COLLECTIVE LEADERSHIP ASSESSMENT
ENGAGEMENT – CHECKLIST
END-TO-END

I. Engagement for CLA – conversation with client

Client Context/Needs Assessment (to determine the Business Case for Proposal)
Examples of questions to elicit:

- [ ] Why am I here? Why me/us? How did you learn about me/us?

- [ ] Background, high level context e.g.

  - ○ History, markets, business environment

  - ○ Size (people, businesses, financials), how structured

  - ○ Growth / progress – financial and/or other

  - ○ Challenges

- [ ] Strategic imperatives

  - ○ Metrics or measures used for progress and success

- [ ] Catalyst for developing collective and individual leadership and/or culture

  - ○ What's working? What's not?

  - ○ Organizational / team needs & current reality and desired future

  - ○ How they would describe the culture – What needs to change?

  - ○ Previous assessments – What worked/didn't? Who with?

  - ○ What other initiatives are happening in the organization / team

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- How confident are you that the business will succeed with the Strategy and Senior Leadership Team currently in place? (p.21, Mastering Leadership)

- What is the appetite for time frame – short term, 1 year, multi-year engagement

- Any budgetary constraints, including budget cycle

- [ ] Reasons why CLA makes sense i.e. leveraging untapped advantage when Collective Leadership is aligned

- [ ] What else is going on (using Integral 4 Quadrants model)

- [ ] Who are the primary decision makers

- [ ] Anything else that can shine a light on why start with CLA followed by LCPs and Group LCP

2. Architecture/CLA Structure & Costing

- [ ] Who is the focus of the CLA i.e. Who are the collective leaders and why start with them

- [ ] Who is assessing them

- [ ] Team Focus or Organizational Leader Focus

- [ ] How many Functional/Team/Business Unit Circles

- [ ] How many participants in each

- [ ] Timeframes for

  - CLA launch

  - One-to-one interviews

- ○ CLA Briefing
- ○ Debrief Senior Leader
- ○ Workshop/s
- ☐ Bar charts required or not
- ☐ Costing based on above

3. Proposal & Agreement

- ☐ Proposal to client including Business Case and recommendations
- ☐ Contractual agreement

UPON PROPOSAL ACCEPTANCE …

4. Confirm Logistics

- ☐ Confirm with client contact person and/or venue coordinator – workshop dates, number of days, number of participants
- ☐ Send logistical and technical requirements including
  - ○ Room size and layout – ideally very large room for CLA Mat
  - ○ Length of time room required
  - ○ Breakout spaces (if required)
  - ○ Audiovisual requirements – data projector, screen, sound, flip charts etc.
  - ○ Meals and refreshments

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○ Break times

○ Other materials e.g. flip chart markers, name tags

5. Information Required for CLA Prelaunch

May include some of above info and in parallel with Step 6 below

☐ Confirm number of CLA Circles and completion deadline, workshop dates etc.

☐ Craft wording for CLA Invitation Letter to go out from Senior Executive/ Leader

☐ Craft wording from consultant to attach to letter from Senior Executive/ Leader

☐ Craft wording for Descriptor Focus, for placing CLA order (Team or Org Leader focus) – refer to Appendix

☐ Craft wording for email which contains CLA survey link (using wording in Descriptor Focus)

☐ Final list of names and email addresses based on number of CLA Circles required

☐ Set up CLA Survey/s with names and emails addresses (Circle by Circle)

☐ Monitor evaluator responses

☐ Send reminders

○ Systems reminders

○ Personal reminders 3 days from completion date (NB: may need to resend if needed)

6. Introduction Briefing Letter from Senior Executive/Leader

May include some of Step 5 above

- [ ] Briefing letter sent including reasons why, including

    - ( ) Linked to strategic / business imperative

    - ( ) Intro to consultant and request to set time aside to speak re Team &/or Organizational Dynamics & Culture Impact of Collective Leadership (One-on-One Interviews)

    - ( ) Schedule for one-on-one interviews. N.B. These normally happen in parallel with CLA completion timeframe – these are optional

B.   One-on One Interviews (if applicable)

- [ ] Confirm interview schedule

- [ ] Conduct interviews

- [ ] Analyze and synthesize interview information

8. Post CLA Completion & Pre Debrief W orkshop

- [ ] Email pre reading and video/s to watch prior to debrief workshop, plus confirm workshop date/s

- [ ] Run CLA Reports & Graphs

- [ ] Create Bar Charts (if using) – 2 per CLA Report

- [ ] Analyze data along with summary from interviews

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- [ ] Determine handouts to be used
  - ( ) CLA Blank Graphs
  - ( ) Leadership Journey / Stages of Development
  - ( ) LCP Correlations to Leadership Effectiveness & Business Performance
  - ( ) Gifts in The Reactive
  - ( ) Spare copies of Pre-Reading
  - ( ) Copies of CLA Graphs & Bar Charts
  - ( ) 2-3 copies of CLA Report/s in full
- [ ] Arrange printing
  - ( ) A1 / Poster Size for CLA Graph/s and Bar Charts
  - ( ) A4 for handouts
- [ ] Check other logistics including CLA or LCP Mat availability
- [ ] Finalize PPT deck with client CLA Graph/s & Bar Chart/s

9. CLA Debrief Workshops & Follow Ups

- [ ] Refer to Debrief Workshop Session Plans

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APPENDIX

Descriptor Focus for Collective Leadership Assessment (CLA)

The Descriptor Focus is a part of the actual CLA order and the wording your insert in spaces provided in the order is then added to a part of the instructions in the survey, which are seen when the survey taker logs in.

<u>To be clear, there are words that are fixed and blank spaces for you to customize text</u>

Below are some examples to help you in your process (the fixed wording is in **BLACK AND BOLD BELOW** and the edit-able part is in red with suggestions).

IF YOU ARE DOING A TEAM FOCUS:

Survey Instructions:

In this section you will be evaluating Members of the Collective Leadership Team, yourselves as the Executive Leadership **Team.**

<u>OR</u>

In this section you will be evaluating Members of the Executive Team i.e. yourselves as the collective members of the **Team.**

IF YOU ARE DOING AN ORGANIZATIONAL LEADER FOCUS:

Survey Instructions:

In this section you will be evaluating Leaders / Managers of the Executive Team of COMPANY NAME (as the Organizational Leaders) **Organization.**

<u>OR</u>

In this section you will be evaluating Leaders / Managers of the COMPANY NAME **Organization/Team.**

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