

bt

THE BULLING TOWNE GROUP, LLC

Learning and Development Assessment



Introduction

THERE ARE TWO MISTAKES ONE CAN MAKE ALONG THE ROAD TO TRUTH . . .
NOT GOING ALL THE WAY, AND NOT STARTING.
BUDDHA

How is your team managing and leading now? Before you pick any training program, take some time to figure out what skills are necessary and how the team is currently operating. Then, we can select the most relevant learning program.

Here are the areas we'll work on:

- 1. RANKING MANAGEMENT AND LEADERSHIP AREAS**
- 2. NARROWING IT DOWN**

Ranking Management and Leadership Areas

MANAGEMENT IS DOING THINGS RIGHT; LEADERSHIP IS DOING THE RIGHT THINGS.
PETER DRUCKER

Use the below scale to evaluate your team's skills. Please be honest.

NA: Not applicable at this time.

1: Deficient. Requires constant, active management in order to accomplish this task.

2: Needs a great deal of improvement. Barely getting by.

3: Minimum level of competence. Regularly needs guidance and coaching.

4: Competent. Fairly well skilled in this area.

5: Highly competent. Rarely needs guidance. Superstar.

| TOPIC | RATING |
|--|--------|
| 1. SELECTING TEAM MEMBERS | |
| a. Hiring and interviewing candidates. | |
| b. Orienting new employees. | |
| c. Managing out during the orientation period, when applicable. | |
| 2. MANAGEMENT FUNDAMENTALS | |
| a. Setting SMARTie goals. Specific, measurable, action oriented and aligned, realistic, time bound, innovative, and ethical goals. Telling people what to do. Writing individual and team goals. | |
| b. Giving feedback: positive and constructive. Giving it down, across, and up. | |
| c. Delegating. Deciding what to hand off and being specific in directions. | |
| d. Tough talk. Having tough conversations and following up afterwards. | |
| e. Team building. Planning team- and business-appropriate activities that help individuals to become a cohesive and highly engaged and functioning team. Team building is not about beer and bowling. | |

| TOPIC | RATING |
|---|--------|
| 3. TRANSITIONING TO LEADERSHIP | |
| a. Emotional Intelligence. The ability to identify your emotions and understand how they affect your decisions and your relationships with others. The ability to recognize and control subtle body language that sends the wrong signals. | |
| b. Coaching employees. Guiding discussions vs. directing them. Partnering in a conversation vs. being the person with all the answers and ideas. | |
| c. Managing up. Understanding your boss and superiors. Understanding what they need and how to appeal to them. | |
| d. Managing internal networks. Working collaboratively with other departments, cross functionally. Managing internal, shared resources. Being politically savvy. | |
| e. Leadership presence. The ability to stand up and give an engaging presentation. Comfortable working with executives. | |
| f. Strategic thinking. The ability to anticipate issues, solve problems, and make decisions with ever-changing data. Ability to make daily decisions with long-term goals in mind. | |
| 4. DETOURS | |
| a. RIFs. Deciding whom to lay off and how. | |
| b. Adapting to change. Ease in explaining why change is necessary and what behaviors employees must use to succeed in a new environment or under a new initiative. Ability to rally people, in an authentic manner. | |
| c. Managing out and terminating employees. Managing struggling employees. The what, why, and how of PIPs (performance improvement plans). | |
| 5. FUTURE DESTINATIONS | |
| a. Retaining top employees. Identifying top performing employees and understanding how to create opportunities for advancement (besides promotions). | |
| b. Personal development. Keen awareness of own development areas. Actively seeking opportunities to demonstrate new levels of excellence. | |

Narrowing It Down

THE ONLY WAY TO DEVELOP RESPONSIBILITY IN PEOPLE IS TO GIVE THEM RESPONSIBILITY.
KEN BLANCHARD

Review at your “1” and “2” selections and narrow them down.

FIRST, list them here:

| AREA | AREAS RANKED #1 | AREAS RANKED #2 |
|------------------|-----------------|-----------------|
| 1. Example: 5.b. | | |
| 2. Example: 1.d. | | |
| 3. | | |
| 4. | | |
| 5. | | |

SECOND, consider the areas ranked #1 and answer the questions below.

Which areas have the greatest number of employees affected by them? For example, if a #1 area is 2.a., setting goals, then almost everyone in your organization is affected by this deficiency. Consider starting here.

An alternative inquiry would be, which areas are affecting revenue, customer engagement, product quality, brand awareness, etc.?

THIRD, review our project scoping document and begin to formulate a plan to gather support for your learning initiative. This document will help you decide where—among your top few—to start. It will help you to consider the current and ideal situations, metrics to evaluate success, the commitment level, and your budget.



Questions? Contact us at 1.800.789.8449 or email coach@bullingtowne.com.

About Your Coach

Leila Bulling Towne is an executive coach who specializes in helping leaders decide what to say and how to say it. She coaches executives to speak with authority and authenticity, whether they are communicating to employees, the board, or customers.

Leila hosts her own CBS Interactive video series, “Leila’s House of Corrections.” The videos are streamed thousands of times a day on BNET.com. She is a regular leadership commentator for CBS TV in San Francisco and can be heard on CBS radio stations nationwide.

Her work has been featured in *The Wall Street Journal*, Reuters, *HR* magazine, CareerBuilder.com, *The Rotarian*, and *Women’s Health*, among many others. Her clients range from well-funded Silicon Valley startups to Fortune 500 companies.

Workshops by The Bulling Towne Group include core management skills, behavioral interviewing, transition to leadership, coaching for leaders, and teambuilding with the MBTI®.

In addition to coaching and leadership development, Leila facilitates strategic retreats, speaks at conferences, and hosts webinars for professional associations and clients.

Leila graduated from the University of California at Berkeley with an AB in English and German. She received her MA in English from The Claremont Graduate School at The Claremont Colleges. She has worked with organizations in the US, UK, Germany, France, China, and Australia and currently resides in the San Francisco Bay Area.

You can learn more about Leila and her team at www.bullingtowne.com, by calling **415-744-1991**, or by emailing coach@bullingtowne.com.

The screenshot shows the website for The Bulling Towne Group, LLC. At the top left is the logo 'bt' and the company name. A navigation menu includes: COMPANY (about leila, partners), EXECUTIVE COACHING (programs, example plan, assessments, consultations), TRAINING (workshops, webinars, hr only), SPEAKING (topics, featured in), RESOURCES (media kit, newsletter, videos, reading list), CONTACT, and BLOG.

The main content area features a map with colorful pushpins and the heading 'EXECUTIVE COACHING' with the subtext 'We help executives on their way to the C-suite decide what to say and how to say it.' Below this are three service boxes: 'EXECUTIVE COACHING' (helping C-suite executives), 'LEADERSHIP WORKSHOPS' (making training tangible and fun), and 'WEBINARS' (training employees in San Francisco and Sydney). A 'MEDIA COMMENTARY' section is also visible.

On the right side, there is a featured article titled 'What are the 5 Leadership Themes for this Year?' with a 'submit' button and a note about a monthly newsletter. Below that is a 'Need a Speaker?' section with a microphone icon and text about unique, balanced, and practical commentary.