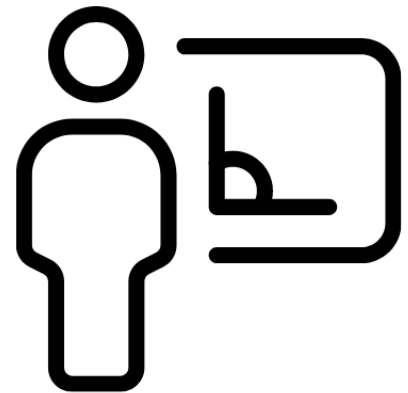


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



Define success on your own terms, achieve it by your own rules, and build a life you are proud to live.

Anne Sweeney

Module Two: The Evolution of Leadership



As long as there have been leaders, there have been those who tried to determine how and why they were successful. Leadership itself has not evolved, but our understanding of it has. It is important to understand why very different leadership styles can be effective, why the same leadership techniques will not work in every situation, and which leadership style fits your personality best. Everyone has leadership potential within them, but understanding these concepts will help you maximize your leadership ability.

Defining Leadership



Simply speaking, “leadership” is defined as “the ability to lead.” Unfortunately, this is not very helpful. A better definition comes from the BNET online Business Dictionary: *“The capacity to establish direction and to influence and align others toward a common goal, motivating and committing them to action and making them responsible for their performance.”* Although this is more descriptive, it is not substantial. It does not tell us what leadership actually *is*, but rather what it *does*.

Estimated Time	15 minutes
Topic Objective	To understand what is meant by the term “leadership.”
Topic Summary	To know what true leadership is, we need to examine the characteristics of a leader.
Materials Required	Flipchart and markers Worksheet 1-Goal Card
Planning Checklist	At the beginning of the exercise, write the word “Leadership” at the top of

	the flipchart page.
Recommended Activity	<ul style="list-style-type: none"> • Ask everyone for qualities that they identify with leadership. Write these on the flipchart at the front of the room (be sure to post the paper in a visible spot in the room when done). Try to get at least 10 to 15 qualities, traits, or attributes. • Have the class rank the list in order on another flipchart paper. • In the notes area below, have participants list 5 leadership qualities that they believe they already possess, even if they feel they need to develop it more. • Create a Goal Card with the name of the leader, they want to emulate, have participants write five leadership traits they most want to develop. Have them place the card in a visible place in from of them.
Delivery Tips	This activity can be performed in small or large groups.
Review Questions	What are the characteristics of a leader?

Characteristics of a Leader

The mark of a true leader is not a position or title held, but it is how many people are willing to follow them. Santa Clara University and the Tom Peters group outline the following leadership characteristics:

- **Honest**
- **Competent**
- **Forward-looking**
- **Inspiring**
- **Intelligent**
- **Fair-minded**
- **Broad-minded**
- **Courageous**
- **Straightforward**
- **Imaginative**



Estimated Time	10 minutes
Topic Objective	To discuss the characteristics of a leader
Topic Summary	This exercise asks participants to discuss the specific characteristics of a leader
Materials Required	Flip chart/markers
Planning Checklist	None
Recommended Activity	Brainstorm words/characteristics that make a great leader
Stories to Share	"Your reputation is what others think of you; your character is what you truly are. Reputations can be manipulated; character can only be developed and maintained." – Bohdi Sanders
Delivery Tips	None
Review Questions	What leader characteristics do you possess?

Leadership Principles

The United States Army offers 11 Leadership Principles:

- Be tactically and technically proficient
- Know yourself and seek self-improvement
- Know your soldiers and look out for their welfare
- Keep your soldiers informed
- Set the example
- Ensure the task is understood, supervised and accomplished
- Train your soldiers as a team
- Make sound and timely decisions
- Develop a sense of responsibility in your subordinates
- Employ your unit in accordance with its capabilities
- Seek responsibility and take responsibility for your actions



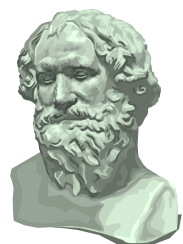
You will notice that none of the above actually tells you *how to lead* in a practical manner. They don't address what to do or say in any given situation. That is because there is no real formula to being a leader. Leadership must come from within and it is based on your personality. In this training, you will learn how to develop your innate leadership abilities and build the confidence required in being a true leader.

Estimated Time	15 minutes
Topic Objective	To compare what is considered "leadership."
Topic Summary	Comparing our instincts about leadership with characteristics considered important by others.
Materials Required	Flipchart and markers
Planning Checklist	Maintain the previous Leadership lists in a visible location.
Recommended Activity	<ul style="list-style-type: none"> • Go through the Characteristics of a Leader and the Army Leadership Principles and compare them with the previous two lists posted on the flipchart paper. • Note where each is on the lists developed by the class. • Note the similarities and differences and discuss them.
Delivery Tips	This activity can be performed in small or large groups.
Review Questions	What are the most commonly agreed upon characteristics of a leader?

A Brief History of Leadership

Historical Leaders

Throughout the centuries, there have been leaders. We are social animals who bond together, but we look for order against the chaos of life. We look to be organized to accomplish tasks as a society that we cannot perform individually. As a result, someone inevitably ends up in charge.



Leaders in the past have generally belonged to one of three categories: Political, Military or Religious.

- Political: Around 1790 B.C., Babylonian ruler Hammurabi created the codified laws, which unified his empire in what was seen as a fair order as all people were subject to the same rules.

- **Military:** Sun Tzu was a military general in China from 500 B.C. He wrote the Art of War, and although he was a great military leader, his book is actually about how to *not* use armies except as a last resort, focusing more on wise political policies and strategies to prevent war.
- **Religious:** It may be said that religious leaders have had the greatest impact on their societies, with results that last for centuries.

Modern Leaders

With the rise of the industrial revolution, a new kind of leader emerged: Economic. The so-called Captains of Industry found they could build an empire based on modern technology instead of swords. Oil Barons, railroad magnates, and factory owners built large fortunes without the benefit of armies; it was often at the expense of the people they employed. This gave rise to Union leaders and various movements designed to promote justice where abuses were perceived to exist.

The Industrial Revolution also increased the number of Scientific Leaders, as scientists now had easy access to a wide range of new materials for their work. Psychiatry and Psychology came into prominence with studies on the workplace, in regard to improving productivity and the effect on the workforce.

Studies have shown consistently that workers are more productive when they are in a “positive work environment.” The attitude and influence of the boss is a major factor in this productivity. If employees feel they are listened to, respected, and treated fairly, they are happier in their work and perform better than those who feel they are disrespected and unappreciated. Which kind of work environment would *you* prefer?

Estimated Time	10 minutes
Topic Objective	To discuss the historical leaders
Topic Summary	This exercise asks participants to discuss leaders of the past
Materials Required	Flip chart/markers
Planning Checklist	None
Recommended Activity	Brainstorm leaders of the past – jot ideas down on flip chart
Stories to Share	“Those who do not remember the past are condemned to repeat it.”
Delivery Tips	None
Review Questions	Who said the above quote?

Three Theories of Leadership

The Great Man Theory

The Great Man Theory was abandoned in favor of the theories of behavioral science. It's easy to be inspired by stories of great men and women who did great things in their lives. Alexander the Great conquered the known world. Genghis Khan then ravaged most of it. Abraham Lincoln freed the slaves. Harriet Tubman saved hundreds from slavery in the Underground Railroad. Mother Theresa aided and comforted thousands in Calcutta who were abandoned by society. Theory goes that these people did great things because they were simply great people determined by fate and fulfilling their destiny.



The Trait Theory

It has often been said, *"Great leaders are born, not made."* The *Trait Theory* takes this saying literally. If you have the ability to lead, you were born with it, with no way to learning those skills. This theory expands on the Great Man Theory by defining what makes great leaders "great."

Today, we recognize that true leadership seems to come from a combination of both theories – and more. As we have seen, there are wide varieties of leadership qualities. Everyone has some ability in at least one or more of these areas. This means that under the right circumstances, anyone can rise to a leadership role and be successful based on the leadership style that best matches their personality, if they know how to use that ability to properly address the situation at hand. Other leadership skills can indeed be learned, developed, and mastered.

Transformational Leadership

In 1978, James MacGregor Burns introduced the idea of transformational leadership as he researched political leaders. Burns theorized that "transformational leadership" is actually a process where leaders interact with their followers and inspire each other to advance together. His characteristics and behaviors demonstrated the differences between "management" and "leadership." People and organizations are transformed due to the leadership style and abilities of the leader, who is able to convey a vision and guide the transformation.

Bernard M. Bass, in 1985, added to Burns' transformational leadership theory by shifting the focus to the followers. It is not the individual traits and vision of the leader that matter as much as it is their ability to influence the feelings, attitudes, and commitment of their followers. If people feel they can trust a leader (or better yet, if they admire a leader who can stimulate a sense of loyalty and respect) they will go beyond what was originally expected of them, do so happily. As a result, productivity and unity increase. The followers are transformed by a charismatic, motivational leader.

Summary

Through all of the studies, we have seen that there are a variety of attributes and abilities associated with leadership, and these vary from leader to leader. Some leaders are great orators, others great writers. Some leaders are very quiet, but the force of their logic or passion wins the day. The difference between a good leader and a great leader is partly the number of leadership skills they have developed. The other part is their ability to apply those skills properly to those who would follow. We will address these issues in the next section.

Estimated Time	10 minutes
Topic Objective	To define and explain the three leadership theories.
Topic Summary	The Great Man, Trait, and Transformation Leadership theories.
Materials Required	Flipchart and markers.
Planning Checklist	At the beginning of each discussion, write the title of the theory under discussion at the top of the flipchart page.
Recommended Activity	<ul style="list-style-type: none"> • The Great Man Theory: Ask the participants to define it and write their answers on the paper, then ask for examples of great leaders not already given. Why is this theory now discredited? Post the results on the wall. • The Trait Theory: Ask the participants to define it and write their answers on the paper, then ask for examples of great leadership traits that people seem to be born with. Why is this theory now discredited? Post the results on the wall. • The Transformation Leadership Theory: Ask the participants to define it and write their answers on the paper then draw a line down the middle and put the words “Management” and “Leadership” on either side of the line. Ask for a discussion on the differences between the two. Post the results on the wall.
Delivery Tips	This activity can be performed in small or large groups.
Review Questions	What are the three leadership theories?

Practical Illustration



Julie and Mindy had worked side by side for over five years. They chatted between projects and took lunch breaks together. When the company restructured, Julie was given a management position and Mindy became her subordinate. Mindy felt that it was unfair that she now had to take instructions from Julie and her negative attitude caused the department to lose productivity. Julie understood that it would take time to earn back Mindy's respect. She kept a positive attitude when working with Mindy and always kept Mindy informed of things that were relevant to Mindy's job. She assigned tasks to Mindy that she knew Mindy could accomplish and she gave appropriate feedback when work was delivered. Julie took responsibility for her decisions and didn't blame others when things went wrong. Over time, she gained Mindy's respect and the department's productivity soared.

Module Two: Review Questions

1.) Which of these statements about the evolution of leadership is true?

- a) As long as there have been leaders, it has been impossible to determine how and why they were successful
- b) Leadership itself has evolved, and our understanding of it has
- c) It is important to understand why very different leadership styles can be effective
- d) It is important to understand that not everyone has leadership potential within them

It is important to understand why very different leadership styles can be effective, why the same leadership techniques will not work in every situation, and which leadership style fits your personality best

2.) What is the mark of a true leader?

- a) The position held
- b) The title held
- c) How many people need to be lead
- d) How many people are willing to follow them

The mark of a true leader is not a position or title held, but it is how many people are willing to follow them

3.) Which of these is not a characteristic of a leader outlined by the Santa Clara University and the Tom Peters group?

- a) Honest
- b) Imaginative
- c) Straightforward
- d) Closed-minded

A closed-minded person will not be a good leader

4.) Which of these is a leadership principle of the United States Army?

- a) Ensure the task is understood, supervised, and accomplished
- b) Seek to improve others, not yourself
- c) Keep your superiors informed
- d) Seek responsibility and take responsibility for others' actions

The United States Army offers 11 Leadership Principles: Answer a is not one of them.

5.) Why do the United States Army leadership principles not address what to do or say in any given situation?

- a) There would be too many variables. The list would be too long and complicated
- b) Because there is a real formula for being a leader that is taught at higher ranks
- c) Leadership cannot be taught. It can only be learned through personal experience
- d) Leadership must come from within and it is based on your personality

There is no real formula to being a leader. Leadership must come from within and it is based on your personality

6.) Which of these categories have leaders typically belonged to in the past?

- a) Police
- b) Religion
- c) Family
- d) School system

Historical Leaders were either Political, Military, Religious

7.) Which of these statements is not true about the military leader, Sun Tzu?

- a) He wrote the Art of War
- b) His book is about how to use armies by any means necessary
- c) He was a great military leader
- d) His book focuses more on wise political policies and strategies to prevent war

Sun Tzu was a military general in China from 500 B.C. He wrote the Art of War, and although he was a great military leader, his book is actually about how to *not* use armies except as a last resort, focusing more on wise political policies and strategies to prevent war.

8.) With the rise of the Industrial Revolution, what new kind of leader emerged?

- a) Economic
- b) Military
- c) Political
- d) Family

Modern Leadership: Economic, Scientific

9.) Which theory takes the phrase “Great men are born, not made” literally?

- a) The Great Man Theory
- b) The Generational Theory
- c) The Trait Theory
- d) The Leadership Principle Theory

It has often been said, “*Great leaders are born, not made.*” The *Trait Theory* takes this saying literally.

10) Which of these is the difference between a good leader and a great leader?

- a) The amount of political clout he or she has
- b) Writing ability
- c) Military tactical thinking
- d) The number of leadership skills they have developed

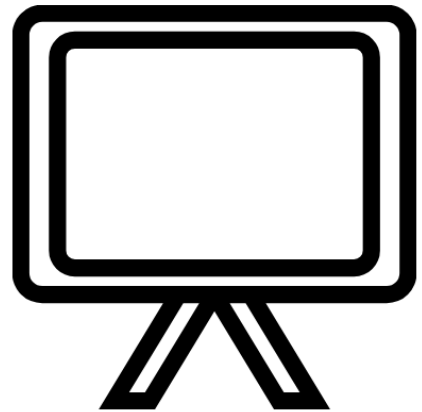
The difference between a good leader and a great leader is partly the number of leadership skills they have developed

PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.



Module Two: The Evolution of Leadership

Leadership itself has not evolved, but our understanding of it has. It is important to understand why very different leadership styles can be effective, why the same leadership techniques will not work in every situation, and which leadership style fits your personality best.

*Do not repeat the tactics which have gained you one victory,
but let your methods be regulated by the infinite variety of circumstances.*

Sun Tzu

Defining Leadership

- Establish direction
- Influence
- Motivate
- Responsible



Characteristics of a Leader

- Honest
- Inspiring
- Broad-minded
- Intelligent
- Imaginative



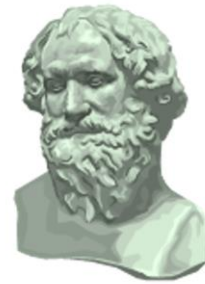
Leadership Principles

- Know yourself and seek self-improvement
- Set the example
- Develop a sense of responsibility in your subordinates



A Brief History of Leadership

- Historical Leaders: Political, Military, Religious
- Modern Leaders: Economic, Scientific



Three Theories of Leadership

- The Great Man Theory
- The Trait Theory
- Transformational Leadership



Practical Illustration

Julie and Mindy were co-workers

Now Mindy is Julie's subordinate



Module Two: Review Questions

1. Which of these statements about the evolution of leadership is true?
 - a) As long as there have been leaders, it has been impossible to determine how and why they were successful
 - b) Leadership itself has evolved, and our understanding of it has
 - c) It is important to understand why very different leadership styles can be effective
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2. What is the mark of a true leader?
 - a) The position held
 - b) The title held
 - c) How many people need to be lead
 - d) How many people are willing to follow them

Module Two: Review Questions

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Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Leadership and Influence

Quick Reference Sheet



Characteristics of a Leader

The mark of a true leader is not a position or title held, but how many people are willing to follow him or her. Santa Clara University and the Tom Peters group outline the following leadership characteristics:

- Honest
- Competent
- Forward-looking
- Inspiring
- Intelligent
- Fair-minded
- Broad-minded
- Courageous
- Straightforward
- Imaginative

The Art of Persuasion

Aristotle identified three important factors: ethos, pathos, and logos.

- **Ethos** (credibility) persuades people using character.
- **Pathos** (emotional) persuades people by appealing to their emotions.
- **Logos** (logical) persuades people by means persuading by appealing to their intellect.

Of the three Ethos must always come first. Ideally, you want to appeal to Pathos, back your arguments up with Logos, and never lose Ethos.

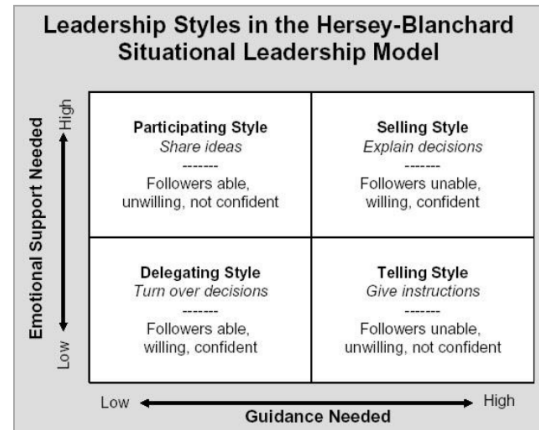
Kouzes and Posner

- **Model the Way:** You must lead by example. You can't come into work 10 minutes late every day if you want your employees to arrive on time.
- **Inspire a Shared Vision:** If you capture the imagination, you will inspire creative thought and increase loyalty. The vision doesn't need to be grandiose, but it needs to be communicated effectively for others to adopt it as one of their own.
- **Challenge the Process:** Don't continue doing something just because "We've always done it that way." Situations change, and sometimes a policy or procedure never worked well in the first place. Think outside the box.
- **Enable Others to Act:** Truly empower people to act on their own within their level of authority. The famed Ritz-Carlton hotel empowers every employee at all levels by allowing them to spend up to \$2,000, making any single guest satisfied.
- **Encourage the Heart:** A positive attitude is infectious. If the leader appears passionate or excited about the vision, others will catch the enthusiasm as well.

Situational Leadership

The Situational Leadership model addresses four types of leadership styles:

- Telling
- Selling
- Participating
- Delegating



Creating an Action Plan

Set Leadership Goals: In leadership, as in life, you will never come to the end of your learning, but you want to rank in priority those qualities you want to develop.

Address the Goals: Determine how you will accomplish your goals. Do you feel you need to learn more about teamwork so you can better lead a team? Join a team sport. Do you want to communicate better? Take a creative writing class or join Toastmasters and get some public speaking experience. Toastmasters are also great if you are shy and want to feel more comfortable in social situations.

Seek Inspiration: Learn about a variety of leaders, including their approach to dealing with challenges. Read books and conduct research on the internet or at libraries.

Choose a Role Model: Based on your research, choose a role model that fits your personality. You might choose a dynamic leader like Teddy Roosevelt, or an intellectual leader like Albert Schweitzer or Albert Einstein. Read several biographies and find videos of their life.

Seek Experience: Take a leadership role on a social group or club. Gain experience working with people on many levels.

Create a Personal Mission Statement: Imagine your legacy. How do you want to be remembered? What do you want people to think of you? What type of leader are you determined to be? Write a statement that defines who you will become.

SMART Goals

Specific: The vision itself is general while the goals are specific targets to be met.

Measurable: Goals must be measurable in terms of progress and attainment.

Attainable: Clearly, a goal which cannot be met is not a goal, it is an ideal.

Realistic: A goal may be attainable, but not with the resources at hand.

Timely: All goals need to be accomplished within a given time frame.

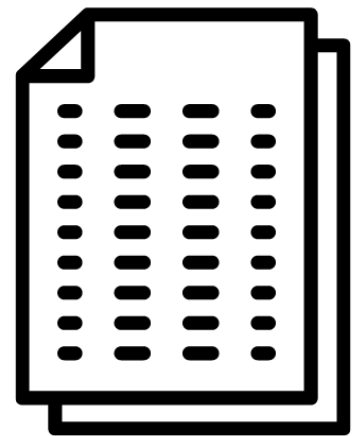
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Goal Card

Leader to emulate: _____

Leadership traits to develop:

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

Icebreaker: Find the Leader

PURPOSE

To help participants get to know each other.

MATERIALS REQUIRED

Enough chairs for all participants minus one, arranged in a circle.

ACTIVITY

Identify the person in the group whose birthday is closest to today's date. Identify that person as Spot and ask them to leave the room. Then, have the remaining participants choose a leader from the circle. Explain that when Spot returns to the room, they will have three guesses to name the leader. The group's job is to ensure that their leader stays a secret. Bring Spot back to the room and give him/her three chances to identify the leader. If they succeed, the leader will become the new Spot. If they fail, they will stay as Spot for another round.

TIPS

1. This activity works best with a group of 10-20 participants.
2. No one should be Spot for more than three rounds.

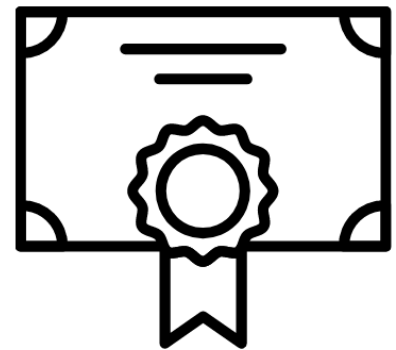
DEBRIEFING POINTS

3. How did you keep the leader a secret?
4. How did Spot guess the leader?
5. How difficult was it to be Spot?
6. How difficult was it to be the leader?
7. What can we take away from this exercise?

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Leadership and Influence*

Awarded this _____ day of _____, 20____

Presenter Name and Title
