

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



- 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



- 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 Workshop

- 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



- 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



APPENDIX

Descriptor Focus for Collective Leadership Assessment (CLA)

The Descriptor Focus is a part of the actual CLA order and the wording you 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.

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

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.

OR

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.

OR

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

