CHAIR LEADERSHIP DEVELOPMENT PROGRAM

DAY ONE

April 23, 2019
Clint Sidle & Chet Warzynski
Introduction
The Academic Department Chair plays an extremely challenging role in today’s college or university. This individual is largely responsible for leading the single most important resource of any college—the faculty. In addition, the staffing, budget, and facilities of the modern academic department comprise assets that make it larger than many small businesses.

This comprehensive program is designed to help current and future department chairs and other academic leaders critically examine the role of the department chair and develop the knowledge, skills, and abilities for leading and managing an academic department. Participants will learn how to become more effective and productive in running an academic department and will discover ways to engage, develop, and lead others.

Program Goals
The objectives of this program are to:

1. Define and analyze the role and responsibilities of department chairs.

2. Determine the traits, competencies, and capabilities required to implement the role and responsibilities successfully.

3. Examine and practice techniques and tools for setting direction, supervising your office staff, communicating with individuals and groups, conducting effective meetings, building teams, appraising and coaching performance, and negotiating and resolving conflict.

4. Provide chairs an opportunity away from daily responsibilities to reflect with colleagues on the diverse challenges they face, and share best practices and techniques for meeting those challenges.

Learning Outcomes

- Enhanced leadership and interpersonal communication skills for increasing personal influence, resolving conflict, negotiating, and giving and receiving feedback effectively.

- Greater team effectiveness through understanding how to build strong, cohesive departments and teams that work well together.

- Understanding the dynamics of change at an organizational and system levels: how to embrace it, design it, and guide it effectively.

- Development of a network of chairs from other CUNY colleges, and increased awareness of options and resources available to chairs in performing their role.

- Increased effectiveness in responding to the needs/expectations of department colleagues as well as the college administration.
Program Agenda

Program participants will engage in a variety of practice and skill-building exercises that will assist them in leading and managing an academic department. The program consists of a three-day session focusing on: (1) the role and responsibilities of the department chair; (2) faculty development; (3) change management and team building; and (4) leading a department within the CUNY environment.

**DAY 1 – THE ROLE AND RESPONSIBILITIES OF THE DEPARTMENT CHAIR**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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| 9:00 a.m. | Introductions and Expectations  
Program Overview  
Management and Leadership Challenges at CUNY Colleges |
| 9:45 a.m. | The Role and Responsibilities of the Chair  
Interactive Exercise: Open Space |
| 10:30 a.m. | Break |
| 10:45 a.m. | Leading and Managing Your Department and Office Staff: An Action Research Framework for Maximizing Departmental Potential  
Exercise: Negotiating the Conditions of Your Chair-ship  
Case Study on Leading Up |
| Noon    | Lunch |
| 1:00 p.m. | Identification of Leadership Styles  
Exercise on The Leadership Wheel |
| 3:00 p.m. | Break |
| 3:15 p.m. | Introduction to Leadership Styles: the Myers-Briggs Type Indicator (MBTI)  
- Theory of Psychological Types  
- Applications of MBTI for Communication, Time Management, Problem-Solving, Decision-Making, and Conflict and Change Management |
| 4:30 p.m. | Closing Comments  
Homework Assignment: Managing Personal Time |
| 5:00 p.m. | Evaluation and Adjournment |
# Day 2 – Developing Your Faculty: Coaching and Appraising

<table>
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<tr>
<th>Time</th>
<th>Activity</th>
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| 9:00 a.m. | Review Lessons from Day 1 and Agenda for Day 2  
Review Homework Assignment: Managing Personal Time |
| 9:15 a.m. | Using Dialogue and Interest Based Negotiation to Coach and Mentor  
Faculty and Resolve Conflict |
|        | Case Study Applications: Managing Difficult Faculty – The Case of Xavier |
| 10:30 a.m. | Break |
| 10:45 | Tools and Techniques for Handling Faculty and Student Complaints |
| Noon | Lunch |
| 1:00 p.m. | Exercise on Implicit Bias: Privilege Walk – Assessing Diversity, Inclusion  
and Micro-Aggression |
| 1:30 | Developing Emotional Intelligence  
Implicit Bias and Micro-Aggression Case Study: Meet Me at Starbucks |
|        | Succession Planning: Grooming the Next Chair |
| 3:00 p.m. | Break |
| 3:15 p.m. | Conducting Performance Appraisal and Succession Planning  
The Case of the Faculty Bully |
|        | Chair Scholarship Productivity Group Discussion |
| 4:30 p.m. | Closing Comments  
Homework Assignment: Developing a Strategic Plan |
| 5:00 p.m. | Evaluation and Adjournment |

# Day 3 – Leading for Change: Developing Your Department

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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| 9:00 a.m. | Review Lessons from Day 2 and Agenda for Day 3  
Review Homework Assignment: Developing a Strategic Plan |
| 9:30 a.m. | Strategies for Engaging Faculty in Team Building and Strategic Planning |
• Future Search
• Open Space
• Carousel Technique
• Learning Panels
• Action Learning Groups

10:30 a.m.  Break

10:45 a.m.  Team Building Exercise: Developing a Culture of Realistic and Measureable Expectations

Noon  Lunch

1:00 p.m.  Models for Leading Change
Simulation: Developing a Strategic Plan for Your Department

3:00 p.m.  Break

3:15 p.m.  Leadership Feedback from Other Colleagues
Creating a Personal Development Plan for Future Growth
CUNY Resources for Department Chairs

4:30 p.m.  Follow Up: Building and Maintaining a Support Network

5:00 p.m.  Evaluation and Adjournment

Biographical Information

C. CLINTON SIDLE

Clint Sidle is a consultant in leadership and organizational development and a lecturer in leadership development at Cornell University. His previous positions included Director of the prestigious Roy H. Park Leadership Fellows Program in the Johnson Graduate School of Management at Cornell University. Clint is a widely sought as a keynote speaker and consultant in leadership development, executive coaching, and managing change.

His Park Leadership Fellows Program has been recognized as a unique and powerful contribution to graduate management education, and his design for a leadership development program at Cornell has won national recognition. His developmental approach is based on a unique experiential learning model outlined in his book The Leadership Wheel: Five Steps to Achieving Individual and Organizational Greatness. He elaborates on the inner aspect of
leadership development in his most recent book *This Hungry Spirit: Your Need for Basic Goodness*.

Clint also has over two decades of experience in facilitating organizational and strategic change efforts for business and non-profit organizations. Clint’s approach to managing change is a powerful combination of leadership development, team building, and large group intervention techniques in facilitating and deepening the impact of the process. He describes many of his methods in his first book *High Impact Tools and Activities for Strategic Planning* published in 1997 by McGraw Hill.

His most recent consulting clients in the private sector include Meredith Corporation, Borg Warner, Corning Inc., Kellogg’s Inc., Wellington Group, Citigroup, and Grupo Generali. In higher education they include the State University of New York, City University of New York, Drexel University, Bucknell University, Cornell University, and Ithaca College. His other non-profit clients include the American Red Cross, International Outward Bound and many other non-profit and professional management associations. More information is available at: www.clintsidle.org.

CHESTER C. WARZYNSKI

Chester (Chet) Warzynski specializes in developing capabilities to strengthen individual and organizational performance in colleges and universities. With more than 25 years of successful experience in providing leadership and organizational development, he has worked with leaders to strengthen the performance of numerous companies and universities, including Exxon, Dow Jones, Cornell University, Georgia Tech, Penn State, Carnegie Mellon University, the University of Arizona, and the City and State University Systems of New York.

In his last position he was senior adviser of strategic financial initiatives at Carnegie Mellon University. Previous positions included executive director of organizational development and adjunct professor in the School of Public at the Georgia Institute of Technology, director of organizational development services and lecturer in the School of Industrial and Labor Relations at Cornell University, and director of corporate planning, training, and new venture development at Dow Jones, Inc.

Warzynski completed his undergraduate and graduate studies in sociology at Southern Illinois University and the University of Western Ontario, and post-graduate and doctoral studies in educational planning at the University of Toronto and Florida International University.

He has published on leadership in higher education, strategic planning, organizational development, reengineering universities, project management, and sustainable development. His current research is on leadership and innovation. He has served on the boards of the National Consortium for Continuous Improvement in Higher Education, Seventh Art Group, and Red Cross, and has been a member of the International Leadership Association and the Academy of Management.
ASSUMPTIONS VS FACTS: IMPLICATIONS FOR DEPARTMENT CHAIRS

Within your group of three, guess your answers to the following questions about your partners. This is not a conversation, just make your best guess and write your answer in the space provided. When everyone is finished, share the “true” answers with each other. Determine how many answers you guessed correctly.

<table>
<thead>
<tr>
<th>True Information</th>
<th>Your Guess</th>
<th>Questions</th>
<th>Your Guess</th>
<th>True Information</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>What is his/her hobbies?</td>
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<td></td>
<td></td>
<td>What type of music does he/she like?</td>
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<tr>
<td></td>
<td></td>
<td>Their favorite food?</td>
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<td></td>
<td>What is their perfect car?</td>
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<td>Their ideal vacation?</td>
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<td></td>
<td></td>
<td>A hot time on a Saturday night?</td>
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<tr>
<td></td>
<td></td>
<td>Their favorite leader?</td>
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PROGRAM NORMS AND GROUND RULES FOR LEARNING

FACILITATOR NORMS

- Participation
- Openness
- Sensitivity
- Experimentation
- Personal responsibility

GROUP GROUND RULES

1.
2.
3.
4.
5.
THE CONTEXT OF LEADERSHIP

Noam Chomsky published an article on the responsibility of intellectuals in which he stated, “Intellectuals are in a position to expose the lies of governments, to analyze actions according to their causes and motives and often hidden intentions. In the Western world, at least, they have the power that comes from political liberty, from access to information and freedom of expression. For a privileged minority, Western democracy provides the leisure, the facilities, and the training to seek the truth lying hidden behind the veil of distortion and misrepresentation, ideology and class interest, through which the events of current history are presented to us.”

What are the major challenges and responsibilities faced by Department Chairs at CUNY?

<table>
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<tr>
<th>Institutional Challenges and Opportunities . . .</th>
<th>Responsibilities of Leaders . . .</th>
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</table>
Roles and Responsibilities of the Chair

This institution complies with all federal and state civil rights laws banning discrimination in private institutions of higher education. It will not discriminate against any person because of race, color, sex, pregnancy, religion, creed, national origin (including ancestry), citizenship status, physical or mental disability, age, marital status, sexual orientation, gender identity and expression, veteran or military status (including special disabled veteran, Vietnam era veteran, or recently separated veteran), predisposing genetic characteristics, domestic violence victim status, or any other protected category under applicable local, state, or federal law. Further, its policy is to recruit, hire, retain, terminate, transfer, promote, compensate and distribute all benefits without regard to any such considerations.

The Chair will hold themselves personally responsible and accountable for their own successful job performance and the successful performance of their staff. Chairs are agents of the institution in their relationships with staff, faculty, students, alumni, and the general public; they are responsible for maintaining the highest standards of the organization in those relationships.

Roles and Responsibilities of Supervisors:
The roles and responsibilities of a chair include building an effective team; making sure people are working effectively together; maintaining staff productivity and morale; creating a productive work environment; monitoring and managing individual and team performance; and initiating continuous improvement.

1. Improve quality of education and scholarship.
2. Maintain a safe and healthy workplace for faculty, staff, and students.
3. Recruit and retain excellent and diverse faculty and staff.
4. Set and communicate performance expectations, work standards and work priorities.
5. Understand and support the organization’s policies and practices.
6. Inform employees under your mandate of policies and procedures that affect their work and their lives.
7. Give staff honest and timely feedback about work performance, developing improvement plans and, when necessary or desirable, supporting the transition of faculty and staff to other jobs either inside the university or beyond.
8. Conduct formal performance dialogue at least once annually.
9. Provide opportunities for learning/training/development of faculty and staff to meet performance expectations.
10. Resolve workplace issues and complaints quickly, working with Human Resources.
11. Take corrective action to ensure effective and productive work environment.
12. Encourage faculty and staff to take risks and be creative, generating fresh ideas and innovative practices that enhance the institution’s ability to compete with peer organizations.
13. Respect and support the importance of balancing work and family responsibilities.
14. Facilitate the career growth of faculty and staff; institute other reward and incentive strategies that recognize and value work performance.
15. Understand employment law and take appropriate action if you think a law may have been violated.
FOUR LEVELS OF THE LEADERSHIP EXPERIENCE

**System Mastery**
(leading and managing change)

**Team Mastery**
(developing synergy and high performance)

**Challenge**
(setting meaningful stretch goals)

**Interpersonal Mastery**
(conducting difficult conversations)

**Empowerment**
(inspiring and supporting action)

**Personal Mastery**
(understanding and developing self)
FIVE STEPS TO LEADERSHIP DEVELOPMENT

1. Have a model of chair leadership development

2. Get feedback on that model

3. Evaluate the feedback

4. Make a plan

5. Work the plan
EXPERIENTIAL LEARNING

David A. Kolb (with Roger Fry) created his famous model out of four elements: concrete experience, observation and reflection, the formation of abstract concepts and testing in new situations. He represented these in the following experiential learning cycle:

Kolb and Fry (1975) argue that the learning cycle can begin at any one of the four points - and that it should really be approached as a continuous spiral. However, it is suggested that the learning process often begins with a person carrying out a particular action and then seeing the effect of the action in this situation. Following this, the second step is to understand these effects in the particular instance so that if the same action was taken in the same circumstances it would be possible to anticipate what would follow from the action. In this pattern, the third step involves understanding the general principle under which the particular instance falls.

Action Learning Process

1. Experiencing/Doing: What did you do?
2. Assessing/Feedback: What were the results?
3. Reflecting: Why does it matter?
4. Planning/ Theory: What will you do next?
DISCOVERING LEADERSHIP

1. What are the personal qualities (traits) of effective leaders?

2. What competencies (skills) are required for effective leadership?

3. What actions do effective leaders take to lead their organizations?
**PERSONAL DEFINITION OF CHAIR LEADERSHIP**

My personal definition of chair leadership: ________________________________

________________________________

________________________________

________________________________

________________________________

________________________________

________________________________

________________________________

Strengths

Challenges
SOME LEADERSHIP DEFINITIONS

US Military

The Six C’s

Courage – willingness to take risks
Candor – openness and transparency
Commitment – passionate about the purpose served
Compassion – caring for the well-being and development of others
Competence – general expertise and mastery of profession
Character – authentic, trustworthy, and values driven

The 3 ‘Knows’

Know your stuff
Know your self
Know your people

West Point Moto

Be – who are you as a person (self-understanding)?

Know – what are you good at (competency)?

Do – does your word match your deed (authenticity)?
SOME DEFINITIONS OF LEADERSHIP

"Leadership is a process whereby an individual influences a group of individuals to achieve a common goal." Northouse (2010, p 3)

"Leadership is a process of giving purpose (meaningful direction) to collective effort, and causing willing effort to be expended to achieve purpose.” Jacobs & Jaques (1990, p.281)

“Leadership is the ability to step outside the culture to start evolutionary change processes that are more adaptive.” Schein (1992)

“Leadership is the creation of a vision about a desired future state which seeks to enmesh all members of an organisation in its net.” Bryman (1986, p. 6)

“Leadership is the lifting of a man’s vision to higher sights, the raising of a man’s performance to a higher standard, the building of a man’s personality beyond its normal limitations.” Drucker, P. F. (1955)

“Leadership is an intangible quality with no clear definition. That's probably a good thing, because if the people who were being led knew the definition, they would hunt down their leaders and kill them.” Scott Adams, The Dilbert Principle (1996)

“The servant-leader is servant first…It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead…” (Greenleaf, 1970)

"Leadership is about articulating visions, embodying values, and creating the environment within which things can be accomplished.” (Richards & Engle, 1986)

“The superior leader gets things done with very little motion. He imparts instruction not through many words but through a few deeds. He keeps informed about everything but interferes hardly at all. He is a catalyst, and though things would not get done well if he weren't there, when they succeed he takes no credit. And because he takes no credit, credit never leaves him.” (Lao Tse, Tao Te Ching)

“Leadership is the art to of influencing and directing people in such a way that will win their obedience, confidence, respect and loyal cooperation in achieving common objectives.” (U. S. Air Force)

“Leadership is the ability of an individual to influence, motivate, and enable others to contribute toward the effectiveness and success of the organizations of which they are members.” (R. J. House)

“Transformational Leadership is a style of leadership that motivates through identification with the leader's vision: pulling rather than pushing others on.” (W. Bennis).
### MANAGEMENT VERSUS LEADERSHIP

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<tr>
<th>Accountability</th>
<th>Empowerment</th>
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Management vs. Leadership

<table>
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<tr>
<th>Categories</th>
<th>Management (transactional)</th>
<th>Leadership (transformational)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader’s source of power</td>
<td>Rank, position</td>
<td>Character, competence</td>
</tr>
<tr>
<td>Follower reaction</td>
<td>Compliance</td>
<td>Commitment</td>
</tr>
<tr>
<td>Time frame</td>
<td>Short-term</td>
<td>Long-term</td>
</tr>
<tr>
<td>Rewards</td>
<td>Pay, promotion, etc.</td>
<td>Pride, self-esteem, etc.</td>
</tr>
<tr>
<td>Supervision</td>
<td>Important</td>
<td>Less important</td>
</tr>
<tr>
<td>Counseling focus</td>
<td>Evaluation</td>
<td>Development</td>
</tr>
<tr>
<td>Where change occurs</td>
<td>Follower behavior</td>
<td>Follower attitude, values</td>
</tr>
<tr>
<td>Where “leadership” found</td>
<td>Leader’s behavior</td>
<td>Follower’s heart</td>
</tr>
</tbody>
</table>

Management vs. Leadership – Additional perspective

- Managers administer
- Managers maintain
- Managers supervise
- Managers take short-term view
- Managers control
- Managers ask how and when
- Managers do things right
- Leaders innovate
- Leaders challenge
- Leaders develop
- Leaders take long-term view
- Leaders inspire
- Leaders ask what and why
- Leaders do the right thing
TRANSACTIONAL VS. TRANSFORMATIONAL LEADERSHIP

Understanding Power and Influence

Five Potential Bases of Power

- **Legitimate**: formal, official, or positional authority
- **Reward**: authority to give raises, tenure, assignments, benefits, awards
- **Coercive**: authority to administer negative sanctions or withhold rewards
- **Expert**: knowledge, expertise, competence, performance
- **Referent**: strength of relationship based on trust and mutual respect

Four Possible Reactions to Power

- **Resistance**: refusal or reluctance
- **Compliance**: acceptance of influence involving social or material rewards or punishments – *go along*
- **Identification**: acceptance of influence due to source; imitation; emulation – *good idea*
- **Internalization**: acceptance due to intrinsic benefits; attitude and values change – *work hard for*
# BASES POWER AND POTENTIAL FOLLOWER REACTIONS

<table>
<thead>
<tr>
<th>Bases of Power</th>
<th>Internalize</th>
<th>Identify</th>
<th>Compliance</th>
<th>Resistance</th>
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</thead>
<tbody>
<tr>
<td>Referent</td>
<td>Likely</td>
<td>Likely</td>
<td>Possible</td>
<td>Possible*</td>
</tr>
<tr>
<td>Expert</td>
<td>Likely</td>
<td>Likely</td>
<td>Possible</td>
<td>Possible</td>
</tr>
<tr>
<td>Legitimate</td>
<td>Unlikely</td>
<td>Possible</td>
<td>Likely</td>
<td>Possible</td>
</tr>
<tr>
<td>Reward</td>
<td>Unlikely</td>
<td>Possible</td>
<td>Likely</td>
<td>Possible</td>
</tr>
<tr>
<td>Coercive</td>
<td>Very Likely</td>
<td>Unlikely</td>
<td>Likely</td>
<td><strong>Likely</strong></td>
</tr>
</tbody>
</table>
INFLUENCE AND STYLES OF LEADERSHIP

Transactional versus Transformational

Which results is higher

- Performance
- Innovation
- Learning
- Adaptability
SITUATIONAL LEADERSHIP

(Blanchard and Hershey)

When do you manage and when do you lead?

Leaders adapt their style based on the situation and readiness of followers in terms of

- Competence
- Commitment/Maturity
- Time frame
- Process routine
OTHER THEORIES AND MODELS OF LEADERSHIP

Representative theories and models of leadership

- Charismatic and Trait-based Leadership (Weber, Stogdill)
- Skill or Competency-based Leadership (Mumford, McClelland)
- Leadership Grid (Blake, Mouton)
- Contingency and Situational Leadership (Fiedler, Blanchard)
- Transformational and Transactional (Bass, Bennis, Avolio)
- Adaptive (Heifitz, Linsky)
- Servant (Greenleaf)
- Values-Based Leadership (Fairholm)
- Principle-centered (Covey)
- Authentic (George, Bennis)
- Distributive (Ancona, Senge)
- Meta leadership (Marcus, Ashkenazi)
- Tipping Point (Kim, Maugborne)
- Actor-Network (Latour, Callon, Law)
- Appreciative Leadership (Whitney, Trosten-Bloom, Rader)

A Few in More Detail

   - Neuroticism – tendency to be depressed, anxious, insecure, vulnerable and hostile
   - Extraversion – tendency to be sociable and assertive and to have positive energy
   - Openness – tendency to be informed, creative, insightful, and curious
   - Agreeableness – tendency to be accepting, conforming, trusting, and nurturing
   - Conscientiousness – tendency to be thorough, organized, controlled, dependable, and decisive

   - Self-awareness
   - Confidence
   - Self-regulation
   - Conscientiousness
   - Motivation
   - Empathy
   - Social skills
   - Communication
   - Conflict management

![Leadership Grid Diagram]


<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step one</td>
<td>Identify the type of problem</td>
<td>Technical: every day issues with common solutions; adaptive: challenging, new, uncommon situations</td>
</tr>
<tr>
<td>Step two</td>
<td>Focus attention</td>
<td>Get people to pay attention to key issues. Secure commitments from those who will help you sell the initiative. Engage those who have yet to climb on board with the change issue. Adopt the behavior you expect from others, and take responsibility for problems facing the organization</td>
</tr>
<tr>
<td>Step three</td>
<td>Frame the issues</td>
<td>Determine the time when issues must be presented to stakeholders, and focus on the opportunities such problems can provide. This is aided by employing the “discovery process” – stepping back and seeing the big picture</td>
</tr>
<tr>
<td>Step four</td>
<td>Secure ownership</td>
<td>Sustain the conditions through which stakeholders take responsibility for problem solving and better adapted to the politics, culture, and history of their situation. Place the work where it belongs. Challenge employees’ expectations</td>
</tr>
<tr>
<td>Step five</td>
<td>Manage stakeholder conflict and maintain stress</td>
<td>Stakeholders with different agendas need to be aligned to achieve a higher purpose, while confronting conflict resulting from stakeholders’ personal issue. Uphold the productive stress required for change to occur</td>
</tr>
<tr>
<td>Step six</td>
<td>Create a safe haven</td>
<td>Counterproductive measures need to be minimized by slowing pace of change and creating a secure place to discuss disparate perspectives</td>
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</table>
5. **Transformational and Transactional Leadership**

Transformational Leadership Factors: the 4 “I”s:

- **Idealized Influence**
  - Acting as strong role models
  - High standards of moral and ethical conduct
  - Making others want to follow the leader’s vision

- **Inspirational Motivation**
  - Communicating high expectations
  - Inspiring followers to commitment and engagement in shared vision
  - Using symbols and emotional appeals to focus group members to exceed self-interest

- **Intellectual Stimulation**
  - Stimulating followers to be creative and innovative
  - Challenging their own beliefs and valuing those of leader and organization
  - Supporting followers to try new approaches
  - Developing innovative ways of dealing with organization issues

- **Individualized Consideration**
  - Listening carefully to the needs of follower
  - Acting as coaches to assist followers in becoming fully actualized
  - Helping followers grow through personal challenges

CASE STUDY: APPLYING LEADERSHIP THEORIES AND METHODS
WHAT DO YOU HAVE GOING FOR YOU?

**Instructions:** You are the leader of a research or project team trying to achieve the goals indicated below. Identify the traits, skills, styles, and situational factors you would employ to influence the people on your team as well as other stakeholders connected to the project.

**Project Goal:** __________________________________________________________

If things started to go badly with the implementation of the project, how would you use your personal mastery (emotional intelligence and adaptive behavior) to stay the course, i.e., how would you deal with your feelings of anger, frustration, disappointment, etc.? Describe what you would do and why.
CASE STUDY: NEGOTIATING THE CONDITIONS OF YOUR CHAIR-SHIP

1. What conditions of your chair-ship are negotiable?

2. What leverage do you have with your supervisor to support your request?

3. Ways strategies have worked for you in the past in leading up?
1. How might you apply this approach to leading up with your supervisor or boss?

2. What other applications of this approach might be useful in performing your role?
LEADERS LEAD THROUGH ASKING AND ANSWERING QUESTIONS

These are questions we ask each other before, during, and sometimes after we work on something. That something can be as small as a couple-hour project or as big as something that takes a few weeks or more. Either way, it’s important to ask questions like this in order to make sure you’re doing work that matters.

- **Why are we doing this?** Ever find yourself working on something but you don’t know why? Someone just told you to do this or that? It’s pretty common I think. It’s important to ask yourself (and others) why you’re working on this. What is this for? Who benefits? What’s the motivation behind it? Knowing the answers to these questions will help you better understand the work itself.

- **What problem are we solving?** What’s the problem? Are customers confused? Are we confused? Is something not clear enough? Was something not possible before? What problem are we solving here? Sometimes when you ask yourself this question you’ll find that you’re solving an imaginary problem. That’s when it’s time to stop and reevaluate what the hell you’re doing.

- **Is this actually useful?** Are we making something useful or are we just making something? It’s easy to confuse enthusiasm with usefulness. Sometimes it’s fine to play a bit and build something that’s cool, but it’s worth asking yourself if it’s useful too. Cool wears off, useful never does.

- **Are we adding value?** Adding something is easy, adding value is harder. Is this thing I’m working on actually making the product more valuable for people? Can they get more out of it than they did before? There’s a fine line between adding value and subtracting value. Sometimes adding is subtracting. Too much catsup can ruin the fries. Value is about balance.

- **Will this change behavior?** Developers have a tendency to add stats to a screen just because they can. Counts, totals, sums, averages. Numbers can look cool, but do they change behavior? Does it matter if someone knows there are 38 of these instead of 42? Does it matter that someone knows it took 0.08 seconds instead of 0.02? Sometimes it might, but it’s important to constantly ask yourself: Will knowing this information change someone’s behavior? Can they do something useful with this information? Will they make a better decision because of this information? If not, pull it out of the interface. Data without purpose is noise.

- **Is there an easier way?** There are lots of ways to do things, but for simplicity’s sake let’s say there are two primary ways: The easier way and the harder way. The easier way takes 1 unit of time. The harder way takes 10 units of time. Whenever you’re working on the harder way you should ask yourself is there an easier way? You’ll often find that the easier way is more than good enough for now. Most people’s problems are pretty simple — we just imagine they are hard.

- **What’s the opportunity cost?** What can’t we do because we’re doing this? This is especially important for smaller companies that are more resource constrained. Limited time makes prioritization more important. If we work on feature A, can we still do Feature B and C before April? If not, would we rather have B and C instead of A? Is A really worth the opportunity cost? Ask this all the time.

- **Is it really worth it?** This one should come up all the time. Is what we’re doing really worth it? Is this meeting worth pulling six people off their work for an hour? Is it worth pulling an all-nighter tonight or could we just finish it up tomorrow? Is it worth getting all stressed out over a press release from a competitor? Is it really worth spending $1000/week on Google Ad words? Is it really worth...?
TEN PRINCIPLES FOR LEADING UP*

1. **Take Responsibility:** You must recognize that you are solely responsible for the quality of the relationship with your boss and have the power to influence it. If you are not getting what you want, ask for it.

2. **Know your Boss (and yourself):** To manage your boss, you need to know who he or she is – their style, their motivations, and their priorities. You also need to know the same about yourself so you can adapt your agenda and communication style to meet his or her needs while also meeting yours.

3. **Help your Boss Succeed:** Whether your boss gives a damn about you or not, commit yourself to your boss’s success. Whatever you do for them, make sure it is thoroughly analyzed and fully developed.

4. **Make Sure Expectations Are Clear:** There is no greater source of tension or confusion as when expectations are not clear. Make sure you understand the performance expectations, and if you don’t then ask. Also make sure you discuss them regularly.

5. **Keep your Boss Informed:** Superiors want to know what is going on and do not like surprises. An open flow of information is essential to building and maintaining confidence and trust.

6. **Develop a Network of Influence:** Avoid becoming over dependent on your boss. Build relationships with a number of your superiors so you can draw on their influence to help you when necessary.

7. **Serve the Mission:** When your boss rejects your appeals or offers little guidance, make your decisions by focusing on the mission of the organization. Decisions must transcend personal resentments that might otherwise get in the way of the ultimate aim.

8. **Build a Career Contract:** You have a right to receive certain things from your boss including feedback, coaching, career counseling, and knowing how things work. Often the best approach is to simply ask questions you have about your development and the big picture.

9. **Learn to Push Back:** To preserve your self-esteem and integrity, you must learn to push back regardless of how difficult it might be. Private criticism coupled with public support will ensure your voice is heard. Set the ground rules of communication early.

10. **Maintain Respect:** Disdain and contempt for your boss will be returned in kind. Never treat your boss like an old fool, even if he or she is. And never upstage your boss -- it will only shorten your leash.

1. **Assume the best**: remember everyone wants to optimize their performance and be a valued contributor.

2. **Set clear expectations and goals**: establish clear and specific behavior (relationships, cultural values and norms) and job performance outcomes (skills, competencies, and goals) in the context of the overall vision of the organization. Everyone wants to know the expectations, have a clear and meaningful challenge, and see how it fits into the overall picture.

3. **Give people an opportunity to perform**: observe performance and meet regularly to review progress. Give them latitude and resist the urge to micromanage.

4. **Let them know how they are doing**: give feedback on performance against expectations early and frequently including praise, recognition, and constructive feedback. Remember to *use dialogue skills from session 3* and that the only reason to give feedback is to provide an employee with every opportunity to develop professionally.

5. **Partner and empower for growth**: assist them in their development through teaching, coaching, training, taking on new challenges, providing access to appropriate resources, and preparing and following through on a development plan.

6. **Maintain accountability**: make sure you follow through on monitoring and discussing progress as well as taking personal responsibility for building the relationship, growing employee confidence, and improving their performance.
THE MYERS-BRIGGS TYPE INDICATOR (MBTI)

ABOUT THE MBTI

- *It is a self-report instrument:* the results of the MBTI reflect your perceptions of yourself. You are the decision-maker.

- *The MBTI is non-judgmental:* each of the 8 preferences and 16 personality types are descriptive of potential strengths and contributions.

- *The MBTI is an indicator of preferences:* there are no correct or incorrect answers.

- *The MBTI does not measure, it sorts:* high preference scores do not imply strength or competence in the use of a preference; rather, they imply personal choice or preference.

- *The MBTI is well researched:* there has been considerable research conducted on the MBTI. There are thousands of dissertations and masters theses and articles related to the MBTI.

- *The MBTI is popular:* it has been estimated that more than 50 million people have taken the MBTI for personal and professional development. The MBTI is used extensively in leadership development, team building, and counseling.

MBTI PREFERENCE SCALES

**Energy**
- Extraversion ................................................................. Introversion

**Data**
- Sensing ................................................................. INtuition

**Decision**
- Thinking ................................................................. Feeling

**Action**
- Judging ................................................................. Perceiving
FOCUS AND SOURCE OF ENERGY
(Direction and sources of energy)

<table>
<thead>
<tr>
<th>Extraverting (E) (70%)</th>
<th>Introverting (I) (30%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stimulated by outer world</td>
<td>Stimulated by inner world</td>
</tr>
<tr>
<td>People, events, things</td>
<td>Ideas, thoughts, meanings</td>
</tr>
<tr>
<td>Gregarious</td>
<td>Quiet</td>
</tr>
<tr>
<td>Gets ideas by talking</td>
<td>Gets ideas by thinking</td>
</tr>
<tr>
<td>Many acquaintances</td>
<td>Few intimate friendships</td>
</tr>
<tr>
<td>Expressive</td>
<td>Reflective</td>
</tr>
<tr>
<td>Silence is difficult</td>
<td>Silence is a blessing</td>
</tr>
<tr>
<td>Impatient</td>
<td>Patient</td>
</tr>
<tr>
<td>Breadth</td>
<td>Depth</td>
</tr>
<tr>
<td>Public</td>
<td>Private</td>
</tr>
<tr>
<td>Talk, think and feel</td>
<td>Think, feel and talk</td>
</tr>
</tbody>
</table>

PERCEIVING FUNCTION
(Ways of gathering data)

<table>
<thead>
<tr>
<th>Sensing (S) (68%)</th>
<th>Intuition (N) (32%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Takes data in by 5 senses</td>
<td>Takes data in by 6th sense</td>
</tr>
<tr>
<td>Facts</td>
<td>Ideas</td>
</tr>
<tr>
<td>Details</td>
<td>Big Picture</td>
</tr>
<tr>
<td>Action-oriented</td>
<td>Idea-oriented</td>
</tr>
<tr>
<td>Present</td>
<td>Future</td>
</tr>
<tr>
<td>Concrete</td>
<td>Abstract</td>
</tr>
<tr>
<td>Specific</td>
<td>General</td>
</tr>
<tr>
<td>Practical</td>
<td>Imaginative</td>
</tr>
<tr>
<td>Focused on reality</td>
<td>Focused on possibilities</td>
</tr>
<tr>
<td>Inductive</td>
<td>Deductive</td>
</tr>
<tr>
<td>Trusts experience</td>
<td>Trusts theory</td>
</tr>
</tbody>
</table>
### JUDGING FUNCTION
(How we evaluate and make decisions)

<table>
<thead>
<tr>
<th>Thinking (T) (53%)</th>
<th>Feeling (F) (47%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective – rational</td>
<td>Subjective – values based</td>
</tr>
<tr>
<td>Logical</td>
<td>Moral</td>
</tr>
<tr>
<td>Impersonal</td>
<td>Personal</td>
</tr>
<tr>
<td>Trusts logic</td>
<td>Trusts personal reactions</td>
</tr>
<tr>
<td>Clarity</td>
<td>Harmony</td>
</tr>
<tr>
<td>Analyzes plans</td>
<td>Understands people</td>
</tr>
<tr>
<td>Tough</td>
<td>Sensitive</td>
</tr>
<tr>
<td>Justice, truth, consistency</td>
<td>Kindness, trust, compassion</td>
</tr>
<tr>
<td>Sympathizes</td>
<td>Empathizes</td>
</tr>
<tr>
<td>Impact on business</td>
<td>Impact on people</td>
</tr>
</tbody>
</table>

### ATTITUDE FUNCTION
(Ways of taking action with the environment)

<table>
<thead>
<tr>
<th>Judging (J) (58%)</th>
<th>Perceiving (P) (42%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned</td>
<td>Flexible</td>
</tr>
<tr>
<td>Closure</td>
<td>Open-ended</td>
</tr>
<tr>
<td>Decisive</td>
<td>Curious</td>
</tr>
<tr>
<td>Anticipate</td>
<td>React</td>
</tr>
<tr>
<td>Order</td>
<td>Options</td>
</tr>
<tr>
<td>Likes structure</td>
<td>Goes with the flow</td>
</tr>
<tr>
<td>Deadline conscious</td>
<td>Spontaneous</td>
</tr>
<tr>
<td>Control events</td>
<td>Adapt to events</td>
</tr>
<tr>
<td>Schedules and plans</td>
<td>Energized by deadlines</td>
</tr>
<tr>
<td>Doesn't like uncertainty</td>
<td>Likes uncertainty</td>
</tr>
<tr>
<td>I plan</td>
<td>I do</td>
</tr>
<tr>
<td>Makes lists</td>
<td>Loses lists</td>
</tr>
</tbody>
</table>
**LEADERSHIP GROUP TYPE AND POPULATION DATA**

<table>
<thead>
<tr>
<th>Explorer</th>
<th>N</th>
<th>Driver</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTJ 1%</td>
<td>ENTP 5%</td>
<td>ENTJ 5%</td>
</tr>
<tr>
<td>compelling vision, self-confident, strategic, creative, drive</td>
<td>alert to next move, analytical, impatient, not a builder</td>
<td>drive to lead, harnesses people, good judge, too many projects, restless</td>
</tr>
<tr>
<td>INFJ 1%</td>
<td>INFP 1%</td>
<td>ENFJ 5%</td>
</tr>
<tr>
<td>strong contributor, consistent, looks to future, enjoys problems, good at public relations</td>
<td>idealistic, prefers values, not goals, perfectionist, impatient with detail</td>
<td>good leader, charismatic, cooperative, organized, good follower</td>
</tr>
<tr>
<td>ISFJ 6%</td>
<td>ISFP 5%</td>
<td>ESFP 13%</td>
</tr>
<tr>
<td>service oriented, works hard, dependable, responsible, likes stability, down-to-earth</td>
<td>hedonic, impulsive, not a planner, spender, not saver, insubordinate</td>
<td>adept at selling, excellent at PR, enjoys entertaining, impulsive, conceals problems</td>
</tr>
<tr>
<td>ISTJ 6%</td>
<td>ISTP %7</td>
<td>ESTP 13%</td>
</tr>
<tr>
<td>practical, thorough, persevering, patient, decisive, not a risk taker</td>
<td>impulsive, thrives on excitement, hunger for action, irresponsible, dislike of authority</td>
<td>responsible, manipulative, ruthless, pragmatic, no follow through, antisocial</td>
</tr>
<tr>
<td>E</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>Administrator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The percentages show the approximate proportion of the type in the total population

---

*Wideman, R. M. Project teamwork, personality profiles and the population at large: Do we have enough of the right kind of people? Proceedings of the 29th Annual Project Management Institute, Symposium "Tides of Change," Long Beach, California, USA.*
### MBTI DOMINANT AND AUXILIARY FUNCTIONS

<table>
<thead>
<tr>
<th></th>
<th>ISTJ</th>
<th>ISFJ</th>
<th>INFJ</th>
<th>INTJ</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sensing is dominant and introverted</td>
<td>Sensing is dominant and introverted</td>
<td>Intuition is dominant and introverted</td>
<td>Intuition is dominant and introverted</td>
</tr>
<tr>
<td></td>
<td>Thinking is auxiliary and extraverted</td>
<td>Feeling is auxiliary and extraverted</td>
<td>Feeling is auxiliary and extraverted</td>
<td>Thinking is auxiliary and extraverted</td>
</tr>
<tr>
<td>ISTP</td>
<td>Thinking is dominant and introverted.</td>
<td>Feeling is dominant and introverted</td>
<td>Feeling is dominant and introverted</td>
<td>Thinking is dominant and introverted</td>
</tr>
<tr>
<td></td>
<td>Sensing is auxiliary and extraverted</td>
<td>Sensing is auxiliary and extraverted</td>
<td>Intuition is auxiliary and extraverted</td>
<td>Intuition is auxiliary and extraverted</td>
</tr>
<tr>
<td>ESTP</td>
<td>Sensing is dominant and extraverted</td>
<td>Feeling is dominant and introverted</td>
<td>Feeling is auxiliary and introverted</td>
<td>Thinking is auxiliary and introverted</td>
</tr>
<tr>
<td></td>
<td>Thinking is auxiliary and introverted</td>
<td>Sensing is auxiliary and introverted</td>
<td>Intuition is auxiliary and introverted</td>
<td>Intuition is auxiliary and introverted</td>
</tr>
<tr>
<td>ESTJ</td>
<td>Thinking is dominant and introverted</td>
<td>Feeling is dominant and introverted</td>
<td>Feeling is dominant and introverted</td>
<td>Thinking is dominant and introverted</td>
</tr>
<tr>
<td></td>
<td>Sensing is auxiliary and introverted</td>
<td>Sensing is auxiliary and introverted</td>
<td>Intuition is auxiliary and introverted</td>
<td>Intuition is auxiliary and introverted</td>
</tr>
</tbody>
</table>

### MBTI ATTITUDES TOWARDS WORK

<table>
<thead>
<tr>
<th></th>
<th>ISTJ</th>
<th>ISFJ</th>
<th>INFJ</th>
<th>INTJ</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Life’s natural organizers</td>
<td>Committed to getting the job done</td>
<td>An inspiring leader and follower</td>
<td>Life’s independent thinkers</td>
</tr>
<tr>
<td>ISTP</td>
<td>Just do it</td>
<td>Action speaks louder than words</td>
<td>Making life kinder, gentler</td>
<td>Life’s problem solvers</td>
</tr>
<tr>
<td>ESTP</td>
<td>Making the most of the moment</td>
<td>Let’s make work fun</td>
<td>People as the product</td>
<td>Progress is the product</td>
</tr>
<tr>
<td>ESTJ</td>
<td>Life’s natural administrators</td>
<td>Everyone’s trusted friend</td>
<td>Smooth talking persuaders</td>
<td>Life’s natural leaders</td>
</tr>
</tbody>
</table>

---

1 From Otto Kroeger and Janet Theusen
### MBTI TEAM FRUSTRATIONS AND DIALOGUE

<table>
<thead>
<tr>
<th>ISTJ</th>
<th>ISFJ</th>
<th>INFJ</th>
<th>INTJ</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stop working so hard!</strong></td>
<td><strong>Stop worrying about everyone.</strong></td>
<td><strong>Stop staring off into space!</strong></td>
<td><strong>Stop being so stubborn!</strong></td>
</tr>
<tr>
<td>Projects get done when we pay attention to facts and what needs to get done now. Play comes later.</td>
<td>Each team member matters. Attention to each person’s needs and wants helps us function well.</td>
<td>Thinking about the future and its implications for our team is vital to team productivity.</td>
<td>A team’s vision that’s well thought out is worth fighting for.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ISTP</th>
<th>ISFP</th>
<th>INFP</th>
<th>INTP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stop nitpicking!</strong></td>
<td><strong>Stop wearing your heart on your sleeve!</strong></td>
<td><strong>Stop feeling hurt!</strong></td>
<td><strong>Stop being so theoretical!</strong></td>
</tr>
<tr>
<td>Precision and accuracy of data allows our team to produce good work.</td>
<td>Caring for our teammates displays humanity and increases trust.</td>
<td>Exploring our deeply held beliefs and values keeps this team on the right path.</td>
<td>Teams need to develop models and carefully analyze concepts before they can begin effective work.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ESTP</th>
<th>ESFP</th>
<th>ENFP</th>
<th>ENTP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stop being so blunt!</strong></td>
<td><strong>Stop playing!</strong></td>
<td><strong>Stop changing your mind!</strong></td>
<td><strong>Stop generating new actions!</strong></td>
</tr>
<tr>
<td>Sometimes this team needs a jolt to get going.</td>
<td>Life should be lived and work enjoyed.</td>
<td>This team needs to explore all the options as it gets down to work.</td>
<td>Entrepreneurial teams keep business coming in.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ESTJ</th>
<th>ESFJ</th>
<th>ENFJ</th>
<th>ENTJ</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stop driving things so hard!</strong></td>
<td><strong>Stop socializing!</strong></td>
<td><strong>Stop talking!</strong></td>
<td><strong>Stop trying to manage us!</strong></td>
</tr>
<tr>
<td>Some tough work needs to get done now.</td>
<td>Friends and relationships keep people committed and loyal to the team.</td>
<td>Knowing each team member well is what holds the team together.</td>
<td>Someone needs to take charge.</td>
</tr>
</tbody>
</table>
## MBTI OCCUPATIONAL TRENDS

<table>
<thead>
<tr>
<th>ISTJ</th>
<th>ISFJ</th>
<th>INFJ</th>
<th>INTJ</th>
</tr>
</thead>
</table>
| *Management*  
*Administration*  
*Accounting* | *Education*  
*Health care*  
*Religious settings* | *Religion*  
*Counseling*  
*Teaching*  
*Arts* | *Scientific or technical fields*  
*Computers*  
*Law* |
| Or any occupation where they can use experience and detail to get things done. | Or any occupation where they can use experience base to help people in behind scenes manner. | Or any occupation that can facilitate emotional, intellectual, or spiritual development. | Or any occupation where use intellectual creativity and knowledge to conceptualize or analyze task. |
| ISTP | ISFP | INFP | INTP |
| *Skilled trades*  
*Technical fields* | *Health care*  
*Business* | *Counseling*  
*Writing*  
*Arts* | *Scientific or technical fields* |
| Or any occupation that requires hands-on analytical work with data or things. | Or any occupation where they can use their gentle, service related attention to detail. | Or any occupation where they can use their creativity and focus on their values. | Or any occupation where they can use their solitary, objective analysis of technical problems. |
| ESTJ | ESFP | ENFP | ENTF |
| *Marketing*  
*Skilled trades*  
*Business*  
*Applied technology* | *Health care*  
*Teaching*  
*Coaching* | *Counseling*  
*Teaching*  
*Religion*  
*Arts* | *Science*  
*Management*  
*Technology*  
*Arts* |
| Or any occupation where they can use action orientation attention to detail. | Or any occupation where they can use their outgoing nature and enthusiasm to help people. | Or any occupation where they can use creativity and communication to foster growth in others. | Or any occupation where can take on new challenges continually. |
| ESTJ | ESFJ | ENFJ | ENTJ |
| *Management*  
*Administration* | *Education*  
*Health care*  
*Religion* | *Religion*  
*Arts*  
*Teaching* | *Management*  
*Leadership* |
| Or any occupation where can use logic and organization to get things done. | Or any occupation where they can use their personal concern to provide service to others. | Or any other occupation where help others with emotional, intellectual and spiritual growth. | Or any occupation where can use tough minded analysis and strategic planning to get things done. |
MBTI TYPE PRAYERS

**ISTJ:** Lord, help me to relax about insignificant details beginning tomorrow at 11:41:02 a.m. EST.

**ISTP:** God, help me to consider people’s feelings; even if most of them ARE hypersensitive.

**ESTJ:** God, help me not to try to RUN everything. But, if you need some help, just ask.

**ESTP:** God, help me to take responsibility for my own actions; even though they are usually not my fault.

**ISFJ:** Lord, help me to be more laid back and help me to do it EXACTLY right.

**ISFP:** Lord, help me to stand up for my rights (if you don’t mind my asking ...)

**ESFJ:** God, give me patience; and I mean right NOW!

**ESFP:** God, help me to take things more seriously, especially parties and dancing.

**INTJ:** Lord, keep me open to others’ ideas; WRONG though they may be.

**INTP:** Lord, help me be less independent; but let me do it my way.

**ENTJ:** Lord, help me slow down and not rush through what I do.

**ENTP:** Lord, help me follow established procedures today. On second thought, I’ll settle for a few minutes.

**INFJ:** Lord, help me not to be a perfectionist. (Did I spell that correctly?)

**INFP:** God, help me to finish everything I start

**ENFJ:** God, help me to do only what I can and trust you for the rest. Do you mind putting that in writing?

**ENFP:** God, help me to keep my mind on one thing – Look! A bird! – ing at a time.
# FAMOUS PEOPLE AND TYPE

<table>
<thead>
<tr>
<th>Type</th>
<th>Famous People</th>
</tr>
</thead>
</table>
| **ISTJ 10%** | Harry Truman  
George Washington  
Benjamin Harrison  
Herbert Hoover  
George H.W. Bush  
Queen Elizabeth II  
Jack Webb  
Jackie Joyner Kersee  
Evander Holyfield   |
| **ISFJ 10%** | Jimmy Stewart  
Alfred Lord Tennyson  
Louisa May Alcott  
Robert E Lee  
Mother Teresa  
Jimmy Stewart   |
| **INFJ 2%** | Martin Van Buren  
Nathaniel Hawthorne  
Aristophanes  
Chaucer  
Goethe  
Gandhi  
Eleanor Roosevelt  
Robert Burns   |
| **INTJ 1%** | Dwight Eisenhower  
Thomas Jefferson  
Sir Isaac Newton  
Susan B. Anthony,  
Augustus Caesar  
Woodrow Wilson  
Mr. Spock  
Albus Dumbeldore  
Sherlock Holmes   |
| **ISTP 10%** | Bruce Lee  
Michael Douglas  
Clint Eastwood  
Michael Jordan  
James Dean  
Tom Cruise  
Keith Richards  
Frank Zappa  
Zachary Taylor   |
| **ISFP 10%** | Millard Fillmore  
Ulysses S. Grant  
Bob Dylan  
Paul Gaugin  
Fred Astaire  
Barbara Streisand.  
Wolfgang Amadeus Mozart   |
| **INFP 1%** | William Shakespeare  
Henry Wadsworth Longfellow  
Albert Schweitzer  
Princess Diana  
Richard Gere  
A.A. Milne  
Helen Keller   |
| **INTP 1%** | Albert Einstein  
Rene Descartes  
Charles Darwin  
John Tyler  
Gerald Ford  
James Madison  
John Quincy Adams  
Al Gore   |
| **ESTP 10%** | Franklin Roosevelt  
James Buchanan  
General Patton  
Madonna  
Donald Trump  
Ernest Hemingway  
John McCain   |
| **ESFP 10%** | Arsenio Hall  
Mary Lou Retton  
Elvis Presley  
Bill Clinton  
Kyle Petty  
Willard Scott  
Pablo Picasso  
Magic Johnson  
George Bush   |
| **ENFP 3%** | Franz Joseph Haydn  
Samuel Clemens  
Thomas Paine  
Andy Rooney  
Bill Moyers  
Joan Baez  
Barack Obama   |
| **ENTP 2%** | Walt Disney  
Richard Feynman  
James A. Garfield  
Rutherford B. Hayes  
Theodore Roosevelt  
Nikola Tesla  
John Adams  
Sir Walter Raleigh  
Ben Franklin   |
| **ESTJ 10%** | Colin Powell  
Lyndon B. Johnson  
James Monroe  
Andrew Jackson  
William Henry  
Hillary Clinton  
Grover Cleveland  
John D. Rockefeller  
Queen Elizabeth I   |
| **ESFJ 10%** | William McKinley  
Don Knotts  
John Connally  
Jack Benny  
Martha Stewart  
John F Kennedy   |
| **ENFJ 2-3%** | William Cullen Bryant  
Mikhail Gorbachev  
Abraham Maslow  
Ross Perot  
Oprah  
Francois Mitterand  
Martin Luther King  
Abraham Lincoln  
Captain Kirk   |
| **ENTJ 2%** | Bill Gates  
Franklin D. Roosevelt  
Richard Nixon  
Harrison Ford  
Whoopi Goldberg  
David Letterman  
Jim Carrey  
Margaret Thatcher   |

**Note:** The type percentages and information about famous people’s types are from Keirsey.com, Wiki books.org, NPR news interview with Emily Yoffee. Types of leaders, current and past were deduced by type experts based on biographical data—not questionnaires.
CONTRIBUTIONS AND PITFALLS OF TYPE

My type is:  __________

- Contributions to effective leadership of this type are:

- Pitfalls to effective leadership of this type are:

- Ways in which I can make a greater contribution are:
MBTI PROBLEM SOLVING AND DECISION MAKING

SENSING (FACTS) → INTUITION (POSSIBILITIES)

THINKING (CONSEQUENCES) → FEELING (IMPACT ON PEOPLE)

JUDGING (ACTING) → PERCEPTION (ADJUSTING)
## PROBLEMS SOLVING USING THE MBTI

<table>
<thead>
<tr>
<th>SENSING (S)</th>
<th>INTUITION (N)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the facts?</td>
<td>• What are the possibilities?</td>
</tr>
<tr>
<td>• What exactly is the situation?</td>
<td>• What other ways are there for solving the problem?</td>
</tr>
<tr>
<td>• What has been done?</td>
<td>• What do the data imply?</td>
</tr>
<tr>
<td>• What are we doing?</td>
<td>• What are the implications beyond the facts?</td>
</tr>
<tr>
<td>• What information is needed?</td>
<td>• What is this problem analogous to/with?</td>
</tr>
<tr>
<td>• How would an outsider look at this situation?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>THINKING (T)</th>
<th>FEELING (F)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the pros and cons of each possibility?</td>
<td>• How much do I care about what I gain or lose in each alternative?</td>
</tr>
<tr>
<td>• What are the logical consequences of each possibility?</td>
<td>• What are the values involved for each possibility?</td>
</tr>
<tr>
<td>• What is the cost of each possibility?</td>
<td>• How will the people concerned react to the outcomes?</td>
</tr>
<tr>
<td>• What are the positive (pleasant) and negative (unpleasant) outcomes of each?</td>
<td>• Who is committed to carry out the solution?</td>
</tr>
<tr>
<td>• What are the consequences of not acting?</td>
<td>• Will the outcome contribute to individual or group harmony?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JUDGING (J)</th>
<th>PERCEIVING (P)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What are the most important concerns that underlie the different views?</td>
<td>• What are the likely consequences of the decision?</td>
</tr>
<tr>
<td>• What do the people who hold those views deeply care about?</td>
<td>• Will the decision raise any new problems?</td>
</tr>
<tr>
<td>• What common values united all or most people who hold the views?</td>
<td>• How will the results of the decision be measured?</td>
</tr>
<tr>
<td>• What values (and their priorities and ratings) will be used to evaluate the possibilities and reach a decision?</td>
<td>• What communication and follow up is necessary?</td>
</tr>
<tr>
<td></td>
<td>• What should be done next?</td>
</tr>
</tbody>
</table>
LEADERSHIP AND THE MBTI

Leadership is most effective when you:

1. Respect the value of each style.
2. Understand the limitations of your own style.
3. Don’t stereotype or assume a style is set in stone.
4. Look at situations from multiple perspectives and styles.
5. Use each type’s natural strengths.
6. Answer all the questions in problem solving and decision making.
7. Seek diversity in engaging others to help answer the questions.
8. Strive to establish rapport between different styles.
9. Find ways to bridge over to other styles when appropriate.

Other:

TEAM COACHING EXERCISE

1. Share one strength of your type.

2. Share one potential blind spot or weakness of your type.

3. When does your strength become a weakness, or your weakness become a strength?
THE LEADERSHIP WHEEL SUMMARY

The Visionary
Seeing the Way

The Warrior
Embodying the Way

The Sage
Learning To Learn

The Teacher
Knowing the World

The Nurturer
Awakening the Heart
TEACHER: KNOWING THE WORLD

Intellectual Intelligence – “analyzing”

The influence of leaders rests in part on their expertise and their intellectual grasp of their profession and industry. Their technical skill, rational thought, and objective minds enable them to see reality clearly and objectively. This is leader as expert, and also leader as coach and mentor.

Wisdom
- Intellectual curiosity
- Logic and rationality
- Objective
- Methodical and orderly
- Focus on the real, present, specific, and concrete
- Business and technical knowledge and acumen

Shadow
- Fixated and tight
- Rigid and inflexible
- Need to be right
- Analysis paralysis
- Inability to see the big picture
- Bogged down in detail
- Appears insensitive

NURTURER: AWAKENING THE HEART

Emotional Intelligence – “connecting”

Effective leaders are able to recognize and manage the feelings and emotions of self and others. This makes them good at relationships. They care about people and working collaboratively toward common ends. They are socially skilled, good listeners, communicators, networkers, and team players. This is leader as servant and people person.

Wisdom
- Emotionally aware and empathic
- Focus on building relationships
- Collaborative and team player
- Values-driven
- Service-oriented
- Good listener and communicator

Shadow
- Overly sensitive
- Takes things personally
- Dependence
- Conflict averse
- Unassertive
- Feels guilty about differences
- Pride

VISIONARY: SEEING THE WAY

Intuitive Intelligence – “planning”

Leaders are able to see the big picture and think strategically and systematically in a way that helps them see the opportunities and the possibilities. They also have a clear purpose and vision for what they are doing and the purpose that guides their actions. That vision serves to uplift aspirations, foster commitment, and galvanize others. This is leader as visionary.
Wisdom
- Creative and innovative
- Connects the dots and sees the big picture
- Conceptual and abstract thinker
- Likes change
- Able to see what is most important
- Inspiring and uplifting
- Spontaneous

Shadow
- Unfocused
- Over-committed
- Impulsive and addictive
- Lacking follow-through
- Inattention to detail
- Easily bored
- Dreamer and impractical

WARRIOR: EMBODYING THE WAY

Action Intelligence – “enacting”

Leaders are task and results oriented, and able to get things done. They actualize plans, take control of a situation, challenge the process, and take risks and experiment to make things happen. More importantly, they walk the talk, model the way, and align their actions with their words and deeds. This is leader by example.

Wisdom
- Task and results oriented
- Courageous and willing to take risks
- Drive and ambition
- Authenticity – walking the talk
- Strength and perseverance
- Discipline

Shadow
- Busyness
- Overly competitive and aggressive
- Insensitivity
- Controlling
- Micro-managing
- Bull-dozing
- Ready, fire, aim

SAGE: LEARNING TO LEARN

Spiritual Intelligence – “reflecting”

Effective leaders know themselves and what they have to offer. They are learners, know themselves, and are open, candid, and humble in their striving to grow and develop. They feel empowered to make a difference and make the most out of any experience. This makes them agile and able to adapt to changing situations. This is leader as learner.

Wisdom
- Self-awareness and understanding
- Personal agility and balance
- Urge to learn
- Open and candid
- Calm and composed
- Optimism

Shadow
- Doubt
- Spaciness
- Complacency
- Victim mentality
- Dullness
- Denial
THE LEADERSHIP WHEEL AND DERAILMENT

The wisdom of each style becomes shadow when it is used to validate the ego and serve self-interest. This is usually the result of a fear or insecurity that manifests as a “hanging-on” or “overplaying” a view to the point of turning an inherent strength into a weakness. Teachers, for instance who hold too tightly to the powers of their intellect can become overly attached to their view and try to make everything black and white, yes or no, and stubbornly fixate on their ideas. The shadow is transmuted back into wisdom through an “opening up” or “letting go” of the fear or sense of self-importance. This is wisdom activity, and for the Teacher, it means being objective.

<table>
<thead>
<tr>
<th>Archetype</th>
<th>Intelligence</th>
<th>Wisdom</th>
<th>Shadow</th>
<th>Wisdom Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher</td>
<td>Intellectual</td>
<td>Absolute Clarity</td>
<td>Tightness</td>
<td>Objectivity</td>
</tr>
<tr>
<td>Nurturer</td>
<td>Emotional</td>
<td>Emotional Enrichment</td>
<td>Over-sensitivity</td>
<td>Equanimity</td>
</tr>
<tr>
<td>Visionary</td>
<td>Intuitive</td>
<td>Inspiring Insight</td>
<td>Compulsive Desire</td>
<td>Discernment</td>
</tr>
<tr>
<td>Warrior</td>
<td>Action (Volitional)</td>
<td>Selfless Activity</td>
<td>Competitiveness</td>
<td>Self-discipline</td>
</tr>
<tr>
<td>Sage</td>
<td>Spiritual (Consciousness)</td>
<td>Urge to Learn</td>
<td>Dullness</td>
<td>Awareness</td>
</tr>
</tbody>
</table>
THE LEADERSHIP WHEEL AS A LEARNING WHEEL

In each of these ancient traditions, the Wheel provided not only a way of understanding self but also an integrated path to knowledge and spiritual awakening. In essence, the five archetypes of the Wheel also constitute a five-step cycle of learning and development of the ego. This cycle can transpire in an instant, as in the hundreds of adjustments and decisions we make from moment to moment based on the input of daily experience, or it can unfold as part of a longer personal developmental process that may take months, or even years.

This Learning Wheel can be applied as an action learning model for personal, team or organizational learning and development.
THE LEADERSHIP WHEEL: AN ANCIENT PARADIGM FOR DEVELOPING ETHICAL, RESPONSIBLE, AND BALANCED LEADERSHIP

INTRODUCTION

Perhaps more than at any other time in our history, the social, environmental, and ethical challenges of our time demand leaders who are inspired not only by doing well for themselves, but also by doing good in the world. For our modern capitalist system to work well, we need balanced, principled and responsible leadership. Yet every year we witness leaders and executives who derail from greed, collusion, and corruption – reminding us that the very forces of self-interest that drive our system can also bring irresponsible actions that threaten it.

But how do we develop ethical, responsible, and balanced leaders? Although leadership has received a great deal of attention in recent years, we still lack a common framework for even defining leadership, let alone one for developing ethical and responsible leadership. From transactional to transformational, from emotional to servant, and from the irrefutable laws to adaptive leadership, the theories abound. And while some have claimed leadership to be innate and available to only a few, others contend it can be learned and so is accessible by many. In the end, as James McGregor Burns once said, “perhaps the only certain thing we can say is that there are as many definitions of leadership as there are attempts to define it.”

A number of years ago, I came across a unifying framework that I found very intuitive and compelling, both for its elegant simplicity as well as for its inherent potential for addressing the need for developing such leaders. This framework emerged from my study of Tibetan Buddhism and the particular Buddhist views of what it takes to be an effective human being. These views consist of five archetypal intelligences – ways of knowing and being – that the Buddhist portrayed through the cardinal directions of the compass. More commonly known as a Mandala, this ancient framework has provided a guide for personal growth and effectiveness that has withstood the test of time for thousands of years.

Each direction of the Mandala represents a particular intelligence, for knowing, relating, and living in harmony with the world. Taken as a whole, the directions symbolize perfection and balance, and provided a guide for understanding the self and realizing one’s full human potential. The belief is that an individual is born into a single direction, and so enters the world incomplete and dominated by a root preference. Yet the purpose of life is to seek self-understanding and grow to completeness by accessing the intelligence of the other directions, and in so doing reach a place of balance and goodness from which to lead and influence others. In following this path, people find the wisdom and balance necessary for acting effectively for the benefit of all.

Each intelligence also has a wisdom aspect and a shadow aspect. Wisdom turns into shadow when it is used to validate the ego and serve self-interest. This usually comes from a fear, doubt, or insecurity that manifests by “hanging-on” to a particular view, or some form of protecting or projecting the ego. As a result, people can overplay their view to the point of turning a strength into a weakness, and create obstacles to developing personal influence, and effective relationships. Thus the Mandala provides insight not only into personal effectiveness, but also into personal derailment.

Although no perfect parallels exist, the similarities between the five archetypes and the research of twentieth century psychologists and management thinkers are remarkable. There are clear parallels, for example, with the four Jungian personality types, the five dimensions of Five Factor Model used in modern psychological research, and recent management literature including the work of Peter Senge, Kouzes and Pozner, and Peter Koestenbaum, and others. It seems, then, that our modern age is rediscovering this ancient wisdom.
The primary difference is the utter simplicity and intuitive appeal of the five directions. It provides a compelling, powerful and elegant framework for not only defining leadership but also how to develop leaders who do well while doing good in the world. The following introduction is an adaptation of this ancient paradigm.

**EAST: THE WAY OF THE TEACHER – INTELLECTUAL INTELLIGENCE.**

The archetypal wisdom of the Teacher is about intellectual intelligence. It is the place of first illumination, where our senses make first contact and recognition of the world. Teachers inquire and acquire knowledge. They have curious minds and constantly inquire into all levels of reality and experience. They are rational and objective, express little emotion, and suffer few illusions. They are conservative, methodical, and interested in facts and data. They ponder consequences and analyze information while attempting to bring order and understanding. They are attentive to detail and like to share their knowledge in support of others. They bring the gift of expertise as a true teacher does.

In today’s world, the Teacher represents the power of constant inquiry and analysis for informed decision making. Teachers drive learning through continuous testing of ideas, analyzing data, and measuring performance. This forces greater precision and understanding of where we are in our current reality and what is shaping our future. The Teacher seeks data and feedback, helps to detect and correct errors, and tells us where we are and how things are working. Teachers lead by asking critical questions, sharing their insights, and teaching others. Thus the true power of the Teacher is the ability to capture and share their expertise for the prosperity of all.

*This is leader as expert, and leader as coach and mentor.*

**Wisdom**
- Intellectual curiosity
- Logic and rationality
- Objective
- Methodical and orderly
- Focus on the real, present, specific, and concrete
- Business and technical knowledge and acumen

The shadow of the Teacher comes from a fear of being wrong or not knowing. When something arises outside the current range of understanding, people of this type feel thwarted, or even threatened. So they hold on to their view and become rigid, righteous, and overly critical of others. They are obsessed with detail, lose sight of the big picture, and when pushed, they can become annoyed, even angry. Research shows that rigidity, insensitivity, inability to see the big picture are common reasons for leadership derailment.
SOUTH: THE WAY OF THE NURTURER – EMOTIONAL INTELLIGENCE.

The wisdom of the Nurturer is about emotional intelligence. It is the place where the intellectual stimulus of the Teacher is enriched and deepened through feeling, connection, and emotional reaction and connection. The Nurturer represents the wisdom of love, friendship, and compassion for producing strong families and communities. It is the place of trust and unconditional commitment where emotional support encourages extending out into the world to learn with a sense of safety. Nurturers believe that when individuals feel valued and trust each other, they will be more motivated, more able to learn, and willing to make sacrifices for the greater good.

In a business environment, the Nurturer represents the power to develop trust and commitment for producing strong teams and supportive organizational cultures. Nurturers are the moral and ethical compass of the organization. They feel that how things get done is just as important as what gets done. They build the social capital necessary to learn, develop, and accomplish things. Individual limitations are overcome by leveraging the talent and tapping the potential of the entire team. This happens in a supportive environment that is sustained through mutually shared values and decisions. The Nurturer, then, is the steward of empowerment and service, dedicated to the development and support of all stakeholders. This is leader as servant and people person.

Wisdom
- Emotionally aware and empathic
- Relationship building
- Team player, collaborative
- Values driven
- Service-oriented
- Good listener and communicator

The shadow of the Nurturer arises out of a fear of inadequacy, and manifests as feeling that is turned inward—other-feeling turns into self-feeling. So, whereas shadow Teachers are hung-up on their ideas of things, overly strong Nurturers get hung up on their feelings of themselves. They take themselves too seriously, become dependent on others for approval, and overly sensitive to criticism. And since harmony is so important to them, they also avoid conflict. Unassertiveness, oversensitivity, and dependence are key challenges for them.

Shadow
- Overly sensitive
- Takes things personally
- Dependence
- Conflict averse
- Unassertive
- Feels guilty about differences
- Excessive pride
WEST: THE WAY OF THE VISIONARY -- INTUITIVE INTELLIGENCE.

The wisdom of the Visionary is about intuitive intelligence, and the vision for attaining the highest goals in life. Visionaries assimilate the sensing and feeling impressions of the first two directions to discern what is most important and form a conceptual understanding moving forward. They bring the gifts of insight for seeing and knowing the deepest truth. They see broadly and are able to connect the dots and make sense of experience. This allows them to grasp the essence of things, develop a sense of purpose, and create meaning for themselves and others. Thus, they look upon the world with hope and opportunity, and are creative, spontaneous, and able to see a world of many possibilities.

In today’s culture, the Visionary represents the power of innovation, strategy, and vision. Visionaries love ideas, the big picture, and understanding how things work together. They think strategically and creatively, and possess a deep understanding of the different possibilities and their consequences. They synthesize quickly and make judgment calls, based on a "gut feel" for a situation. This helps them see what is most important and an ability to derive meaning for what they are doing. This vision or sense of purpose serves to uplift aspirations, foster commitment and galvanize self and others. This is leader as visionary, leader as architect, or leader as designer.

Wisdom
- Creative and innovative
- Connects the dots and sees the big picture
- Conceptual, abstract thinker
- Likes change
- Sees what is most important
- Inspiring and uplifting
- Spontaneous

The shadow side of the Visionary arises out of a fear of meaninglessness or loss of purpose. Shadow Visionaries compensate by constantly pursuing new possibilities. As a result they lose sight of the detail, lack of follow-through, and compulsively chase dreams as they jump from one idea to the next. Their distractions spread them too thin and leave no time for their discriminatory faculties to function. They derail from inattention to detail, lack of follow-through, and inability to maintain focus.

Shadow
- Unfocused
- Over-committed
- Impulsive and addictive
- Lacks follow through
- Inattentive to detail
- Easily bored
- Dreamer and impractical

NORTH: THE WAY OF THE WARRIOR -- ACTION INTELLIGENCE.

The wisdom the Warrior is about action intelligence. Warriors take the messages gleaned from the previous directions and embody them into conscious, volitional action. They actualize plans, internalize the lessons and close the gap between knowing and doing. Warriors possess the will and determination to get things done as they know they should be done, even in the face of risk and obstacles. They are strong, task-oriented, and decisive individuals who go after a problem. They take full control and responsibility for their lives. They are courageous and driven, often making personal sacrifices for benefit of the greater good.
In today’s world, the Warrior represents the power to focus energies and align thoughts and actions in moving toward a desired future. Warriors possess a discipline for putting plans into action and getting results. They model the way, walk the talk, and lead by example. This makes them authentic. Thus the power of the Warrior lies in integrity and aligning actions with words.

Warriors personally model, demonstrate, and embody the values, plans, and visions they espouse for themselves and their organizations through the actions they take. They also encourage, challenge, and empower others to do the same. This is leader as model, or leader by example.

**Wisdom**
- Task and results-oriented
- Courageous and willing to take risks
- Drive and ambition
- Discipline
- Authenticity – walk the talk
- Strength and perseverance

The shadow of the Warrior arises out of fear of being left behind, or of losing control. They can become so attached to accomplishing goals that that they constantly compare themselves to the achievements of others, and become ambitious, aggressive, and controlling to the point of being insensitive and bulldozing. They become busybodies, doing for the sake of doing, and as a result, they often charge off in the wrong direction. Insensitivity, abrasiveness, and micromanaging are often hallmarks of a derailed Warrior.

**Shadow**
- Busyness
- Overly competitive and aggressive
- Insensitivity
- Micro-managing
- Bull-dozing
- Ready, fire, aim
- Controlling

**CENTER: THE WAY OF THE SAGE -- SPIRITUAL INTELLIGENCE.**

Finally the wisdom of the Sage is about spiritual intelligence. It is the place of consciousness where the governing urge to learn, grow, and realize full potential awakens. It is a ground of awareness that is one step up from the awareness of the Teacher, it is awareness of awareness, thinking of thinking, as one does in reflecting on the lessons of experience. It is this ground that makes Sages calm, serene, and open because they are able to adapt based on what they have learned and make situations workable. It is the place of optimism and self-mastery where the predisposition to be aware, reflect, and become fully conscious makes Sages feel empowered to make a difference with their lives.

In the business world of today, Sages are continuous learners and agile, as they are able to continuously adapt to changing circumstance. Sages seek to be fully aware and realize their fullest potential. They have a desire not only to learn, but to learn how to learn, and to take charge of their own development. That desire is driven by an optimism that makes every situation workable and allows them to make the most out of every experience. This makes them balanced and agile, and able to thrive in a variety of contexts. This is leader as learner.
Wisdom
- Self-awareness and understanding
- Personal agility and balance
- Urge to learn
- Open and candid
- Calm and composed
- Optimism

The shadow of the Sage arises out of a fear of powerlessness over life. The shadow is disempowering, makes people feel victimized who withdraw from taking responsibility for life. In this case people want to hang out and not be bothered, leaving the details of life unattended to, uncared for, and neglected. They shrink from reality and lose focus on who they are; they become complacent, and ignore important signals or feedback in their lives to change, grow, and develop. In effect, they fall asleep.

Shadow
- Doubt
- Spaciness
- Complacency
- Victim mentality
- Dullness
- Denial

A UNIFIED MODEL OF BALANCE AND LEARNING

Having taken this tour, we begin to see how The Leadership Wheel offers a fresh and integrated view for understanding leadership and personal effectiveness and why balance among all five intelligences is so essential. Each direction offers a unique and important way of knowing and relating to the world which taken together move an individual towards their full potential. The action intelligence of the Warrior, for instance, without the compassion or emotional intelligence of the Nurturer could be insensitive. Likewise, action without the perspective of intuitive intelligence of the Visionary could be miss-directed. And finally, action without the hard questions of intellectual intelligence of the Teacher could be premature. A balance among all directions is necessary for effective action.

The five directions also offer important insights into learning and how leadership is developed. In essence the five intelligences provide a five step action learning cycle leading to progressively higher states of knowledge and action. Thus The Leadership Wheel is also a Learning Wheel. Intellectual intelligence, for instance, takes in data and information objectively; emotional intelligence adds depth to that experience through a feeling response of pleasure, pain, or indifference; intuitive intelligence assimilates this data and conceptualizes a plan of action for moving forward; action intelligence follows through by closing the gap between the idea and reality; and spiritual intelligence reflects on the lessons learned for improving in the next cycle. Each step and iteration of the cycle, leads to greater learning and greater consciousness.

A MODEL FOR ETHICAL AND RESPONSIBLE LEADERSHIP

Most importantly, for developing ethical and responsible leadership, this framework underscores the importance of selflessness for achieving this learning and balance. According to Buddhist tradition, the key to accessing the wisdom of each direction and transmuting the shadow into wisdom is openness. Openness is the practice of awareness and compassion and together they make up the two foundational practices for traveling around Wheel.

Awareness is represented in the East - West axis of The Leadership Wheel, and shapes how we know the world. It reflects the combined powers of the Teacher and the Visionary in helping us see, discern, and make sense of our experience. Compassion is the North - South axis, and shows us how we engage the world. It reflects the wisdom powers of the Nurturer and the Warrior merging to determine how we relate...
to and engage others in compassionate, collective action. Together, they are said to be like the two edges of a sword that cuts and slices away the ego, and opens us fully to our experience. Awareness enables us to cut through obscurations and habitual patterns to see our intrinsic human nature, while compassion awakens our hearts and enables us to reach beyond self-interest to help and serve others.

Openness is also key to transmuting the shadow into wisdom. As described above, the shadow is basically a self-protecting or self-projecting reaction to an innate fear or doubt that we all share. In essence, it is selfishness. Openness asks us to let go of this sense of self-importance, step through the fear, and dare to try a new view. So instead of negating, or ignoring fears, they are turned into vehicles for personal growth. Awareness helps us see our negative patterns, and compassion their impact on others. Together they help us suspend the sense of self and open us to new possibilities. In the process we move from selfishness towards selflessness, and from leading from a place of fear to leading from a place of basic goodness.

The basic strategies for practicing openness, accessing the different intelligences, and transmuting the shadow into wisdom are the following:

<table>
<thead>
<tr>
<th>Archetypal Intelligence</th>
<th>Wisdom</th>
<th>Shadow</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intellectual</td>
<td>Absolute Clarity</td>
<td>Tightness</td>
<td>Objectivity</td>
</tr>
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<td>Emotional</td>
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<tr>
<td>Intuitive</td>
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<td>Compulsive Desire</td>
<td>Judgment</td>
</tr>
<tr>
<td>Action (Volitional)</td>
<td>Selfless Activity</td>
<td>Competitiveness</td>
<td>Self-discipline</td>
</tr>
<tr>
<td>Spiritual (Consciousness)</td>
<td>Urge to Learn</td>
<td>Dullness</td>
<td>Awareness</td>
</tr>
</tbody>
</table>

Thus the wisdom of the five directions provides us with a useful framework for understanding leadership as well as a balanced and integrated path for personal growth and development—one that results in the wisdom and balance necessary for acting in ethical and responsible way.