promoting optimism. Leaders are encouraged to practice gratitude by recognizing contributions, acknowledging opportunities, and nurturing hope, which in turn helps them lead healthier, more engaged teams.

CHALLENGE:

Do you have gratitude moments baked into your leadership routines? If not, establish them. Block out calendar times and set the intention to use 10 minutes a day to become a grateful leader.

REFLECT (SELF):

When you express gratitude, are you remembering to make it timely, genuine, and actionable? Where do you think you have the opportunity to improve the way you give gratitude to your teams?

COMMIT (TEAM):

Over the next few days, weeks, or months commit to sending a text, email, or hand-written note to every one of your direct reports recognizing them for something special they do or contribute.

SKILL BUILDER EXERCISES**Becoming A Grateful Leader**

Circle three gratitude ideas that sound interesting from the list below.

Send a thank you letter to your team member's loved ones

Make a personal phone call

Time block for gratitude

Challenge coins

Gratitude journaling

Volunteer to help others

10-second gratitude framework

Now, of the three you chose, read further into the instructions below and commit to doing at least one with your teams.

Thank you letter to team member's loved ones

The intention of the letter is to show how grateful you are for your team member by instilling pride and gratitude in their family members. Elements of the letter should include what it means to the team, patients, and yourself to have their loved one on your team. Think of specific actions or memorable moments where the team member made a difference, and express gratitude for sharing their loved one with the team. Consider sending this to your team member's spouse, partner, children, or other loved one over the holidays.

Challenge coins

Watch [Tip #3: Gratitude For Others](#) with your team to introduce Challenge Coins. Then, choose your own "Challenge Coin" for your team. Make sure when the "coin" is given, it is meaningful. Consider developing your own game of "being caught without your challenge coin" on your team.

Volunteer to help others

Volunteering your time is a meaningful way to express your gratitude, and asking others to volunteer to do something shows your confidence in their abilities... and it gives them a chance to shine. What could you volunteer to help with today? Who could you tap on your team to volunteer to do something they would love that would also give them the chance to shine?

Make a personal phone call

When is the last time you carved out 10 minutes to call someone up and give them a personal thank you? Commit to making a phone call to recognize someone for the difference they are making. Consider making this a common practice on your commute to and from work or on your morning walk.

Time blocking for gratitude

Block out 10 minutes every day on your calendar to express gratitude towards someone. Use this time to make phone calls, round, write texts, hand-written notes, buy someone a coffee – whatever this looks like. Build it into your daily routine.

Gratitude journaling

Implement a daily gratitude reflection into your day. Every day, write down three things you are grateful for. Consider purchasing a gratitude journal, using a notebook, a Word document, or a notes app on your phone or computer. It doesn't matter what you use, the consistent commitment is the key.

10 second gratitude framework

I am grateful you did _____ because it allowed me to _____ .

This framework is powerful for expressing gratitude. It not only shows your teammates gratitude for what they did, but gives them a sense of purpose because they gave their leader the time and space to do something else.

What would you rate your gratitude practice as a leader on a scale from 1-10 (1 being the lowest rating, 10 being the highest rating)

1 2 3 4 5 6 7 8 9 10

What action steps are you going to take to improve this rating? Share your commitment with at least one fellow leader.

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART THREE: PRESENCE

SKILL: LEADER RESILIENCE

Tip #1: Looking Out For Each Other

Looking out for each other means **fostering an inclusive environment** that values and encourages diverse perspectives, nurtures mutual support and adaptability to grow, and **actively cares about the well-being and development of leader colleagues** and the teams we lead.

Tip #2: Understanding And Care For Self

Practicing gratitude, accepting change, prioritizing relationships, taking care of our mind and body, and learning from our past are all ways that we can **cultivate the resilience we need to lead our teams**.

Tip #3: Leaning On Others

A **strong support network** of “battle buddies,” loved ones, and positive, supportive fellow professionals can significantly contribute to our well-being, resilience, and overall success in our effectiveness as leaders and our ability to engage our teams.

Tip #4: Why Leaders Don't Have The Right To A Bad Day

The role of a leader is to provide a positive and optimistic approach to the future. Leaders need to be mindful of **not exhibiting negativity** that affects others. Your team relies on you to **set the example of calm** and assurance that “everything is going to be okay.”

Tip #5: What To Expect After A Storm

The beginning of every crisis seems to be overwhelming. However, we can **approach these challenges with optimism**, belief, flexibility, and the support of others. If we can do that, we can weather any storm and not only that, **we can grow our resilience** for the next one.

SUMMARY: Resilient leaders thrive by fostering supportive communities, promoting adaptability, and encouraging diverse perspectives to overcome challenges. Building resilience requires self-care, gratitude, and strong connections with others, as well as maintaining a positive mindset and learning from past crises to grow stronger for future challenges.

CHALLENGE:

Print the sign on the following page and hang it in your office to remind yourself to put on an optimistic, confident presence at all times. Because if you as a leader have a bad day, everyone around you is going to have one, too.

REFLECT (SELF):

Think about times in your life where you had to become resilient. What helped you build that resiliency?

COMMIT (TEAM):

Share a story or stories that came to mind in the reflection question you just answered with your team. Then, encourage and support your team to be able to build resiliency in similar ways.

SKILL BUILDER EXERCISES

Battle Buddy

An important takeaway from this skill is that the leader needs to provide positivity to their teams. However, as leaders, we don't always feel positive and need a safe space to share those emotions too. A strong support network of "battle buddies," loved ones, and positive, supportive fellow professionals can significantly contribute to our well-being, resilience, and overall success in our effectiveness as leaders and our ability to engage our teams.

Identify your battle buddy: _____

Meet with them and let them know how much they have helped you in times you needed it most and offer to do the same for them. How can you develop a consistent cadence to check in with them?

LEADERS DON'T HAVE THE RIGHT TO A BAD DAY

PRACTICING / EXCELLENCE /

PRACTICING EXCELLENCE/

**LEADING TO ENGAGE
CERTIFICATION PROGRAM
WORKBOOK
PART FOUR: INTELLECT**

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LEADING TO ENGAGE CERTIFICATION PROGRAM

Each skill in Part 4 of the Leading to Engage Certification Program will have the following:

- Summary, Challenge, Self-Reflection, and Team Commitment
- Skill-BUILDER Exercises
- Summary Notes and Impressions

Skill: Mental Agility 04

Skill: Sound Judgment 07

Skill: Tapping Team Intelligence 10

Skill: Interpersonal Tact 14



LEADING TO ENGAGE CERTIFICATION PROGRAM WORKBOOK

INTRODUCTION

The vision for the Leading to Engage Certification Program is to develop leaders across physicians, APPs, nursing, and staff teams to advance the engagement of those they lead and to enhance the effectiveness of their leadership approach. The more we know about our own self-tendencies as leaders, the more we can grow as we recognize our strengths and find areas for improvement. Application of the Leading to Engage Certification Program content allows us to further develop as leaders to help garner greater engagement from our teams.

THE PROGRAM:

The program is composed of seven parts. As you journey through each part of the program, this workbook will serve as a resource for reflection, learning, and activation.

DEPLOYMENT:

Leading to Engage skills and tips may be used sequentially, or in the order that offers the most benefit for an individual or team.

THIS WORKBOOK:

Skills and associated tips are featured with a summary and challenge question for your REFLECTION and COMMITMENT to action, focusing on two areas: self and team.



SELF: What did I learn about myself as a leader?



TEAM: How will I use what I learned to engage my team?

REFLECT on how the content is relevant and helpful to you in discovering and learning about yourself as a leader.

COMMIT to taking action as a leader by applying what you have learned to encourage engagement and drive change.

SUMMARY NOTES AND IMPRESSIONS: Write down what you are thinking. Your thoughts become more tangible when you see them in writing. Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.

A SKILL BUILDER:

At the end of each skill, you will find a skill-building activity to encourage application of the learning content and to serve as a resource for advancing self-awareness and leadership skills. These skill builders help you develop regardless of where you are on your leadership journey.



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FOUR: INTELLECT

SKILL: MENTAL AGILITY

Tip #1: Defining Competence

Leaders know they must **continuously exhibit their competence** – their expertise – to gain trust. But it's also critical to **grow and develop that competence in others**.

Tip #2: Understanding And Framing Challenging Problems

Framing is **analyzing and communicating** the toughest of problems in the **simplest of ways**. Learn the 3 key elements of this problem-solving method.

Tip #3: Processing Short And Long-Term Solutions

When **leaders use mental agility**, they can triage challenges into immediate and long-term categories, allocating time and resources to solve urgent challenges while **developing and delegating solutions** to longer term needs.

Tip #4: Right Decisions in Complex Circumstances

Leaders must adapt their decision-making based on conditions of certainty, uncertainty, and risk, leveraging available information, resources, and team input to make the best possible choices within those circumstances.

SUMMARY: Leadership requires continuously growing and demonstrating expertise, sharing knowledge to build team competence, and using mental agility to solve problems and make informed decisions under different conditions.

CHALLENGE:

Empowering teams to bring ideas and solutions to the table is a powerful engagement strategy. Ask your team for ideas on a common challenge they face in the next huddle. Then, empower them to try the ideas the group likes best and take ownership of its success.

REFLECT (SELF):

What is something I feel strong competence and confidence in as a leader?

COMMIT (TEAM):

How can I help my team grow in competence and confidence? Here are three ways to consider: sharing knowledge, encouraging problem solving, and fostering and supporting a growth mindset. What will you commit to?

Shark Tank

In Tip #2, we talked about how senior leaders have only so much time and energy, and they can't possibly fix everything that is wrong in their organization. But as leaders, we can help our bosses by framing a problem, providing some intellectual energy, and collaborating as to how the problem might be fixed.

Challenge your team – whether it's your direct reports or your fellow leadership team – to a simple “Shark Tank” challenge.

The ask is simple: Identify an issue that you think could be fixed in your organization. Pull together a few people that share your feelings, and instead coming with a “someone else should fix this” mindset, roll up your collective sleeves and collaborate on ideas that you would recommend to fix or improve the problem. Share it with your leadership above you—they might even have some of the same thoughts—and see where it goes.

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



PRACTICING EXCELLENCE

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FOUR: INTELLECT

SKILL: SOUND JUDGMENT

Tip #1: Assessing Situations

Being able to **“wander around” as a leader** will expose you to some realities and really unique things. These will only improve your assessment of progress, identification of needs, and ideas to improve to **help your team move forward**.

Tip #2: Gathering Information Versus Fighting For Intelligence

The leader's ability to **find, aggregate, and leverage information** is an asset that will continue to make an impact. Great leaders know they can either wait for that information or fight for intelligence that provides the information that **helps in decision-making**.

Tip #3: When To Take The Hill And When To Fight Another Day

Leaders must ask themselves if decisions are worth continuing to **fight for right now**, or **wait until the timing is better** on another day. This tip covers three go-to questions.

SUMMARY: Actions of sound judgment include assessing situations through leadership by wandering around, actively fighting for intelligence rather than passively gathering information, and knowing when to pursue an objective versus when to wait for a better opportunity.

CHALLENGE:
Adopt a mindset of curiosity as you interact with your teams. Instead of jumping to conclusions or acting on assumptions, first ask questions to make sure you fully understand the breadth of the situation.

REFLECT (SELF):
What do you consider your approach when it comes to gathering, analyzing, and acting on information?

PROACTIVE

REACTIVE

COMMIT (TEAM):
If you said reactive to the self-reflection question, what's one step you can take to build a more proactive approach? If you said proactive, what's one way you can integrate this into your team culture so your direct reports and colleagues can start to be more proactive as well?

Leadership By Wandering Around (LBWA) Walk

Put a block on your schedule every single week to do a Leadership By Wandering Around (LBWA) walk. Being able to “wander around” as a leader will expose you to some realities and really unique things. These will only improve your assessment of progress, identification of needs, and ideas to improve to help your team move forward.

The key when you’re assessing situations is to first determine where you are, and then determine what you’re doing. To prepare and follow up, answer the following questions:

1. What are you looking for? What do you hope to find?

2. What did you actually see? Compare the differences in what you saw versus what you expected to see, both good and bad in the space below:

What I saw that I want to stay the same	What I saw that I want to be different

3. How will I communicate my observations with my team in a way that is curious, calm, and empowering?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.

 **SELF:** _____

 **TEAM:** _____



LEADING TO ENGAGE CERTIFICATION PROGRAM PART FOUR: INTELLECT

SKILL: TAPPING TEAM INTELLIGENCE

Tip #1: All Smarter Than One

By **tapping into the intelligence of others** in the group, leaders are able to mold their team's thoughts into action-oriented goals that will fortify the way **each member is heard and valued**.

Tip #2: Creating Psychological Safety

Leaders hold the tools and power to lay the foundation of psychological safety. By asking open-ended questions, listening to others before giving your own thoughts, speaking up when unhelpful or hurtful commentary is made, and asking for feedback, you can **create a psychologically safe environment**.

Tip #3: Tapping Into The Ideas Of Others

Leaders need to **create scenarios conducive to idea generation**, which include advancing safety to contribute, building places to exchange innovations, harvesting ideas, and recognizing individual contributions. Doing this will **expand the intelligence, engagement, and innovation of our teams**.

Tip #4: Spreading Good Ideas

Spreading good ideas matters because it **spreads the good habits needed to evolve** your teams and organizations.

SUMMARY: Tapping into team intelligence by fostering collaboration, psychological safety, and encouraging idea-sharing across all levels is pivotal. Involve your teams in problem-solving, promote open communication, and spread innovative ideas for better engagement and effectiveness.

CHALLENGE:

Start integrating this question into your team meetings/huddles weekly:

What is something you want fixed that's not getting enough attention from me?

Based off of the level of psychological safety on your team, you may get no answers at first. Keep trying and see how the question starts to transform the conversation.

REFLECT (SELF):

How would you rate the level of psychological safety on your team on a scale of 1 – 10? (1 being the least psychologically safe and 10 being the most psychologically safe possible)

1 2 3 4 5 6 7 8 9 10

COMMIT (TEAM):

Ask your team to rate the level of psychological safety they experience being on your team. You can do this by asking them for a 1-10 rating or by asking them a series of questions. Consider doing this anonymously via a survey or by printing out a sheet in the form of a checkbox, having them fill it out, and return it in a box so that people feel comfortable voicing their true opinions. We have provided you with the questions in the checkbox form to help get you started.

1. Do you feel it's safe to take risks and express your opinions or concerns within the team?

☐ YES ☐ NO I'd feel safer if: _____

2. Do you feel comfortable asking for help or admitting mistakes without fear of negative consequences?

☐ YES ☐ NO I'd feel more comfortable if: _____

3. Do you believe your contributions are valued, and do you feel respected by your team members?

☐ YES ☐ NO I'd feel more valued and respected if: _____

Socratic Method

The basic principle of the Socratic method, applied to leadership, is to never tell your team something that you can ask them. Leaders of high-performing teams seek to not give them the answers, but instead ask the questions that will help them find the solution.

Here is a helpful list of “Socratic Questions” you can start practicing with your team. Print out this list and have it ready on your desk as you prepare for leading team meetings, huddles, or 1:1 conversations.

SOCRATIC QUESTIONS

CLARIFYING THINKING AND UNDERSTANDING:

- What is the problem we are trying to solve?
- Can you give me an example?
- What do we already know about this?

PROBING ASSUMPTIONS:

- What would happen if...?
- Is that always the case?
- What could we assume instead?

EXAMINING EVIDENCE AND RATIONALE:

- What do you think is the best approach?
- What evidence is there that supports or refutes?

CONSIDERING ALTERNATIVE PERSPECTIVES:

- Are there any alternatives?
- What is the other side of the argument?
- Who would be affected and what would they think?

CONSIDERING IMPLICATIONS AND CONSEQUENCES:

- What would be the consequence of...?
- What if you are wrong?
- If we say yes to this, what are we saying no to?

QUESTIONS ABOUT THE QUESTION?

- Are there any other questions we need to ask?
- Why is this such an important issue?

Dream Session

Facilitate a “dream session” with your team. Carve out 10-20 minutes in a team meeting for your team to write down their dreams for next year, ignoring any perceived constraints or lack of resources.

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FOUR: INTELLECT

SKILL: INTERPERSONAL TACT

Tip #1: Understanding Others' Perspectives

Interpersonal tact is understanding others' perspectives, what they're going through, and what they care about. It requires **holding yourself accountable for your actions** and it involves humility and an understanding of the situations we find ourselves in.

Tip #2: Combining Respect and Civility

Using **honesty, respect, and civility** for those we lead will yield the same results in the healthcare industry: **improved performance**, better retention, greater interprofessional teamwork, and higher engagement.

Tip #3: The Art Of Level-Headedness

We can all become a master at the art of level-headedness by combining our leadership style with level-headed leader tactics in a way that will **spread respect, confidence, and trust** throughout our teams.

SUMMARY: There is need for understanding others’ perspectives and demonstrating respect and civility in communication. By modeling active listening and thoughtful communication, leaders can foster an environment of mutual respect, which enhances team performance and engagement, even in challenging situations.

CHALLENGE:

Practicing using “I” and “we” phrases instead of “you.” Notice how the tiny communication alteration can transform interpersonal communication to create an environment of mutual respect, yet still be effective. Here are some examples to get you started:

“You” Statement: *“You forgot to send the paperwork to complete the deadline last week.”*

“We” and “I” Statement: *“We forgot to send the paperwork to complete the deadline last week”*

“You” Statement: *“You didn’t stock the crash cart last week.”*

“We” and “I” Statement: *“I forgot to remind you to stock the crash cart last week.”*

REFLECT (SELF):

Take three seconds to think about the person you see as the Ultimate Leader. Who came to mind?

COMMIT (TEAM):

Take some time to answer the following questions. Then, act on the momentum of this practice by taking action in your next interaction with someone on your team.

What can you do to show respect for your team?

How can you hold high standards and instill a belief in your team that they can achieve them?

What can you do to sincerely show interest in your team’s development?

Level-Headed Leadership Tactics

Review the five tactics to practice when becoming a more level-headed leader listed below:

1. Staying consistent with your words and actions, regardless of your mood.
2. Practicing curiosity and exploring others' viewpoints more often.
3. Knowing how and when to give effective feedback.
4. Looking for solutions instead of dwelling on problems.
5. Continually striving for better understanding, more knowledge, and greater self-awareness.

Which one are you the best at? _____

Which one is the greatest opportunity? _____

When becoming the leader you want to be, using the 5 tactics, where will you dedicate your time and what will that look like in practice?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:

PRACTICING EXCELLENCE/

**LEADING TO ENGAGE
CERTIFICATION PROGRAM
WORKBOOK
PART FIVE: LEAD**

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LEADING TO ENGAGE CERTIFICATION PROGRAM

Each skill in Part 5 of the Leading to Engage Certification Program will have the following:

- Summary, Challenge, Self-Reflection, and Team Commitment
- Skill-Builder Exercises
- Summary Notes and Impressions

Skill: Build Trust	04
Skill: Modeling	08
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LEADING TO ENGAGE CERTIFICATION PROGRAM WORKBOOK

INTRODUCTION

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REFLECT on how the content is relevant and helpful to you in discovering and learning about yourself as a leader.

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LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FIVE: LEAD

SKILL: BUILD TRUST

Tip #1: Trust Defined

Trust is and should be the basis for all leadership actions. **Teammates become more able to trust their leaders when they know the truth** about who they are, what they do, and why they do it.

Tip #2: Being Trustworthy

Who leaders are, what they do, and the ways they interact with and influence others all present **opportunities for leaders to position themselves as trustworthy.**

Tip #3: Team Engagement Through Trusting Others

For teams to **share mutual trust**, leaders shouldn't underestimate the importance of **trusting the people they lead.**

Tip #4: Exhibiting Trust

Leaders can exhibit trust with their teams by **sharing responsibility**, communicating clearly about expectations, and nurturing trust through training, counseling, coaching, and **influencing teams toward continued development.**

Tip #5: Actions That Fuel Trust

Leaders can help their teams trust them by taking actions that **demonstrate trustworthiness**, such as standing up for what's right, being honest, and treating people fairly.

Tip #6: Regaining Trust

Trust is built on both big and small actions. It's also lost through both big and small mistakes. **Learning from mistakes** is one of the true traits of a great leader.

SUMMARY: Leaders must earn trust through consistent actions and character, while also empowering their team members to build mutual trust, resulting in better collaboration and engagement.

CHALLENGE:

Which of the 5 actions below are you going to commit to working on this week to help you win the trust of those you work with? (*circle one*)

1. Demonstrating a strong set of values
2. Being honest and transparent
3. Communicating with a calm and collected demeanor
4. Helping others grow
5. Demonstrating a consistent track record

What does that commitment look like? What actions will you take?

REFLECT (SELF):

What makes you a trustworthy leader?

COMMIT (TEAM):

Trust is built in drops but lost in buckets. Ask your team what **you** can do as a leader that will earn their trust or break their trust. Send this out as a survey so they can fill it out anonymously. Then, follow-up using the actions below:

FOLLOW UP:

1. Share what you learned from their responses with them.
2. Let your team know what actions will earn or break **your** trust.
3. Ask, "What can I do to re-earn your trust?"

Trust Through Leadership

Evaluate yourself on the following leadership competencies by giving yourself a rating of 1-5. (1 being needs improvement and 5 being no improvement necessary)

Leadership Competencies	Rating
How well do I communicate?	
How well do I help others develop and improve?	
How well do I create a fostering and cohesive team environment?	
How well do I resolve conflicts?	
How well do I lead – and manage – actions to accomplish tasks and objectives?	

If you rated yourself a 2 or lower in any of the competencies, commit to an improvement action. Here are some ideas to get you started:

COMMUNICATION: One of the ways leaders can improve communication is by being clear about their expectations. Specifying your standards will help your teammates conceptualize the benchmark they're reaching for when working to earn your trust.

Identify a recurring communication breakdown or point of contention you are feeling. Communicate the expectations with your team.

DEVELOPMENT: You can nurture trust in someone by making time for training, counseling, and coaching them toward continued development.

In preparation for your next goal setting 1:1 with your team, ask them to come with suggestions for their own development. Come with your own ideas as well and together, form a development plan.

TEAM BUILDING: Help your team foster trust between each other by bringing them together to interact at a dedicated time. Even 5 minutes can make a difference if done consistently, as repetition is key to enhancing effectiveness.

Here's an idea to get you started: Start each team meeting/huddle with a quick popcorn activity where you ask your team to share, "Who showed up for you on the team this week, and in what way?"

CONFLICT RESOLUTION: How you handle conflict within your teams can be one of the most trust-defining moments on your team. Handle it well, and you'll earn trust. Handle it poorly, and you'll lose trust.

The next time you are addressing conflict on your team, encourage collaboration by shifting the conversation from assigning blame to finding solutions. Create a space where everyone involved can contribute to resolving the issue.

TASK MANAGEMENT: Sometimes, showing our team that we trust them requires us to do something many leaders find very difficult to do – let go.

What task can you delegate giving ownership and accountability to someone on your team?

Now, go let that teammate know that you trust their skill set – and them – enough to take this on.

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



PRACTICING EXCELLENCE

LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FIVE: LEAD

SKILL: LEAD MODELING

Tip #1: Leader Modeling Behaviors

Leaders modeling positive behavior **encourages and facilitates team engagement**, greater credibility, and the authenticity of a **healthy team culture**.

Tip #2: Modeling Language

Leaders can model appropriate language to **reinforce what is expected of those they lead** regarding what they do, how they act, what is held as standard of performance, and how they will communicate with one another.

Tip #3: Modeling A Growth Mindset

Modeling a growth mindset involves **demonstrating leadership through learning**, with a **belief that the team can achieve more** through collaboration, feedback, and collective effort.

SUMMARY: Leaders should model positive behaviors, effective communication, and a growth mindset. By leading through example, leaders influence their teams’ actions, build trust, and foster a culture of continuous improvement.

CHALLENGE:

Do I show up as the same leader today as I did on my team’s first day?

NEVER SOMETIMES USUALLY ALWAYS

If the answer isn’t always, challenge yourself to improve in one area of modeling.

REFLECT (SELF):

Where do I recognize opportunities to improve in the following categories:

Modeling Behaviors:	
Modeling Language:	
Modeling A Growth Mindset:	

COMMIT (TEAM):

Hold a discussion where each team member identifies a behavior they want to improve. Track this behavior over one week and then meet to discuss how modeling this has influenced the team. What did you find? Ask team members to share how these behaviors have affected their own work. Encourage open feedback on leadership behavior.

AAR (After-Action Review)

Conduct an After-Action Review (AAR) on a recent project or task. Use this review to model a growth mindset by openly accepting feedback and encouraging team members to provide suggestions for improvement.

What happened and how did I show up?	
Why did it happen and why did I show up that way?	
What changes might I make to the way I show up if a similar situation happens in the future?	

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.

**SELF:**

**TEAM:**



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FIVE: LEAD

SKILL: INFLUENCE

Tip #1: Influence In Team Leadership

To effectively exercise influence, the leader must consider how to accomplish any given task while also **communicating properly** to each individual and **empowering them to contribute**.

Tip #2: Understanding Motivation

Knowing team members' motivations and what really lights their fire will help leaders **influence each of them** in their own way **to contribute to team results**.

Tip #3: Influencing Techniques

Leadership **influence can be exerted through both hard and soft tactics** with each method leveraging different forms of rationale, relationships, and social dynamics to **achieve compliance and engagement**.

Tip #4: Applying Influencing In The Right Circumstances

When leaders become **intentional and strategic with how they attempt to influence others**, they help teams solve more problems, grow as individuals, and engage in the work ahead.

Tip #5: The Impact of Influence on Authority

Leadership that's centered on the needs, motivations, and growth of those being led **builds higher-performing, stronger, and engaged teams**.

SUMMARY: Effective leadership relies on the ability to influence team members by understanding their motivations and employing appropriate influence techniques tailored to individual needs. Leaders should prioritize soft influence tactics, such as empowerment and inspiration, over authority and intimidation to foster a high-performing and engaged team environment.

CHALLENGE:

Ask your team to share with you what type of incentive motivates them most. How can you customize your leadership to keep your employees motivated based off of their answers?

REFLECT (SELF):

Do people do what you ask them to do because they want to contribute and add value to the team, or do they do what you ask them to do because they feel like they have to comply with your directives?

COMMIT (TEAM):

It's important that you spend some time getting to know your team. Even if you have done this in the past, consistency is key. What action will you commit to in order to foster this type of interaction with your team?

In order to get to know my team better, I will _____

Influencing And Empowering Your Team Through Knowing Them Well

To sincerely influence a member of our team, individualizing our approach is critical. We must consider our teammates' unique motivations, needs, and behaviors before attempting to influence them. Use the following table to guide you through reflections of your own team. If you don't know the answers, it's time to have a 1:1 conversation to get to know them better.

Team Member Name	Motivators at Work	Life & Career Aspirations	Stress Behaviors/ Shine Behaviors*

** Stress and Shine behaviors mean how do they behave when they are stressed and how do they behave when they are doing something they love and that they are really good at.*

How will you change your approach to influence based on what you know or learned about them in the reflection above? How will you change your approach based on the leadership influence knowledge acquired in this skill? The soft tactics from the nine primary influence approaches are listed on the following page, should you choose to incorporate them in your approach.

Team Member Name	Influence & Empowerment Approach



EXCHANGE: Exchange influence is used when a leader knows what is valuable to the person being influenced and offers something in exchange for compliance.

"I know you love to be with your family on New Year's Day. If you cover for the team on Thanksgiving, we can arrange for someone to cover for you on New Year's Day."



RATIONAL PERSUASION: Rational persuasion appeals to a follower's motivation by combining the request with logical arguments that support it.

"Given the data we've collected, we've determined that the most logical approach is to consult compliance."



SOCIALIZING: This soft tactic involves the leader attempting to build social rapport with the follower.

"I'm really impressed with what you've achieved this year. It would be great if you could continue to lead this project, because it is significantly contributing to the team's success."



PERSONAL APPEAL: To use a personal appeal technique, the leader will leverage their relationship with the person they're leading.

"You and I go back a long time, so I know we'll agree on this issue. Can you do me a solid and accomplish this task?"



CONSULTATION: The consultation approach requires leaders to engage those they lead in developing solutions or planning.

"My suggestion is to talk to other units and collaborate on a solution, but what do you think? How do you see this, and how do you think we can best accomplish this task?"



INSPIRATIONAL APPEAL: The inspirational appeal technique is the approach that most significantly involves the consideration of other peoples' perspectives.

"I've seen you do this kind of work before, and I know you're well-equipped to solve this tough issue with your team."

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FIVE: LEAD

SKILL: COMMUNICATING TO ENGAGE

Tip #1: Perception Of Leader Communication

If leaders want to truly engage their teams successfully, they must understand that **they are senders of messages** and must also be skilled at **interpreting how those messages are received**.

Tip #2: Precision In Our Words

Precision in communication **minimizes the risk of misinterpretation** and helps everyone—colleagues, families, patients—better understand the situation.

Tip #3: Cultural Implications Of Communicating

Leaders grow and learn when they recognize that **culture is an important aspect** of communication, and when they **adopt a posture of humility and curiosity to learn more**.

Tip #4: Candor And Transparency

To engage and develop teams, **leaders must speak with purpose**, candor, and transparency **so that trust is built** and growth and improvement are nurtured.

SUMMARY: Effective leadership communication requires clarity in message delivery and an understanding of how it's received, including adapting to cultural differences and ensuring precision. Candor and transparency are essential for addressing mistakes and fostering trust, with a focus on kindness and constructive feedback.

CHALLENGE:

Foster open dialogue during meetings by creating an opportunity for open discussion. This may feel uncomfortable at first if your team is not used to it, but stick with it. The more you allow your team to engage in conversations, the better you will understand how well you are communicating.

REFLECT (SELF):

In what ways can you adapt your communication style to fit different team members?

How can you better ensure that your message is not only delivered clearly, but also understood the way you intend?

COMMIT (TEAM):

Ask your team how they prefer to receive communication from you. Some may prefer text, while others say email, etc. Make note of these so you can refer to it when you have messages to convey.

Listening Circles Activity

You can do an activity with your team to sharpen both your communication and listening skills in order to foster more meaningful and engaging communication. Follow the instructions below.

1. Divide your team into small groups of 2-5 people.
2. Provide a topic related to your work or team goals. This could be anything from solving a project issue to improving team collaboration.
3. Each person gets 2 minutes to share their thoughts on the topic. During this time, *no one else is allowed to speak or interrupt*. The focus is on practicing clear, concise communication.
4. After someone finishes speaking, the next person must summarize what they heard before offering their own input.
5. Observe this conversation as a leader and take notes about what you learn about the way your team communicates with each other. *People often like to be communicated with the same way they communicate to.*
6. After all group members have spoken, reflect as a team on the exercise. Talk about what communication worked well and what could be adopted as a team practice going forward.

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM PART FIVE: LEAD

SKILL: LISTENING

Tip #1: Where And How We Listen

Applying the “gemba” walk to our routine **increases our ability to actively listen**, which is equally as important as our ability to convey messages.

Tip #2: Determining Team Morale

Determining morale through deliberate listening takes a practiced eye and a commitment to the health and well-being of our teams.

Tip #3: Finding Your Team Needs

Understanding our team’s needs is essential for creating a supportive and high-performing work environment where **team members feel valued**, inspired, and empowered to contribute their best efforts.

SUMMARY: Effective listening for leaders through techniques like “gemba” walks help them to observe and engage with teams. You can assess morale by understanding team dynamics and body language, and identify their needs by asking probing questions to uncover deeper motivations and areas for improvement.

CHALLENGE:

This week, spend time walking the floors and units where your team works. Engage with your teams informally and naturally. Be curious, open, and listen more than you speak. What did you learn?

REFLECT (SELF):

Practice the “7 Whys” activity with yourself using the following framework.

What’s a problem you or your team is facing right now? _____

Why is it happening? _____

Why is that? _____

Why is that? _____

Why is that? _____

Why is that? (*root of the problem*) _____

COMMIT (TEAM):

How would you describe “gemütlichkeit” or “a feeling of good health in the place where you exist” on your team? In other words, what does team morale look like? How are your teammates talking to and about each other? What’s their body language telling you?

What’s one action **you** can take to improve the feeling of good spirits on your team?

Essential Questions for Effective Team Leadership and Collaboration

When performing a “gemba” walk or beginning a 1:1 with your team, ask them these questions. Print this page and hang it on your desk or laminate it and take with you to remember. See how many “whys” you can ask after they respond. This will allow you to get past the surface and into the deeper understanding of your team. It will feel uncomfortable at first, but keep trying!

WHAT'S WORKING WELL?

1. What was the best thing that happened with a patient this week?
2. What are you grateful for?
3. When you're home and think about work, what makes you smile?

WHO SHOULD BE RECOGNIZED FOR THEIR PERFORMANCE?

1. Who provided help to you this week?
2. Who do you like to work with and why?
3. Who is the person you count on when things are difficult?

WHERE CAN WE IMPROVE?

1. Is there a system/process that makes it difficult for you to do your job?
2. Do you have the tools/equipment you need to do your job?
3. Tell me one thing that you might be able to do in your role to increase our patients' experience or perception of care?

HOW DO YOU FEEL ABOUT THE WAY WE ARE DOING THINGS?

1. What is the greatest aspect of being an employee here?
2. When do you feel best/most successful about your work?
3. What is the most important part of your work?
4. What would you say to someone thinking about working at your organization?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM:



LEADING TO ENGAGE CERTIFICATION PROGRAM

PART FIVE: LEAD

SKILL: RESPONDING

Tip #1: You Spoke – We Listened And Acted

If leaders are going to **take the time to listen** and observe their teams, they must also **take the time to share the results** of what they hear, see, and learn.

Tip #2: How Can I Help?

“How can I help” cultivates **mutual respect** and it lets your team know that you are “in this together,” ready to dive in, and that **they have someone who has their back**.

Tip #3: Tackling Difficult Challenges

By keeping their eyes on the goal, surrounding themselves with the right people, **breaking big challenges into smaller tasks**, and regularly tracking and reporting success against the goal, **leaders can handle any difficult obstacles** they might face.

Tip #4: Prioritizing Solutions

With clarity and focus on identifying the things that are both important and urgent, leaders can take each obstacle head-on with a **laser focus on their end goals**.

Tip #5: Communicating Progress

Not only do leaders need to listen well to their teams, they also need to **communicate challenges, progress, and appreciation** for the work the team is doing that **contributes to the overall mission**.

SUMMARY: Leaders must actively respond to team feedback, offer support in achieving goals, tackle challenges with clarity, prioritize tasks effectively, and regularly communicate progress to foster engagement, trust, and collective success.

CHALLENGE:

What is the note taking system you will implement today to continuously and consistently take notes of everything you see and hear from your teams so that you can develop a habit of seeing and responding to challenges?

REFLECT (SELF):

Take some time to reflect on your current “to-do” list using the Eisenhower Matrix below.

- 1. Spend 5 minutes writing down everything you need to get done in the next 7 days.
- 2. Organize tasks into the following four categories in the matrix: important and urgent, important and not urgent, urgent but not important, and not urgent and not important.
- 3. Analyze how you spend your time and reflect on how breaking down tasks in this way helps your clarity in leading your teams and responding to challenges.

URGENT		NOT URGENT	
IMPORTANT	DO Do these things today.	DECIDE Set a time to do these things.	
NOT IMPORTANT	DELEGATE Who can do these things for you?	DELETE Do not do these things.	

COMMIT (TEAM):

Commit to keeping your teams informed about what you are doing this week. Remember, this helps keep them aligned with the organization's priorities and shows how what they are doing is helping you and the organization as a whole. Use the space and framework from the tip below to help you prepare for this conversation.

What is the overall mission of your organization and team? Reiterating the mission and values, and referencing those things in your conversations, will influence the behaviors, actions, and decisions we make. We want to make the mission and values front and center when we are giving updates to our teams.

What are the current issues that you and the organization are facing and working through that the team might not be aware of?

How can you remind your teams that the work they are doing, and they as individuals, matter?

Tackling Challenges

Leaders who navigate challenges with resilience and grace can inspire confidence and trust among team members. They create a culture where team members are engaged and ready for newer and more challenging tasks. Use the following framework with your team to begin tackling challenges in this way.

Identify a difficult challenge you are facing

Name the goal that you are trying to achieve

List the people you think would be best to handle it

What small tasks can contribute to accomplishing the bigger goal?

Who will do these small tasks?

Analyze how completing each small task will help accomplish the bigger goal

What milestones (including dates) will be tracked to ensure that the team is on the right path?

When will results be analyzed and autopsied?

Use this time and space to record your takeaways, observations, questions, impressions of the information, how it is helpful to you, and your ideas for action and application.



SELF:



TEAM: