

Your leadership potential

Welcome

The world needs more good leaders. Leaders inspire and drive communities to act, they bring out the talents and potential in the people they serve, and they challenge the status quo to create novel ways of solving tricky problems.

Leadership is about cultivating who you are, not perfecting what you do. This partly explains why there has been a rapid decline in trust in leaders. We simply don't spend the time or apply the effort to deeply and honestly connect with who we are so that we can get ourselves out of the way, and have the impact we're capable of making.

In this first session of the EREA Pathways to Leadership program, we're going to spend the day digging into what leadership means to you. The *Learning Leadership* framework developed by leadership experts Jim Kouzes and Barry Posner will form the backbone of the day. Other powerful ideas and tools will be layered on top.

This workbook is split into three sections, which reflects the flow of our first session.

Section 1: Know and believe in yourself

- Understand personality to reveal your strengths and growth edge.
- Define your leadership purpose.

Section 2: Aspire to excel

- Embrace adaptive challenges using the [Immunity to Change X-Ray](#)
- Deliver an [exemplary leadership challenge](#).

Section 3: Engage support, practice and commit

- Leverage your sponsor (refer to sponsorship playbook).
- Map progress towards achieving your adaptive challenge over time.

I'm looking forward to getting stuck into these ideas with you all! Please reach out if you have any questions.



Yolanda Beattie
Director

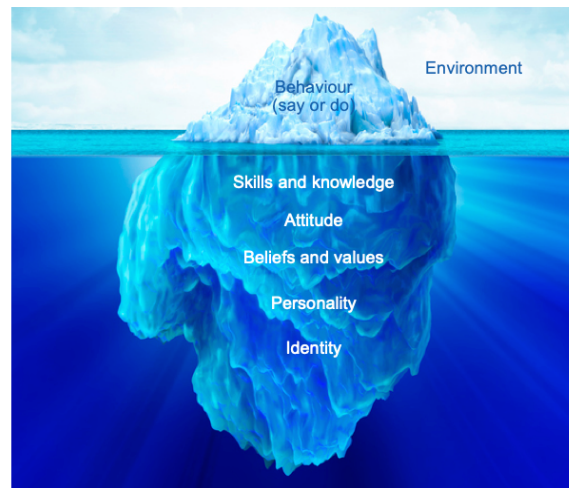
Section 1: Know and believe in yourself

Understanding personality

Personality preferences shape our perceptions and behaviours (what you say and do). Knowing yours and others preferences is incredibly helpful for understanding how you show up for others. This in turn revolutionises interpersonal relationships.

We'll be using the Clarity 4D personal profile to unlock these insights. Based on Jungian psychology, Clarity 4D generates personality insights based on our preferences for gathering information (sensing / intuition), making decisions (thinking / feeling) and responding to situations (introversion / extraversion). These preferences are then translated into four 'colour energies'.

Your personality impacts your behaviour



Your personal profile will show a reading for all colour energies. That's because all of us can adapt our style to suit different circumstances. Most of us will have a strong preference for two colour energies, which reflects our default mode and where we feel most comfortable.

People who have the same colour energy preferences are likely to feel like familiar friends the moment they meet. That's because their automatic brain processes their common styles as safe and likeable (aka affinity bias). People with opposite colour energy preferences are more likely to be perceived as a threat or annoyance. Perception means there are generally two sides to any personality trait. Decisive / insensitive, factual / cold, animated / self-promoting, caring / submissive are all examples of how two different people can perceive the same personality.

Being conscious about how your personality might be perceived and how you might be perceiving others can avoid a whole lot of misunderstandings and upset. Taking it one step further and adapting our style to suit the preferences of others can dramatically improve our ability to influence.

Explore your personality to improve your self-awareness and unlock growth goals

Read page 5 – 7 of your Clarity 4D profile and highlight anything that resonates as a strength that you appreciate about yourself. Share with a learning partner

Read page 9 (Diversify your hidden potential) of your Clarity 4D profile and highlight anything that resonates as a development area you might want to explore as an adaptive challenge.

Now let's have some fun with the power of perception. The lists below capture the two sides of the four colour energy personality types. Take a moment to have a chuckle at your flip side traits (there will be some that really resonate) and then mark which ones most relate.

 Clarity4D clear colourful communication Factual Careful Quiet Conventional Organised Deep thinking Logical Self-disciplined Meticulous Reflective Analytical Conscientious © 2007 Clarity4D www.clarity4d.com	 Clarity4D clear colourful communication Preoccupied Remote Over-exacting Unenthusiastic Distant Rigid Conformist Sceptical Overcritical Cold Unbelieving Resistant © 2007 Clarity4D www.clarity4d.com	 Clarity4D clear colourful communication Decisive Proactive Passionate Focused Assured Direct Bold Achieving Brave Persistent Striving Forthright © 2007 Clarity4D www.clarity4d.com	 Clarity4D clear colourful communication Insensitive Arrogant Impatient Self-opinionated Controlling Domineering Aggressive Hot-tempered Relentless Inconsiderate Reckless Dismissive © 2007 Clarity4D www.clarity4d.com
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Define your leadership purpose

In this section, I mostly draw on the work of Douglas Conant and Amy Federman captured in their book *The blueprint: 6 practical steps to lift your leadership to new heights*.

Conant and Federman draw the distinction between incidental and intentional leadership. As the name suggests, [incidental leadership](#) operates in a primarily haphazard and reactive mode. Improvement and impact are marginal, and often accidental.

[Intentional leadership](#) recognises that leadership is as much about cultivating who you are, as it is about perfecting what you do. Bringing a purpose-driven and proactive mindset to your leadership journey allows you to continually learn, grow and improve so you can best serve your stakeholders, your organisation and yourself.

We're going to get intentional and define your leadership purpose by connecting with:

- the best stuff in your past that has shaped you into the person and leader you are today
- your leadership promise
- your values

These activities are design to connect you to your best self and will hopefully act as a clarion call that will motivate your growth journey.

Best stuff exercise

The memorable accomplishment or experiences that have shaped your life and your leadership

In this exercise you will identify and then describe eight specific accomplishments or experiences across your entire life that you:

- Enjoyed doing (it was fun and satisfying)
- Believe you did well (you provided high quality)

These may be related to work, home, leisure, projects, or relationships. To keep in mind:

- Focus on the highlights in your life, regardless of when they occurred. Perhaps all your memorable experiences occurred before you were twenty years old, or after you were married. You don't need to spread them out.
- Identify what was important to you, not what other people might think was important.
- Relate specific achievement experiences, not general ones.

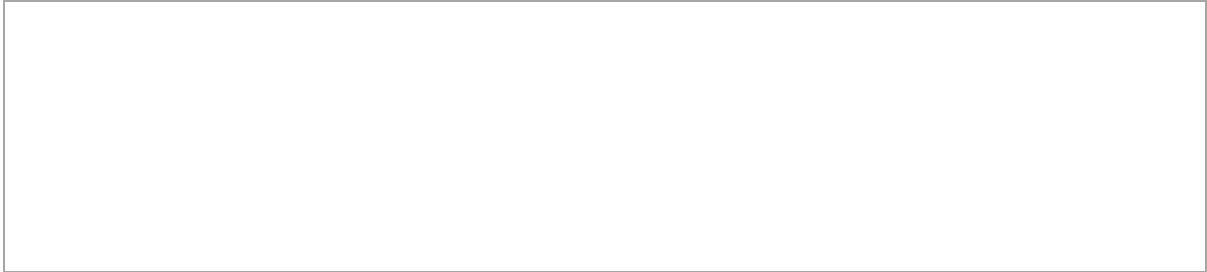
Write a short summary statement in the table a few pages over about each of the eight achievements or experiences:

- How did you get involved?
- Elaborate on what you did.
- What was particularly enjoyable, fulfilling, or satisfying?
- What skills, abilities or talents did you use?

What was the achievement or experience and how did you get involved?	What did you do?	What did you most enjoy?	What skills or talents did you use? How does your personality profile reflect these?

Look at your notes.

Do you see any **common threads**? (ie being in the public eye, adventure, diversity, newness, enduring relationships, leadership, risk taking, troubleshooting, giving, selling or motivating, seeing other people grow from your mentoring, a tough task you addressed and conquered, creative acts, altruism).

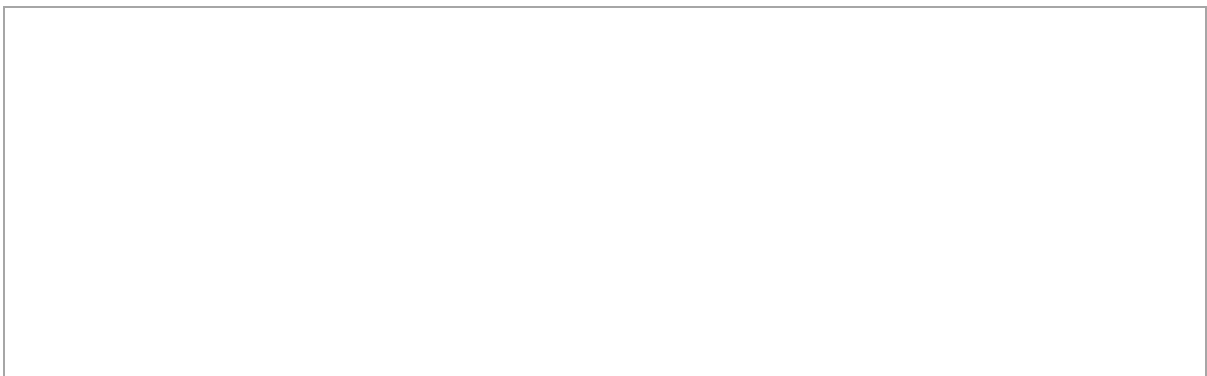
A large, empty rectangular box with a thin black border, intended for the user to write down common threads identified from their notes.

From these common threads, make a first pass at naming what you believe are **your gifts**. (ie inspiration, leadership, dealing with the power brokers of the world, serving the downtrodden, intuition, relationship building, intensity, ability to focus, decision-making, conflict resolution, planting seeds, nurturing small plants, harvesting the crop).

A large, empty rectangular box with a thin black border, intended for the user to write down their gifts identified from the common threads.

You may also consider sharing your eight experiences with others and asking for their reflection on the themes they hear.

How you can integrate more of the best stuff into your work and life.

A large, empty rectangular box with a thin black border, intended for the user to write down how they can integrate the best stuff into their work and life.

Your leadership promise

Now that you've reflected on your greatest achievements and accomplishments, have a think about what people can expect from you. What makes you different? What parts of your personality do you currently draw on most in your leadership? Your Clarity 4D personality profile will be useful here.

What about the parts of your personality that you tend to hold back, especially the aspects that you like or that work for you in a non-work context? Why do you hold those back? What difference would it make if you were to bring those into your leadership style?

Leadership values

Values guide our behaviours and help us be consistent, especially when we're tested. Can you think of a time where you took a principles stance on something when it might have been risky, inconvenient or damaging to your career to do so? Describe it below. What was the principle you were defending?

Describe a time when you had to make a difficult decision or have an uncomfortable conversation out of integrity with what you believe and value. What was so important that it was worth defending despite the discomfort?

Now think of a time, when you know you could have taken a stand on something but you didn't. What was the situation, why didn't you and what were the consequences?

The values that govern your leadership choice are most likely found in these answers.

Write down your leadership values and why they're important to you. For example, I value integrity with commitments because it drives me crazy when people don't follow through on what they say they'll do.

Value 1

Value 2

Value 3

Value 4

Value 5

Value 6

Now you've explored your best stuff, leadership promise and value, let's look at your leadership purpose. Take a stab below.

Section 2: Aspire to excel

Adaptive challenges

Adaptive challenges are different to technical challenges because they require us to change. We can't just learn new skills or gain more knowledge to solve an adaptive challenge. Instead, we need to fundamentally change at the level of identity and mindset before we can change the behaviour.

Shifting at the level of identity requires us to first see and let go of the filters that currently shape our worldview. Because these filters are self-protection mechanisms, they provide a portal into our ego and therefore unlock the biggest barrier to personal growth and freedom.

This insight is the basis of Harvard developmental psychologists Kegan and Lahey's [Immunity to Change model](#). By wrapping it up into a neat process, their tool provides a framework for leadership teams to do the transformational development work that improves leadership impact. The mental complexity of leaders also increases by training their truth-seeking and truth-telling capacity while nurturing their ability to handle contradictions and paradoxes.

Some of the commitments I've been privileged to help leaders shift include:

- "I commit to being more open to other people's perspectives and less defensive when challenged by working on my fear of not being good enough."
- "I commit to delegating work more evenly across the team and managing under-performers more proactively by letting go of my story that I don't have enough time."
- "I commit to asking for help from others earlier by letting go of my obsession with being right."
- "I commit to being more intentional about how I lead my team and my life by letting go of my story about being busy as a cover-up for my fear of being incompetent."

Reflecting on your personality profile and leadership story, have a go at articulating your one big thing?

Overcoming insecurities to achieve adaptive challenges

In the context of the Immunity to Change X-Ray, connecting with our ego or identity reveals:

- the behaviours that work against our goals
- our hidden commitments
- assumptions that drive our current behaviour
- our progress map - what we can do over time to achieve our adaptive challenge.

I use [The Line](#) as a playful and powerful tool to reveal how our ego works. Follow the steps below to see when your ego is triggered and you go below the line, and what you can do to get back above it.

The Line

Step 1

The first step of seeing how you go below the line is to pick any relationship issue or persistent complaint. Preferably it is one that you have struggled with for some time and has “juice” for you. Name the person and your core complaint about them, or the issue.

My biggest complaint is about _____ is _____.
(name)

Example: My biggest complaint about Sarah is that she doesn't listen to me
 My biggest complaint about the sales team is they don't value our work
 My biggest complaint about leadership is they don't respond to our feedback
 My biggest complaint about customers is they're rude and ungrateful

If you're having trouble finding a complaint about someone or something, refer to page 6 and the ways we go below the line. See what connects.

Step 2

As you think about this issue, “Where are you?” Above the line ____ or below the line ____?

Step 3

What do you do when you go below the line on this issue?

- ___ I gossip / vent with others
- ___ I withdraw and / or avoid the person or avoid confronting the issue
- ___ I blame this person / believe they are wrong and I am right
- ___ I become critical
- ___ I become angry / become aggressive / anxious

Other:

Step 4

Acknowledge the payoffs that you are getting from keeping this issue going below the line.

- ___ I get to avoid my core feelings, especially the feelings of (fear, sadness, anger)
- ___ I get to stay connected
- ___ I get enlivened by adrenaline
- ___ I get to stay in the familiar and avoid the unknown
- ___ It gives me something to do or a compelling story to tell
- ___ I get to avoid taking responsibility for my issues
- ___ I get to be right about the following:

Step 5

Can you accept yourself for being just where you are? Yes _____ No _____

Step 6

Are you willing to shift? Ask yourself these willingness questions to find out. Your learning moment comes from the questions you answer 'no' and the questions that are hard to answer 'yes'. These will reveal how you go below the line.

- | | | | | |
|--|-----|-------|----|-------|
| a) Are you willing to end all blame regarding this issue? | Yes | _____ | No | _____ |
| b) Are you willing to let go of being right? | Yes | _____ | No | _____ |
| c) Are you willing to feel your (sadness, anger, fear) related to this issue? | Yes | _____ | No | _____ |
| d) Are you willing to see that the opposite of your story is as true? | Yes | _____ | No | _____ |
| e) Are you willing to reveal anything you're withholding about this issue? | Yes | _____ | No | _____ |
| f) Are you willing to stop all gossip about this issue? | Yes | _____ | No | _____ |
| g) Are you willing to clean up all broken agreements related to this issue? | Yes | _____ | No | _____ |
| h) Are you willing to shift from entitlement to appreciation about this issue? | Yes | _____ | No | _____ |
| i) Are you willing to let go of taking this issue seriously? | Yes | _____ | No | _____ |

Based on your responses above, are you willing to shift? (any No above is a No)

Yes _____ No _____

If yes, move on to step 6 and 7. For most of us, getting above the line on relationship conflict takes further work. Head to the deep dive section to keep going, then revisit if you're willing to shift.

Step 7

Based on your current commitment in this moment regarding this issue, complete this sentence.

Today is _____ and I am committed to _____.

Step 8

If you are willing to shift, "How will you shift?" What is one action step you can take and by when will you take it?

My measurable action is: _____

I will do it by: _____ at _____

(Date)

(Time)

Letting go of blame and being right

This deep dive exercise helps us say 'yes' to a) and b) of the willingness questions while also revealing the behaviours that are working against our adaptive challenge goal.

Almost all interpersonal conflict arises out of drama where well-worn scripts of victims, villains and heroes drag us below the line. When we're stuck in drama, we're blaming others and committed to being right. Watch this [video](#) to learn more about the drama triangle.

Now I invite you to map out your drama triangle for this relationship issue / persistent complaint. Refer to your drama cards for inspiration. I encourage you to be as dramatic as you can be!

The victim in my drama is

The persona I'm / they're taking on is

I'm / they're commonly saying

I / they look out for

The villain in my drama is

The persona I'm / they're taking on is

I'm / they're commonly saying

I / they look out for

The hero in my drama is

The persona I'm / they're taking on is

I'm / they're commonly saying

I / they look out for

Persona interview

Chose a persona that you think is running the issue. Take on the posture, voice and attitude of this persona, and give it a name. Then answer the following:

[Persona name], What is the most important thing to you?

[Persona name], What are you most proud of in how you served (person's name) in his/her life?

[Persona name], When did you make your first appearance in (person's name)'s life?

[Persona name], who did you learn your style from?

[Persona name], what are you most afraid of?

[Persona name], in your heart of hearts, what do you MOST want?

[Persona name], What is your gift?

Teaching your drama class

In the exercise above, you've mapped out your drama triangle and you might have started to see your role in the relationship conflict you're experiencing. Now we're going to bring that to life with a fun exercise by pretending you have been hired by a university to teach a class on how to create the EXACT same issue that you are having in your life.

Your students need you to give them very specific instructions that they can follow to create the outcome you are currently experiencing. Using the questions below as prompts, define the five or so steps they would need to take to recreate your issue in their life.

Questions to answer to help you create your drama:

What actions do you take or not take?

What do you have to believe about yourself, others and the world?

What feelings do you repress/conceal?

What are you trying to control that is NOT in your control?

What do you have to be right about?

What do you withhold and from whom?

What do you not face?

How do you numb yourself from the discomfort?

What "shoulds" do you have to believe?

To what do you feel entitled?

What do you believe you do not have enough of?

What either/or story do you have to hold about this issue?

Who do you blame?

How do you fix it, but only temporarily?

Who do you have to be better/less than?

What agreements do you have to make and/or break with yourself or others?

What do you have to be afraid of?

Course title _____

Example: How to have a dissatisfying relationship with your boss 101

From drama to radical responsibility

Now let's gain some further insight into your dramas by exploring radical responsibility. Radical responsibility is where you take 100% responsibility for how this issue is occurring in your life. Taking responsibility is likely to be key to achieving your adaptive challenge.

Gain insight by completing these statements, repeating each of them several times, until you have what feels like a breakthrough:

From the past this reminds me of...

I keep this issue going by...

What I get from keeping this issue going is...

The lifelong pattern I'm noticing is...

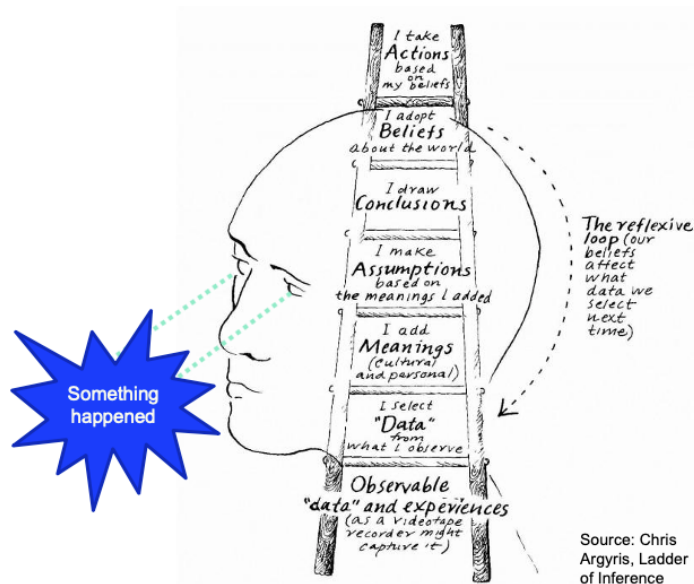
I can demonstrate 100% responsibility concerning this issue by...

Seeing the opposite of your story

This deep dive exercise helps us say 'yes' to d) of the willingness questions and reveals the assumptions we are adopting to make our current behaviours make sense.

How we adopt beliefs and take actions based on our beliefs

Believing our stories are true is one of the most common ways we go below the line. Indeed, it's the source of most human suffering. That's a big call! Let me explain.



Neuroscientists and developmental psychologists have shown the human brain adopts beliefs or stories about the world by applying their personal and cultural meanings to the data they select from what's observed. We then take action and tend to collect more data that confirms our beliefs. This is how confirmation bias occurs.

Suffering and conflict occurs when the stories we tell ourselves are critical and negative – about ourselves, others or our environment. The tighter we hold onto those stories, the more suffering and conflict created.

You might be asking: What if those stories are objectively or morally true? Like people shouldn't be racist? Or

bullying is bad? Or that manager really is incompetent (insert list of evidence)?

The problem arises when we tightly hold onto these beliefs and so engage with that person or issue from a place of being right, setting ourselves up for a war that no-one wins. In the process we shut down our ability to learn and be curious, and achieve a win for all outcomes. Our ability to influence is diminished.

If we have these conversations from above the line, we invite a shared understanding that is more likely to create outcomes where everyone learns and grows.

Fact vs story

Let's apply this concept now to the issue you're working with by following the steps below.

Step 1 Define a recurring issue that you are willing to shift

Step 2 Write down all the facts related to the issue. Facts are what a video camera would record (without music and interpretation of tone)

Step 3 Write down all the stories you have about the facts. These are what you make up about the facts. Look for 'shoulds', judgements, interpretations and emotions.

The issue is _____

Facts	Stories
What a video camera records	What you make up about the facts

The next step follows [The Work of Byron Katie](#). Katie (as she is known), encourages a meditative approach where we reflect on a limiting belief we're currently holding onto.

Pick one of the stories above that resonates the most and write it down here:

Close your eyes, take a few deep breaths and contemplate that statement. Then ask yourself four questions:

1. Is it true?

2. Can you absolutely know it's true?

3. How do you react, what happens when you believe that thought?

4. Who would you be if I could erase that thought from your mind?

Once you connect with how much being right is costing you, it becomes easier to see how a whole range of opposites might be equally as true, not necessarily more true, but equally as true. This is where the turnaround comes in. Here's how turnarounds work:

Current belief: Jill is unkind to me. Alternate stories: I am unkind to Jill. Jill is kind to me. I am unkind to me.

Write down all of the opposites of your story and any evidence you can find that supports these alternate views. There won't always be four opposites and sometimes there may be more than four.

Alternate stories	Evidence of alternate stories
1.	
2.	
3.	
4.	
5.	

This exercise helps us let go of limiting beliefs by constructing a range of new ones, which in turn dissolves our commitment to being right, helping us to shift above the line.

Section 3: Engage support, practice deliberately and commit to greatness

In this final session of the day, we set up your action-learning activity:

- Engaging support of your sponsor with regular and purposeful meetings, referring to the sponsor guide for inspiration
- Map what progress looks like for your adaptive challenge
- Progress your leadership challenge, referring to the [Kouzes and Posner's 5 practices of exemplary leadership](#).

Mapping your progress to achieve your adaptive challenge

The next step to achieve your adaptive challenge is to map out what progress looks like. These should follow the good old SMART principle and be both practical actions as well as new longer-term habits that help you adapt at the level of mindset and identity.

For example, if you're working on having difficult conversations, practical steps might be:

- list the conversations you're avoiding
- lean into the fears you have about having them
- prepare some notes to have a feedback conversation, recognising the stories you're making up (I can give you a good structure for this)
- set up the feedback meetings
- have meetings

Because achieving adaptive challenges requires us to fundamentally change at the level of mindset and identity, you might also like to consider habits that improve self-awareness and nudge new behaviours. The willingness questions outlined earlier, also provide a range of ways you can make progress.

Here are some other thought starters for how progress happens. See what resonates and what you can commit to before completing your progress map.

Progress area	Inspiration	Your commitment
Accountability and feedback	In addition to your sponsor, who can you share your adaptive challenge and Immunity to Change X-Ray with? What feedback can you request? How can they hold you accountable to progress?	
Conversations	The more you discuss and explore the topic, the more you internalise and adapt to this extraordinary way of living and leading. Who can you talk to about adaptive challenges, ego threats and drama triangles? Perhaps your intimate partner, children, a friend who's into personal and leadership development?	
Self-reflection	Research shows leaders and teams who self-reflect are more productive. Yet most don't. The key is to identify a few important questions that stimulate higher order thinking and diarise the time either at the end of the day or week. Ten minutes is a good starting point, longer will take you deeper and yield more insight. Here are some good questions to get you started: When did I go below the line today? What pay-off did I get? Can I accept myself for going below the line? Am I willing to shift? What do I need to do to shift? What am I avoiding / not facing? What's the hardest thing to accept? What do I really want? What do I choose now? What's an easy step I can take to start creating what I really want?	
Reading	What can you read to immerse yourself in these ideas? Here are some pointers: Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization The 15 commitments of conscious leadership Chatter: The Voice in Our Head, Why It Matters, and How to Harness It Transcend: The new science of self-actualisation	

Listening Podcasts are an excellent way to absorb new ideas. Here are some of my favourite episodes on leadership and personal growth that you might find inspiring:

[Jim Dethmer: Leading from above the line](#)

[Jim Collins: Relationships v transactions](#)

[Kris Cordle: Releasing the ego](#)

[Caroline Webb: How to have a good day during a global pandemic](#)

Mindfulness Everything we feel, think, say and do is a function of our mind. Everything we have discussed in this workbook requires us to be present to how we're thinking, feeling and behaving, before we can shift.

That's why observing and training your mind is arguably the most valuable gift you can give yourself and others. This is the art and science of mindfulness.

The [Waking Up](#) app by Sam Harris offers a range of great meditations and inspiring talks. He also puts lots of talks in front of his paywall. Here are some of my favourites:

[The science of meditation](#)

[Meditation in an emergency](#)

[The science of happiness](#)
