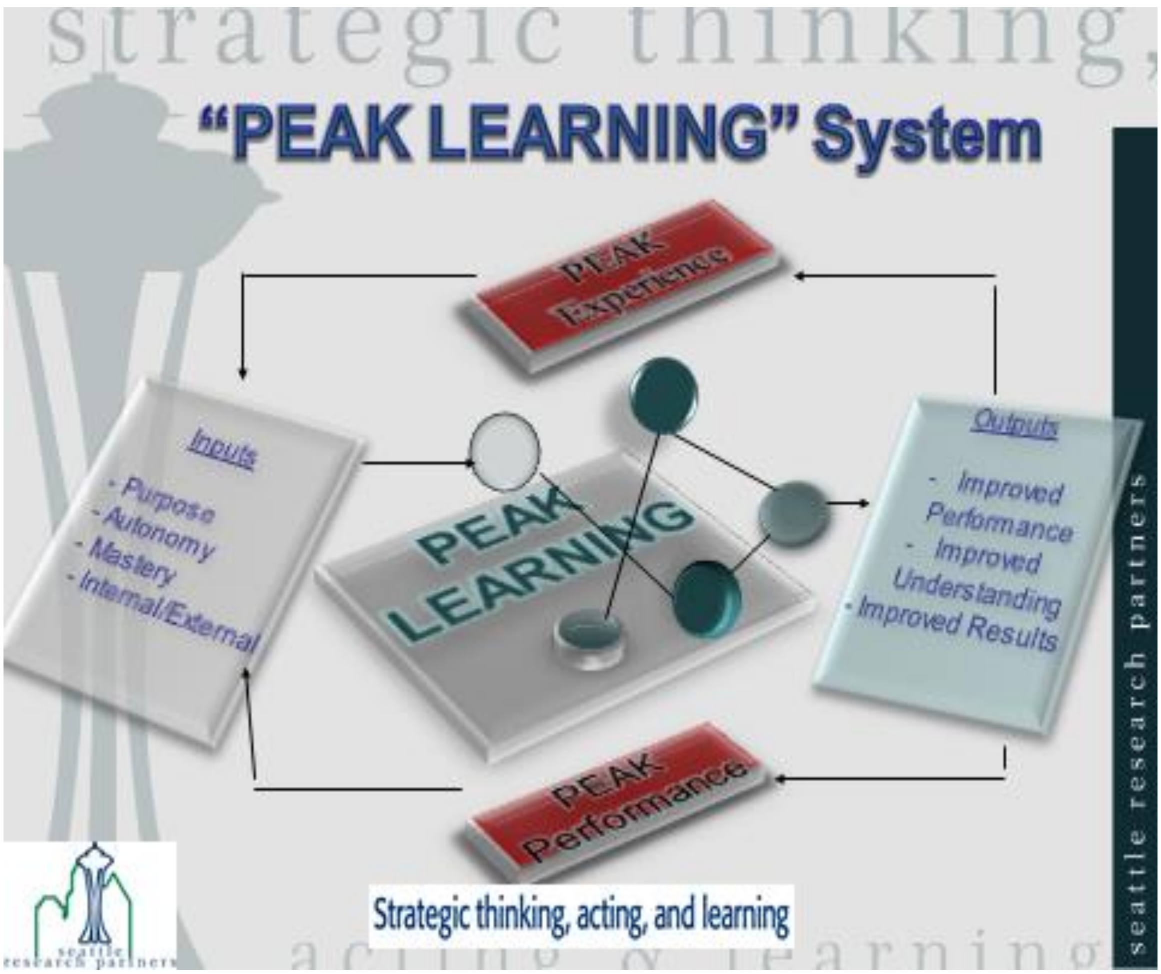
STRATEGIC LEARNING & LEADERSHIP: AN APPLIED WORKBOOK



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Professionalism: Effectively Applied Knowledge (PEAK)™
Research & Result: An Applied Learning Theory

The Strategic Learning Alliance (SLA) is forging a new direction for learning.

Beginning with the Strategic Learning™ process and the strategic learning series™, a revelation was discovered linking the role of performance and experience with learning. PEAK Performance and PEAK Experience were defined by Maslow (1959) as always present conditions in the human lived experience. In decades of research, however, it has become apparent that there is one common thread specific to maximized performance and experience: Learning. Professionalism: Effectively Applied Knowledge (PEAK)™ is a system founded in development of the holistic individual through well-being by teaching participants a greater level of awareness and knowledge of themselves using both distal and immediate thinking skills. While doing this, each learner enhances their skill-sets and performance in various life situations; motivated by their interest in a selected subject matter. The concept is rooted in the doctoral research of J. Paul Rand, PhC, MBA and Seattle Research Partners, Inc. who sought to find a manner that promotes individual well-being through learning experiences. Based on the Living & Well-Being model (Carruthers & Hood, 2007) and the Strategic Learning Series©, a process design by Rand through his dissertation, the SLA programs have created a method for blending performance and experience into one learning method used for predictive applied results.

What is Strategic Service-Immersion Learning?

Think of immersion as "practice," or trial, experiences. Immersion learning is formed on the concept that performance is the effective application of knowledge (PEAK: see Rand, Rand, & Rand, 2011). It is a process that provides a safe but structured environment to promote performance and experience through application of theory into real-life settings. In doing so, individuals will experience increased well-being through greater recognition of themselves as individuals, improved confidence, and stress-reduction. While this occurs, the learners are developing a more in-depth theoretic knowledge to support their learning through application. In other words, through regular "practice" certain key psychological, business or applied skills, and learning tools are re-enforced to produce better than desired outcomes when the opportunity for real-life application arises.

How does it work?

By exposing individuals to new activities through a structured - but creative and expressive - process they are empowered to develop their internal leadership abilities, improve confidence, and continually apply their learning in order to achieve desired results. These programs are built around a process for gradually improving performance in the classroom by first having learners improve through experience and involvement in nurturing settings. The objective of the program approach was to reduce the 90% attrition-rate for at-risk populations in traditional academics, but helping provide a learning experience that adequately prepares learners to lead their own life in a vocational role or to pursue higher education once they have developed the skills to ensure their success.

For this reason, the SLA provides up to 45 university credits toward a four year degree for qualified participants.

Immersion Learning for Adults

While each segment of learning is rooted in concepts of application through performance, the adult learning experience emphasizes skill sets for performance in the work-place versus exploration of arts. To this end, the SLA program provides vocational re-training and management/leadership retraining. By combining theoretic knowledge with strategically selected vocational certifications, SLA learners have an opportunity to immerse into topics of individual interest or vocational need. The SLA program keeps a nurturing environment by promoting involvement with non-profits. In other words, an individual in an SLA program will not just learn the basics of organizational planning, clerical assistance, and project management, but will actively work with assigned non-profits (or their individual business for the entrepreneurial program) to clarify strategy, establish goals, devise projects and manage those projects with teams of volunteers supporting local non-profits.

Through this experience, adults not only are challenged to live more dynamic lives, but also apply their learning in a manner that best suits their ultimate performance in the work-place. There is a wide array of research and data conducted by Seattle Research Partners, Inc. working in cooperation with Seattle Pacific University, the Seattle Jobs Initiative, Improved Employees, Taylor Protocols, Society of Human Resource Management, Human Resource Credentialing Institute, and organizational development programs to research the peak results and applied learning theory used by Strategic Learning Alliance to accredit applied-certifications.

Technical Information

Immersion learning does not replace traditional academics. Instead it is rooted in positive psychology (Humanistic). The objective behind the Strategic Learning Series © process and experience is to draw from tried-and-true practices of business planning, leadership, coaching and development, and recreation to enhance learning output by delivering not only theoretic experience, but also applied performance. Through the application of immersion, all ages participating in programs will come to achieve greater levels of self-awareness, improved confidence, and reduces stress through the recreational experiences promoted by the Strategic Learning Series ©.

Material

This version of the Strategic Learning & Leadership Guide will be delivered to you electronically. The workbook pages are included may also be supplemented by a specific PEAK Programs & Course template customized based on your involvement with the Immersion-Service Learning (a process of Strategic Learning Series©) experience and an approved Professionalism: Effectively Applied Knowledge (PEAK)™ programs. As such, the initial workbook section will highlight the use of tools and provide you with instructions as you read. Please apply the workbook in the stages presented to you by your instructor. At the start of each formal class (online or in person) you will receive a customized workbook depending on the nature of the class, certification, or projects that you will engage in during those 6 week intervals.

Demystifying the Experience

The use of learning tools is required for program completion. While it may be cumbersome at first, by the second term you will have identified your learning style (Assessments optional; contact paulrand@seattleresearchpartners.com) as well as tools which fit you best. However, a key part of well-being is not dismissing weaknesses outright but being aware of why such learning styles are a weakness and what opportunities you have to leverage your strengths. In our experience, 80% of the tools in this book are effective no matter how you learn.

USING THIS BOOK

There are a number of publications on the market that claim to help you study for exams, courses, or new hobbies; and they do. But what most of these books do not offer is a framework to help you learn effectively; to retain the information you read; and, to put it in context *real* to you. Once it is real to you, the better your chances are of applying what you have learned to situations and scenarios concerning your real life thinking and acting.

Drawing from the principles of adult learning theory, cognitive and affective psychology, and applied business principles, this program creates a system whereby learners think, act and learn strategically through highly applied coursework: Peak-Learning Theory™. This book is designed to help you gain a purposeful approach to learning, in an applied process that is paramount to your PEAK-Learning experience (Rand, Rand, & Rand, 2011). It is tailored specifically to aid you in your preparation for a Professionalism: Effectively Applied Knowledge

(PEAK)™ program that may focus on specific subject-matter, service-immersion learning, or professional development coursework.

This book offers both personal and professional enrichment. A variety of learning methods and tools are referenced throughout the book. You are encouraged to use them to develop solutions for the situations presented here and those you encounter in your own experience.

Our experience tells us, learners who create a systematic and focused approach to learning the materials for their specific learning experience, do much better on the exams, papers, and in real-life application (personal and professional development; SLA, 2013) than those students who do not approach courses with a plan for learning. For this reason, we have created a process for learning with tools specifically designed to help you apply and retain what you are learning regardless of your life roles and responsibilities:

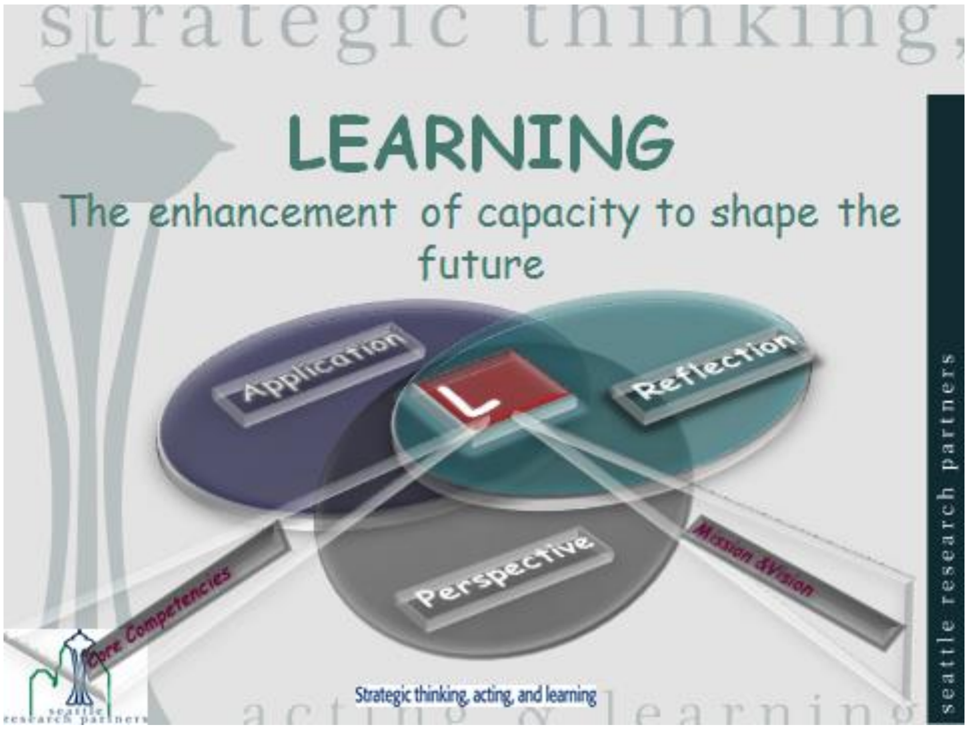
1) **Strategic and Critical Thinking models:** you will be introduced to the concepts of strategic and critical thinking. We will take you through each and provide you the background you need to immediately start applying these principles.

2) **Purposeful Learning©**: Most of us do not enjoy taking tests and feel we are not 'good test takers'. This type of negative self-talk stems from legitimate experiences from our educational history. We have found by integrating adult learning theory, systems thinking, and a proactive and planned approach to study and exam preparation, learners are better able to change negative self-talk to positive self-talk which translates to a positive learning experience. Purposeful Learning™ is a systematic process designed to expand your knowledge, increase your learning retention and improve your learning performance. It involves:
    - Active Engagement
    - Active Reading
    - Active Learning

By following this active and purposive approach to learning, you will be engaged in a self-directed process to master the Immersion-Service Learning™ experience. So long as you stay committed to your program plan, you will improve your knowledge development and learning-retention, which will ultimately help you perform well in applied situations personally and professionally. As a result of engaging fully in this learning program you will fundamentally alter how you identify, handle, and resolve business, personal, and professional challenges.

~ The Seattle Research Partners Team.

Section One



Learning: A Systematic Process

System: A system is a perceived whole whose elements 'hang together' because they continually affect each other over time and operate toward a common purpose. Examples of systems include the human body, ecological niches, and all organizations.

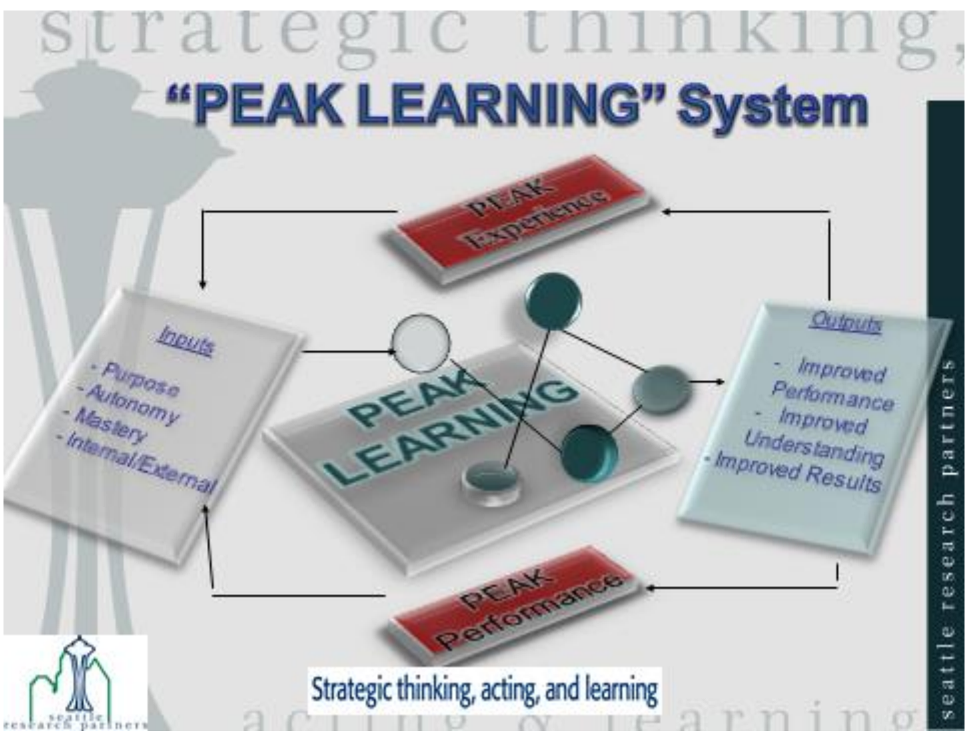
Arthur Kleiner

Understanding Learning

Understanding how learning occurs and creating a coherent and sustainable *system* that fosters our own learning requires a different paradigm, or 'new way of viewing our world'. As we examine our paradigm about learning we are challenged to reevaluate our own **bias** about ourselves and our abilities to learn. It is our choice to understand the complex relationships and patterns foundational to learning new content, as well as our personal role within the system of learning. By recognizing learning as inherently different than education and professional practice, we come to better unlock our own capacity to shape and define successful achievement through the continuous application of knowledge.

With a goal of creating a shared understanding around learning, we invite you to consider these concepts. Learning is:

- complex
- transformational
- multi-level
- active
- shaped by our bias and prior experiences



***Disciplina*-focused:** the capacity to shape one's future through application of continuous learning. *Disciplina* being Latin for: continuous learning.

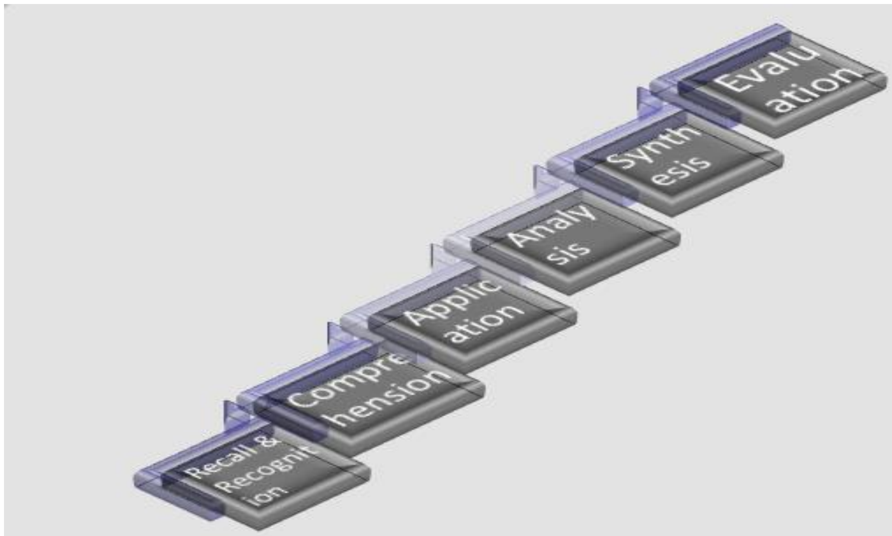
Learning is complex. It is the most powerful process in human development. It leads not only to new ways of thinking, behaving, and viewing the world, but also affects others who interact with us. There are a number of indicators that let us know learning has occurred:

- Moving from one state of being and/or knowing to another,
- Explicit changes in thinking and/or active practice,
- Observable increases in aptitude,
- Making meaning of one's world on the basis of new knowledge and experience, and
- Establishing connections between concepts, experiences, people and skills.

Learning is transformational. Through observation and questioning, developing and strengthening both critical and strategic thinking, and applying knowledge gained through creativity, cognitive thought and evaluative learning we reach a different view of our 'world'; we are transformed. Transformation is holistic and includes individual, creative external, and community considerations for application.

Learning is multilevel. Bloom's taxonomy supports the idea learning takes place on many different levels; yet research tells us the brain jumps between levels with no obvious pattern or progression. "Knowledge is not seen as cumulative and linear, like a wall of bricks, but as a nesting and interacting of frameworks. Learning is revealed when those frameworks are used to understand and act" (Barr & Tagg, 1995, p.21). Brains are built to be challenged and are able to sort through complexities; however, if the brain is over stimulated with a problem which is too complex and too challenging, it will not operate at an optimal level. The key is to find the balance.

Blooms Taxonomy of Learning Objectives (1956)



Low to High-Learning Taxonomy (adapted from Bloom, 1994; modified)

Over the years Bloom's Taxonomy of Learning has been modified and is frequently depicted as a triangle. Simply put, the triangle represents the levels of learning from low to high level. When learning, you will be called on to evaluate and assess information using all three levels of learning. Throughout your studies you will be asked to identify key terms, list, or create a summary of information. Such questions are low-level; however, be warned not to fall victim to tools of memorizing terms and definitions in cases of course work requiring an exam. Ultimately, while the questions might be structured at the low-level, the key to knowing low-level exams is having working through the higher levels of learning to truly have mastered an understanding of the topic.

Mid-level questions will focus on both application and analysis, comparison of concepts to experiences or outcomes and contrasting information or situations. In many cases, you will be asked to relate what you read to your own practice knowledge, experience or perception (paradigm) of a given topic. Learning at this level is often exciting for most individuals; it is typically known as the "ah-ha" moment. However, mid-level learning is not sufficient to truly create transformational change and lasting new behaviors when learning.

High-level thinking questions combine synergy and evaluation. Synergy is the result of comparing complex-concepts to applications/experiences in order to create a new solution. For example, the practice of teaching to learn is demonstration that not only do you as the teacher understanding the material well enough at a personal level, but also are able to help teach someone else the general concepts so that together you achieve synergy by comparing your similar experiences in order to collectively expand your understanding of the concepts.

By relying on and combining all three levels of learning you will enhance your overall learning and retention. By looking for and finding key points; comparing and contrasting information contained in the situation (or test question) with applied experiences, you will begin an evaluative-learning process.

Try your hand at recognizing these three levels to the following scenario. Using a process known as thematic analysis, use three different colored highlighters, identify the low-, mid- and high-levels of learning in the following scenario:

> Sarah is starting a new job as an HR Generalist at XYZ Company. In the first several weeks, she focuses on understanding the general departments she will be working with in her role as a human resource professional. She observes practices of the organization and begins to comprehend the basic foundation of the company.
>
> As she becomes more aware of specific processes and terms used in the business, Sarah starts to compare policies with reference materials. She creates a list of processes and programs in the company. From there she compares and contrasts the list with other practices she has researched online, read about in journals and magazines, and has learned about in her formal education.
>
> Eventually, Sarah establishes three key goals to improve processes in a specific department. She identifies the performance of the department, established improvement goals, and then sets out to implement changes. After several

months, these changes are compared to prior performance. She then revises her goals, and researches further options for improvement in the company.

Now write what you found here:

List Low-level actions:
List mid-level actions:
List High-level actions:

Learning is a spiraling action. The word learning is an active verb. When we understand the active nature of learning, we come to see that learning happens when we proceed through a series of stages. These stages are not necessarily linear or sequential but are often iterative. Each stage is characterized by an action taken by the learner. Moving through these stages, either linearly or iteratively, leads to deep and lasting learning. To this end, courses you engage that use the strategic immersion-service learning concept not only build in stages based on the Bloom's Model, but are created to spiral upward and around core themes. The stages include:

- Exposure
- Thinking
- Connecting
- Storing

- Reflecting
- Understanding
- Planning
- Acting

The result of this spiraling action is an experience that often asks learners to produce work with very little direction at first. This creates a natural first-step benchmark that ensures you are able to continually apply two key processes of thinking while you learn. These processes are described in the coming section.

By the end of the program, you will circle back to the initial assignments but be thinking, acting, and learning at a considerably higher level of performance. Therefore, regardless of the subject, always keep in mind that each week you engage content – whatever the subject matter – we will be asking you to complete various activities that ensure you continue "up the Bloom's" spiraling stair case". In some courses this may include taking many steps at once each week, while in others there are fewer and more lengthy steps to clear.

In either case, the result is that you learn to engage content while forcing yourself to apply thinking models in a pattern of learning that will ensure you not only learn new content, but also learn to change your behavior. Learning, by definition, is ***the often permanent change in behavior*** (SLA, 2012).

Children Intuitively Know How to Learn

Children - -being new to the world - - develop mental capabilities at lightning speed. Although at times their behavior may prompt us to be frustrated or annoyed, they are in fact, demonstrating a complex development of mental and emotional (cognitive and affective) behaviors, naturally encoded learning and applied observed results.

What Do We Mean?

Have you been talking with another adult and a child is in the room engaged in a completely unrelated activity. Suddenly that child interjects a thought, idea, comment or asks a question about the topic under discussion? All too often, as adults, we tend to tell the child "it's more complicated than that" or something along those lines. And what does the child do? Asks "Why"?

Learning involves critical and strategic thinking. The concept of critical thinking traces its roots to the ancient Greeks. The word ccritical means crucial or related to core criteria and derives from the ancient Greek ***kriterion,*** which means standards; or from ***kriticos,*** which means discerning judgment. It is the purposeful application of evaluation, conceptualization, or assessment of information. Critical in this context does not mean 'criticism' or 'negative'; in fact, it is a very positive, forward facing process. It is useful in formulating realistic solutions to complex personal and business issues, deliberating as a group about a course of action to take, or analyzing the assumptions and quality of methods used in creating organizational policies and procedures.

Asking ***why*** is a fundamental tool in *critical thinking process*. Critical thinking is the basis of short-term learning. When children ask 'why' they are beginning to understand cause and effect in a complex world. Throughout the Purposeful Learning Process™ you will learn in this workbook, you will be asked to engage in critical thinking. You will be asked to assess information, clarify goals, examine assumptions, discern hidden values, evaluate evidence, and assess conclusions. Yet, critical thinking is not the sole aspect of learning.

Strategic thinking **plays an essential role in learning as well**. While critical thinking builds our ability to discern complex patterns, make connections, and problem-solve, an often forgotten foundation of learning is the act of thinking strategically. When we are engaged in strategic thinking we are synthesizing information, utilizing our intuition and unleashing our creativity to arrive at outcomes that provide integrated perspectives of the situation, event or condition we face.

Remember back to your own childhood. Did you spend hours either alone or with other children pretending to be someone other than who you are? Did you transform yourself into an entirely different person through the sheer power of your creative thinking (and perhaps a bit of 'dress up' props)? Engaging in this type of 'play' is creating high-level thoughts, assigning and applying meaning to the behaviors of others, real or make-believe. High-level understanding is derived from specific events through this creative endeavor.

Learning Requires Brain Power

Recent research into brain theory teaches us as a result of certain actions brain structures (neurological connections) can be molded, adjusted, strengthened and weakened (Scwartz & Bagely, 2002; Lawlis, 2009). When new and positive neurological associations are formed through thinking, acting and learning individuals demonstrate more healthy emotional and behavioral responses.

The process, while complex, can be thought of similar to exercise. When you start a new work-out regiment, your muscles are fatigue fairly quickly. With regular and repetitive exercise, muscle fibers strengthen and performance increases. Brain functions perform in a similar manner: as purposeful steps are taken to develop the right connections, strength gradually develops and positive processes become used more frequently.

Learning using this approach (like exercise) may feel clumsy at first, but as you apply and continually practice learning with a purpose and plan, you will stretch your learning and expand your basis of knowledge. Overtime, you will find your ability to recall the HR body of knowledge will dramatically increase.

LEARNING THROUGH BREATHING AND RELAXATION

Oxygen is fundamental to brain functioning. You may find when you are under stress you have a tendency to breath shallowly or to hold your breath. This is a natural reaction, but it is unhealthy and limits your capacity to learn. Your ability to think, act and learn strategically is governed by the effectiveness of your brain to function well. To function well, your brain needs a regular supply of oxygen. As you embark on your study program you are encouraged to practice and regularly use techniques of deep repetitive breathing (*adapted from* Lawlis, 2009), especially when you are intently reading, studying and testing.

Purposeful Learning Deep Breathing/Relaxation Exercise

Breathe in through your nose for six counts (heart-beats) and exhale through your mouth for six counts.

1 - 2 - 3 - 4 - 5 - 6 IN

1 - 2 - 3 - 4 - 5 - 6 OUT

Repeat this process for a minimum of five minutes without pausing between inhale and exhale.

Focus on slowly breathing while your stomach and chest rise in one fluid motion. When you first start you may find your stomach raises first then your chest, or vice versa. This indicates you are not deeply breathing. You may want to practice lying down as this may help you with deep breathing. If you find you are breathing too quickly, listen to your heart, count as it beats. This will provide you a regular, steady pattern. When you have become proficient at true deep, relaxing breathing you will find only after a few rounds you have increased your focus and attention.

Commit to practicing deep and purposeful breathing every day. When you find yourself stressed, rushed or lacking focus, stop what you are doing and start to purposefully breathe. You will be infusing your brain with oxygen which in turn centralizes your neurological processes. You will experience increased attention and focus. Using it during your reading and study period will improve your study effectiveness and learning retention.

Learning Through Reflection

Learning is a process that extracts individual expertise through the development of knowledge and thinking. Adult learning theory tells us it is important for adult learners to spend time during the learning process to critically reflect and proactively plan for learning. A key component of the Purposeful Learning Process™ is just that. The act of reflective learning will help you evaluate your own performance through a process of self-mastery (Sternberg, 2008). How do you go about the process of reflective learning?

Through the Purposeful Learning Process,™ which is explained in the next section, you will be engaged in a systematic process of pre-testing to establish your baseline understanding of the each learning module; skimming; noting; outlining; and other learning activities; and post-testing to assess how much information/knowledge you have retained from your study efforts.

The Purposeful Learning Process™ enables you to set your specific strategic and tactical objectives for self-development and evaluate your effectiveness while engaged in learning. This is an important factor in adult learning theory (Vella, 2002; Sternberg & Williams, 2009). Lastly, learning is influenced by our biases and prior experiences - whether or not we remember them. We come to learning as adults with assumptions about how we learn, and often these assumptions are negative and in many cases incomplete or wrong. The Purposeful Learning Process™ is designed to help you identify, examine, and reflect on your biases about learning, your perceptions and paradigms.

Learning Through Perceptions, Paradigms and Mindfulness

Perception is a powerful driver of behavior. Our perception of ourselves, others and the world around us influences how we act, react and respond to any given situation. According to Stenberg (2009) perception is a mental process where individuals observe a situation, recall information, feelings and understanding from encoded memories and then respond to the situation. The word perception comes from the Latin words ***percptio,*** or ***percipio*** which essentially means 'receiving, collecting, action taking of possessions, apprehension with the mind or senses'. Unfortunately, our perceptions are often influenced by fear and ego (negative) motivators, which can influence our paradigms in life.

Our perceptions form our paradigms or 'world view''. Our paradigms are shaped by our experiences, our background, our biases and our culture. Paradigms develop as experiences cause stronger neurological connections in the brain. These connections are like spider-webs and are referred to as neurological synapse (Lawlis, 2009). Although we cannot escape our perceptions and consequently our paradigms, we can shape and reshape them: mindfully. Becoming mindful of how you <u>choose</u> to respond to any given situation: emotional, physical, and/or psychological, you can influence and strengthen the synaptic connections made in your brain. You can dramatically change your outlook by proactively choosing to adopt a more positive thought process.

How often do you find yourself using the words **'I have to'**, **'I need to'**, '**I must'**? When you use this kind of language, it suggests you are not in control of what is happening to you. It is the result of the ego and fear perceptions in life; it is a reactive manner of living (Covey, 1991). When you view the task(s) ahead with dread, trepidation or with negative feelings, check your energy level. How do you feel? Do you feel anxious, tired, stressed?

By consciously changing how you think about the tasks/events/schedule that lie ahead and by mindfully changing the words you think or say about them, your outlook can and will change to one that is positive and productive (Bennett-Goleman, 2001). Try saying: '**I will** '; '**I am going to** '; '**I am looking forward to'**. You will be pleasantly surprised by the lessening of the stress you feel. Being mindful, choosing to view things positively, choosing action over reaction, and breathing deeply will change your outlook positively even on rote life-tasks, study exercises (such as reading this workbook) and more!

Here's a little test. Read the following scenarios:

Attitude A:

My week is a mess! I have so darn much to do; I don't know why everyone expects me to take care of everything. I have that project at work to get finished and get my recommendation to the boss by Friday so she can go on vacation. I have to get the kids to soccer practice today. Oh man, sometime I have to stop and get milk and eggs or the kids won't have breakfast tomorrow. And I have to find time to call Mom to see how she is feeling, but I want to check my social media *sites because I have not been able to in a few days. And at some point, I need to study for the PHR exam; I shouldn't have signed up for it.*

Attitude B*:*
This week is a busy one! I have planned two hours today and tomorrow to finish a project and get my recommendations put down on paper so that I give them to my boss by Wednesday. I want her to go on vacation and not be worried about this project. We are right on track. This afternoon I will drop the kids off at soccer practice and run over to the store to get some milk and bread. I will call Mom tomorrow morning to see how she is feeling. I am going to check my social media sites in between activities. When dinner is over, I am going to sit at the table while the kids do their home and do mine! I am so happy I am getting this certification taken care of now; it is going to enhance my resume.

Which one is more like you? If you sound more like A than B how can you begin right now to change your paradigm? How can you start to be more mindful of using simple and subtle positive-based words to change how you look at your life? How can you move from the realm of victimhood to the realm of positivity?

Learning Through Proactivity and Positivity

Viktor Frankl (1959) gave rise to the importance of our ability to choose our responses to circumstance, situations and events. Often our ability to choose our response is shaped by our fears, past experiences and egos. We allow ourselves to look at situations from a negative point of view or paradigm; sometimes we see the cup as half empty. We often engage in negative 'self-talk', i.e. 'I don't test well', 'I'm not very smart', etc.

Through purposeful action, it is possible to proactively choose to look at situations, from a positive, forward perspective. Actively engaging in positive, proactive choices strengths the neural synapsis in our brains and overtime, our outlook changes (Bennett-Goldman, 2001). A lot depends how you choose to think and feel. You can use purposeful actions and thoughts to help you prepare for the exam. You have a choice to approach your studies from a positive, proactive perspective. The change comes from how you talk to yourself. Instead of saying:

'I have to study,' say 'I am going to study'
'I can't remember this stuff', say 'I will create memory tools to help me'

'I don't have time for learning', say 'I am excited to learn'

Life is a constant challenge. However, positivity has been demonstrated to help people manage stress, anxiety, and life statistically more effectively than individuals who do not (Frederickson, 2009). Positivity is more than positive thinking. It requires accepting life is full of twists and turns and, yes, even tests. Yet by taking control of your outlook, you more readily deal with unexpected challenges and approach life and learning from a positive perspective. You will experience increased confidence which in turn directly impacts your quality of life, or well-being (Rand, 2012).

The more positivity you choose to experience while you prepare for your course(s), paper(s)/exam(s), the more confident you will become. Will you experience stress around the experience? Sure, but planning and being proactive will help to minimize the negative effect stress will have on your well-being. Barbara Frederickson (2009) developed a short Positivity Assessment tool. It is designed to help you assess how frequently you focus your attention on positive thinking. You should plan to take this assessment once a week for three (3) weeks at the on-set of any learning experience (ideally once every quarter). Record your scores each week.

Read through each question and score each using the 4 point scale shown at the top of the assessment:

Assessment of Positivity

You answers should reflect your subjective feelings over the past three to five days. As you answer each question circle the emotion that specifically applies to you and rate your answer accordingly. If none apply score a 0.

0 – not at all 1 – a little 2 –moderately 3 – quite a bit 4 - extremely

		Week 1	Week 2	Week 3
1	How amused, fun-loving, or silly you have felt?			
2	How angry, irritated, or annoyed you have felt?			
3	How ashamed, humiliated, or annoyed have you felt?			
4	**How much awe, wonder, or amazement you have felt?**			
5	How scornful or disdainful you have felt?			
6	How much disgust, distaste, or revulsion you have felt?			
7	How embarrassed or self-conscious have you felt?			
8	**How grateful, appreciative, or thankful have you felt?**			
9	How much guilt, repentant, or blame-worthy have you felt?			

10	How much hate, distrust, or suspicion have you experienced?			
11	**How much hope, optimism, or encouragement have you felt?**			
12	**How inspired, uplifted, or elevated have you felt?**			
13	**How interested, alert, or curious you have felt?**			
14	**How much joy, glee, or happiness have you experienced?**			
15	**How much love, closeness or trust have you felt?**			
16	**How proud, confident, or self-assured have you been?**			
17	What is the most sad, down-hearted, or unhappy you have felt?			
18	How much sadness or fear have you experienced?			
19	**How serene, content, or peaceful have you felt?**			
20	How stressed, nervous, or anxious have you felt?			
	*Number of **bolded** questions you scored 2 or greater (P)*			
	Number of non-bolded questions you scored 1or greater (N)			

(Dr. Barbara Frederickson, published 2009)

Record your positivity ratio for each of the three weeks here:

Wk. 1: ____(P):_____(N)   Wk. 2: ____(P):_____(N)   Wk. 3:____(P):_____(N)

When you answer all the questions, you will count how many of the **bolded** items have a score of 2 or higher. Record your counts in the box at the end of the assessment. Then count how many of the non-bolded items you scored 1 or higher and record as indicated. Now create your positivity ratio, which is the number of positive situations compared to the number of negative situations (P:N).

Understanding your Positivity Ratio

Becoming aware of how you habitually view life situations is an eye-opening exercise. We all have the capacity to view life either positively, negatively or a little of both. We can train ourselves to focus more on the positive aspects of life and our situations. It takes being aware of our own frames of reference and it takes practice. If your Positivity Ratio is lower than 3:1 (3 positive situations for every negative situation), for example if it is 2:3, you need to take steps each week to change your outlook from the negative to the positive. By taking this brief assessment, you will have a baseline you can use to assess your own positivity which you can translate into your study preparations.

Even though life may toss you lemons you have the choice to view it as an opportunity to make lemonade. This translates well to the exam you are preparing to take. Look at the exam as a wonderful opportunity for you to learn and grow in your profession.

Learning Through Perceptual-validity (Rand, 2013)

Draw from your learning about the role of perception. First, type out the questions in the Positivity Assessment matrix (pg. 14); please be sure to include the citation to Frederickson (2009). Then send this to three (minimum) people. Have them rate their *PECEPTION* of your positivity.

1) Accurately type out the questions
2) Prepare an email with the following: *I am learning about leadership and one of the techniques is to understand others perceptions. Please answer these questions not about yourself, but how you perceive me through my actions and behaviors.*
3) **NOTE**: it is suggested that you consider using a free-online survey system so that you can capture the data, but keep participation confidential! Survey-Monkey is one example.
4) **Record the answers and compare the average perception to your own perception**. What can you learn from this?

"Knowing others is intelligence; knowing yourself is true wisdom. Mastering others is strength, mastering yourself is true power". Lao Tsu

Learning through Self-Awareness

Often we get so busy in our lives with all the various roles we fill: parenting, bill-paying, friends, professionals, community volunteer, student, etc. We forget the most important role we fulfill; that of 'self'. It is extremely important as you prepare for any learning program (whether three days, three months, or three years in duration) to make sure you strike a balance in your various roles so that you leave time for yourself and your studies. Ultimately, every leader must have a dynamic and reflective ability to know and listen to their individual self (Bennis, 2010). Therefore, just as we have a choice how to respond to life situations and create our world-view, <u>we have the choice to be leaders of our own life</u>.

The following questions are designed to help you become more aware of yourself so you can better plan and organize your study time and still balance the other important roles you play in life.

These are things you need to think about every week. Just as you schedule appointments to meet with others or schedule quiet time where you work on a specific project, you should also schedule time to check in with yourself and assess your mindfulness, your study focus/attention, your positivity and breathing.

Ask yourself each day: 'How often during the day am I distracted from what I planned to accomplish'? Specify the distractions and identify their cause. Write them down!

Distractions	Cause(s)

When do you feel most focused and energized? When do you feel more tired or when do you have lower energy?

Focused/Energized/Productive	Less Focused/Tired/Low Energy

Think about when you feel most energized and focused, and then write it down. Become conscious when your energy is low and when your energy and focus is high. Notice the patterns. Decide how you can manage the patterns.

Have you remembered to focus on the positive more often than the negative? Write down three positive situations you encounter each day. Use your calendar to identify and record at least 3 positive situations that have touched you each day.

Each week, review and reflect on these:

- Are you remembering to breathe deeply as a way to refocus your attention?
- When you remember to breathe deeply and purposefully do you notice a shift in your focus and attention?
- Does it become easier for you to get back to the task at hand once you have fed your brain with oxygen?
- Have you engaged in purposeful study; or are you lapsing into your 'old' ways of learning?
- Have you followed the Purposeful Learning techniques this week?

Write it down in your notes…!

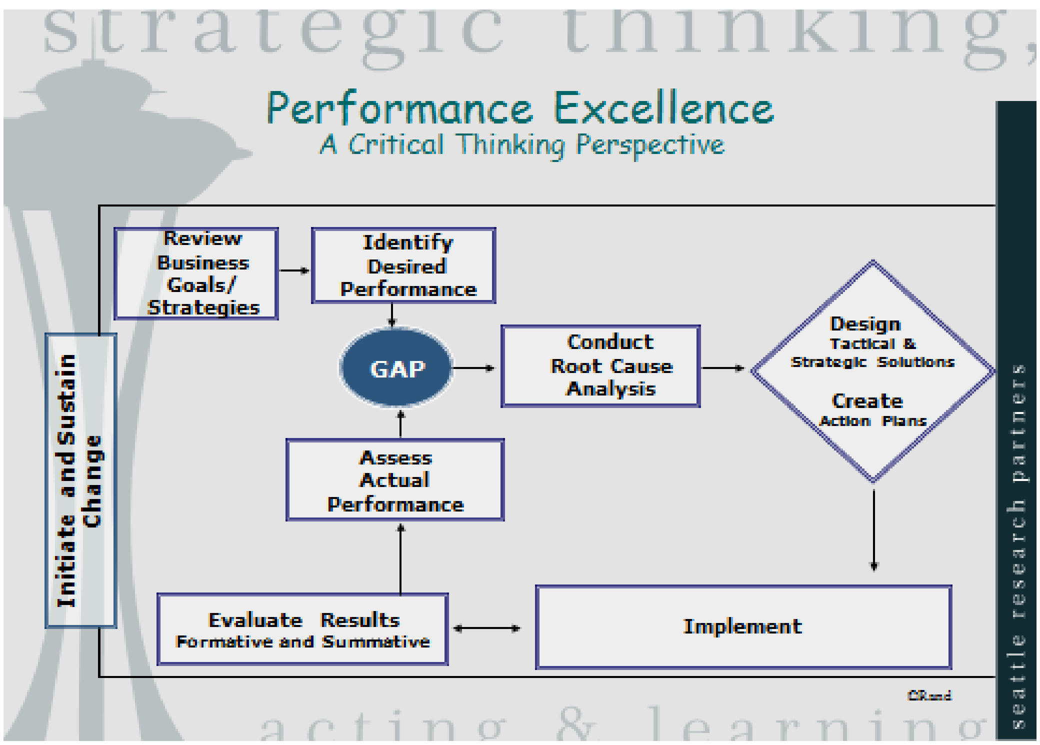
…. Reward yourself!

LEARNING THROUGH CRITICAL THINKING

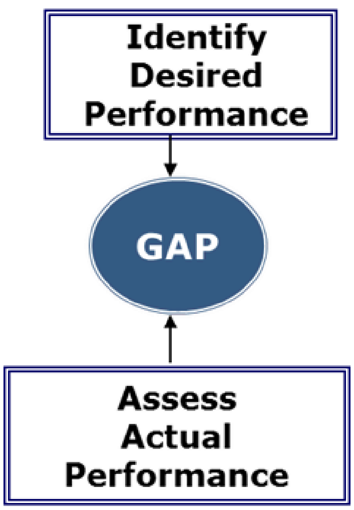
Thinking critically is not just an exercise for a classroom setting. The need for critical thinking abounds in all organizations, especially in the complex and global environment that surrounds us. Organizational decision-makers use a critical thinking ***process*** to develop responses to situations that present unique challenges or opportunities (Rand & Rand, 2009). Thinking critically involves the need to recognize the assumptions underlying your beliefs and behaviors; to use it effectively, you must:

- Eliminate personal biases
- Identify root cause(s) of a problem
- Generate creative ideas
- Establish action plans
- Develop follow-up strategies

We are going to share with you briefly our process for critical thinking because it has application in both the business and learning setting. Below is the critical thinking tool which shows our Performance Excellence Process (critical thinking). For those of you in a class, you may receive this printed tool on a 3x5 or as a pdf in your online course-room). **Note:** situations are more commonly both strategic and critical in nature. Therefore, the tool we provide has strategic thinking on one side and critical thinking on the other/.



The act of thinking critically is both linear and integrated, beginning with the analysis phase and continuing through the implementation phase. Change initiatives and evaluation occur throughout the life cycle of the critical thinking process.



Business Analysis

As a professional at any level of an organization, it is imperative you have a solid understanding of the business goals and strategies driving the organization. It is equally important to reflect on and articulate the desired performance objectives. Once this work is done, you will be able to identify and assess the actual performance of the organization. With this information, you are ready to step through the *critical thinking process.*

Analysis Applied to Your-Self

You can apply this same process to your studies. Substitute 'business analysis' with 'self-analysis'. You must have a solid understanding of your goals and strategies that you have created to pass the exam. You can create baseline information regarding your current level of HR knowledge by following the steps of the Purposeful Learning Process™.

When engaged in critical thinking the most important first step is conducting a Gap Analysis. Unfortunately many by-pass this step and move directly to implementation thus missing the opportunity to truly assess the problem and its cause.

As you prepare for any learning objective (writing a paper, preparing for an exam, developing a presentation, etc.) you, too, can engage in Gap Analysis. As you read through the steps below replace the specific course terms with the modules and sections of each course, program, or learning series you are engaging where you feel you have gaps in what you know versus what you will need to know to pass the exam.

By understanding these steps and the factors that comprise them, you will be able to use critical thinking skills to answer some of the exam questions.

Steps of gap analysis.

Step 1: Conduct a Gap Analysis - Identify the quantifiable gaps or symptoms in terms of: revenue, customer satisfaction, budget, quality or speed (business); or exam scores, total knowledge summary, experience with the topic (Learning).

a. Ask: ***what is my desired performance (results, outcomes, etc.)?*** It must be reasonable and attainable. It should also be numeric in value!

b. Ask: ***how am I currently performing?*** Collect information identifying actual or current performance – whether it is using questions from a pre-published book (most books have questions at the end; a brief performance evaluation with a supervisor, colleague, co-learner, or instructor; etc.), or other resource, always ASSESS first BEFORE engaging in your learning! This is critical to measuring future performance.

c. **Identify and summarize symptoms:** Symptoms are the situational conditions, events, or results indicating you have a problem. Usually anything ***tangible*** is a symptom rather than a cause.

A few examples are:

- Limited growth
- Stakeholder dissatisfaction
- Lack of profitability
- Employee complaints
- Process errors
- Lack of
- Lack of profitability
- Inadequate training
- Turnover
- Mental Depression

communication • Fear

For learning preparation, ask yourself:
WHAT DO I NEED TO KNOW ABOUT THIS COURSE vs. WHAT DO I KNOW?

The difference between what you need to know versus what you already know is the GAP!

Step 2. Conduct a root cause analysis - Seek to identify **why** a gap exists between the desired and actual levels of performance. You must drill to the core of the gap—not simply address its symptoms. For instance, sneezing, coughing, and a sore throat are all health symptoms; however, the cause could be a number of possibilities including a cold, the flu, allergies, or a psychosomatic reason.

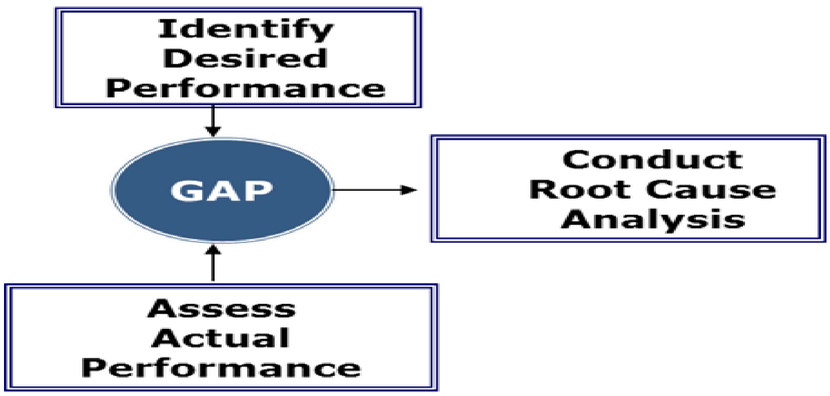
The same holds true for business symptoms. Often individuals and organizations rush to make assumptions about a problem/issue. Although speed and agility are essential ingredients to organizational success, taking time to fully examine an issue to make sure you have arrived at what is really causing the problem, is worth the time it takes in the long run.

There are a number of techniques that can be employed in order to get to the real cause of the problem. Relying on inquiry and observation are two essential tools. When conducting a root cause analysis there are a number of questions you need to ask:

- Is it an organizational problem, i.e. faulty systems, policies or procedures?
- Is it a people problem, i.e. behavior, time allocation, knowledge, skills, desires/awareness?
- Is it an external problem, i.e. core customer, competitors, market context?

How can you apply root cause analysis to your learning? When you identify the gaps between what you need to know for the exam with what you already know; ask yourself these questions:

- Have I known this in the past but the details are fuzzy?



- Is it because I don't have experience in this area?
- Is it because I have not heard of this before?

Learning by: Asking Why?

An excellent tool to help you arrive at the true (root) cause of the issue is called The 5 Why's. This is a powerful and useful question asking method when exploring the cause/effect relationships underlying a particular problem. Ultimately, the goal of applying the 5 Whys method is to determine a root cause of a defect or problem. The following example demonstrates the basic process.

The Problem: *Errors on employee paychecks*

1. *Why?* Payroll is being processed incorrectly.
2. Why? The timecards are not completed properly.
3. *Why?* The employees are recording the wrong overtime codes and the supervisors are not catching the errors.
4. *Why?* The supervisors didn't realize the codes were wrong.
5. *Why?* No one told them the codes had changed.

Depending on the situation you may not have to get to five iterations to be at the root cause; sometimes you may have to ask more questions. Generally speaking five iterations of asking why is sufficient to arrive at the root of the issue/problem.

LEARNING THROUGH STRATEGIC THINKING

The heart of the Strategic Thinking, Acting & Learning model is the utilization of challenges and opportunities to assist you in discovering and establishing effective methods and strategies of thinking. You can use this model to develop tailored, thoughtful recommendations for unique situations you face as a learner, as an individual, or as a business professional.

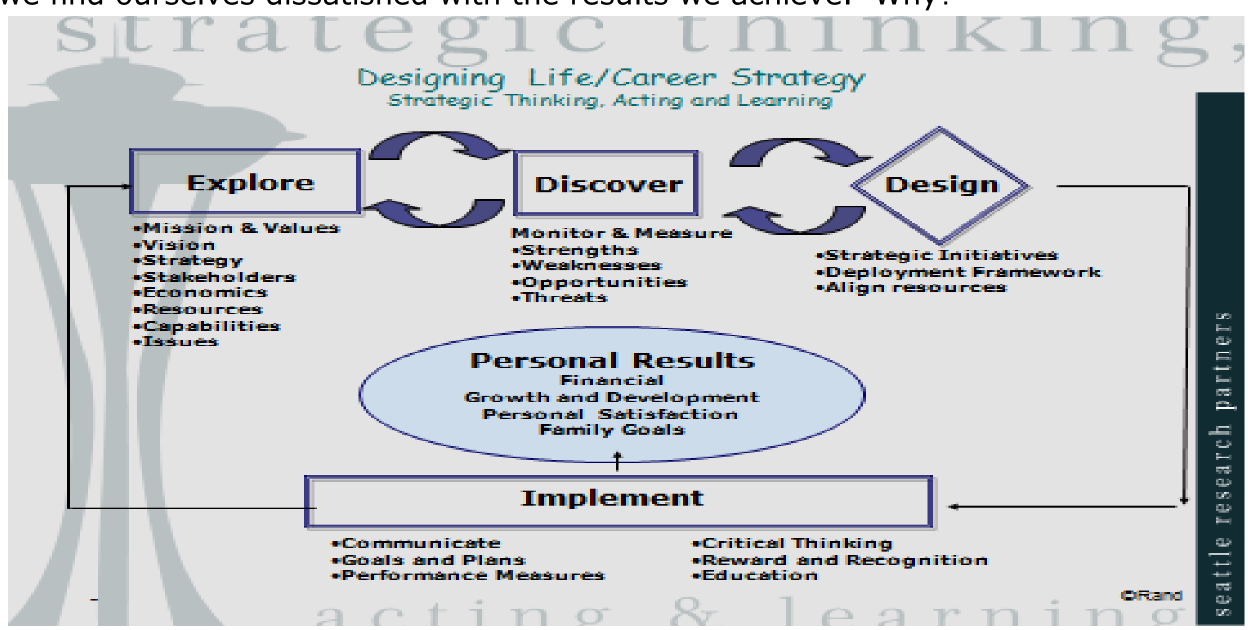
It is designed to present a conceptual guideline to:

- Identify specific patterns and situations;
- Analyze;
- Involves multiple levels of thinking.

Explore

The foundation of the **Strategic Thinking, Acting & Learning model** is ***implementation.*** This is where the rubber meets the road, so to speak. A number of actions comprise implementation. It is the basis for strategic thinking and acting. And it is where most organizations and individuals spend their time.

Yet, often when we spend our time on 'getting things done', e.g. implementation, we find ourselves dissatisfied with the results we achieve. Why?



Because by focusing solely on implementation, we create a pattern where we run the risk of doing the same old things in the same old way, but we expect different results.

In order to analyze why results are different from what was expected, it is necessary to raise our level of thinking to the *strategic stage* of the thinking model: **Explore, Discover and Design.** When you raise your line of sight, you are in a position to apply a different level of thinking to challenging situations and produce results that are uniquely designed to meet your needs.

Discover

You will notice strategic thinking involves iterative processes of **exploration, discovery** and **designing**. Strategic thinking is not linear thinking! The more you explore the more you will discover and so forth.

Explore - *to look into closely; scrutinize; examine; to understand-first!*

Before you jump into studying the materials (implementation), you first need to scrutinize and examine the following:

Resources

- **Time**: how much do you have available to study prior to the exam?
- **Location:** do you have a place to study that is appropriate for your learning style?
- **Study habits**: how do you study best? Will it be better for you to study in large chunks of time; or smaller, more frequent sessions; early morning, late at night?

Issues

- **Family:** what impact will family obligations have on your study?
- **Work:** will you be traveling? Working overtime? A big project?
- **Social:** will you have social commitments that affect your time?

Discover - *gain sight or knowledge of (something previously unseen or unknown; accentuate positive-opportunity by leveraging naturally focused strengths.*

In the discovery process you will identify strengths and weakness and threats and opportunities for each of the issues you identified in the exploration phase. Using tools such as the SWOT analysis you can discover important insights about yourself. SWOT stands for Strengths (internal), Weaknesses (Internal), Opportunities (external) and Threats (external).

Here are some examples to get you thinking:

Strengths	Opportunities	Weakness	Threat

Learning Style	Business Mentor	Lack commitment	Travel/Vacation
Applied	Study group	Lack family support	Big project

Design - to prepare the preliminary plans for a work to be executed; to plan and fashion skillfully; to create mastery, autonomy, purpose (MAP).

You goal is to design a comprehensive plan and document your plan. This provides **focus**, **timing** and **direction** to the implementation.

How to apply strategic thinking to certification preparation

The process of thinking strategically is an essential process in your professional development. By now you have realized there is much involved in obtaining an education (whether it is a single class, certification, certificate, or degree). From a strategic standpoint it is not too late for you to identify and define how you will place your study preparations into the context of your personal, work, and social life. This is ultimately the exploratory phase of strategic thinking.

As you begin to look at your learning program, you will assess what you know (or think you know) and what is less familiar to you. These are your strengths and weaknesses. You will identify external conditions that may affect your preparation (threats) and you must seek opportunities to maximize your study. This is the discovery phase of strategic thinking.

Now you are ready to design a "Learning MAP" (a "MAP" stands for a plan that demonstrates your mastery, autonomy, and purpose which is the fundamental process of drive-motivation; see Pink, 2010). Such a "MAP" is the foundation for applied certification through Strategic Learning Alliance portfolio submissions.

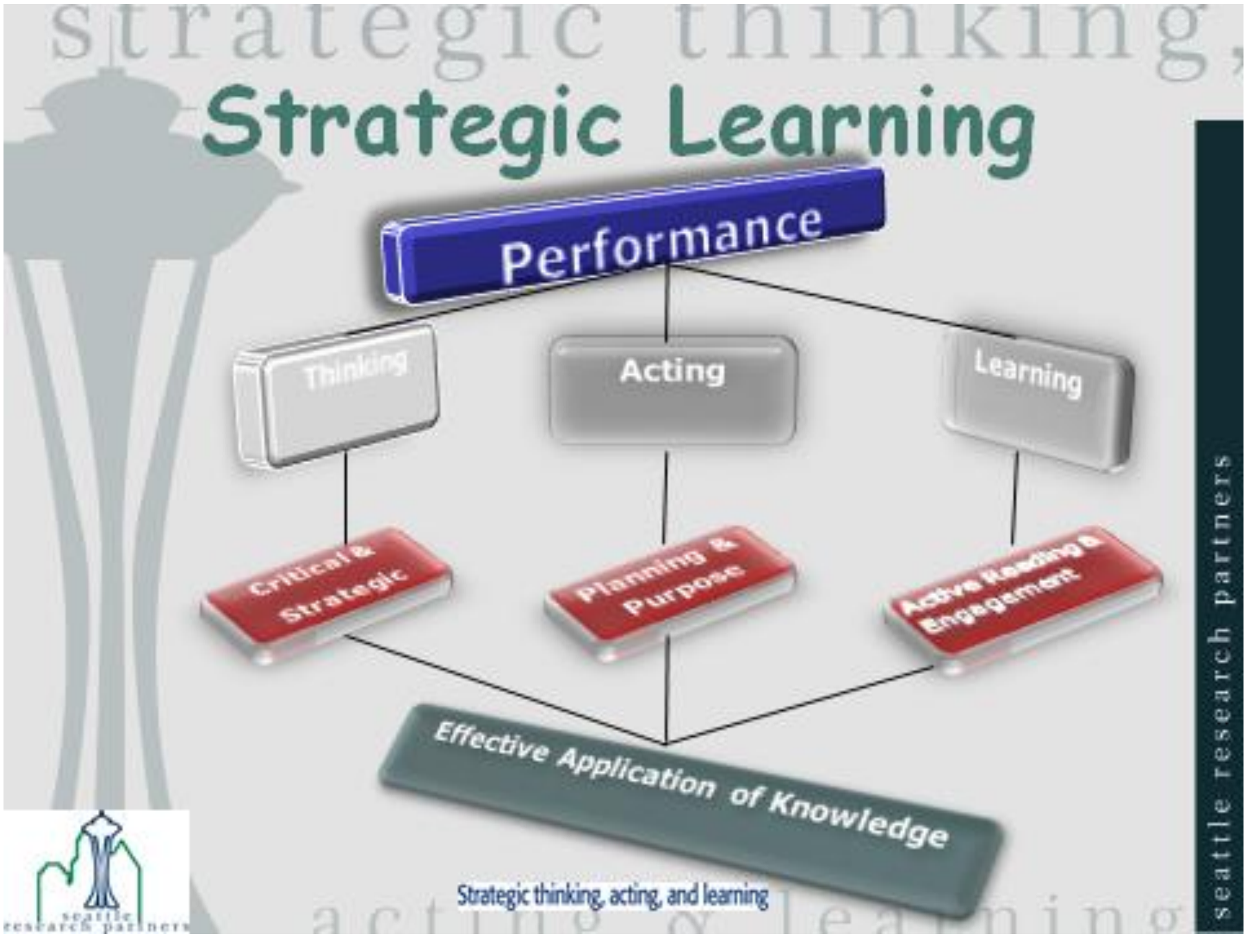
Research shows that less than twenty out of every 100 professionals uses a career or learning "MAP." The result is that goal attainment suffers. Furthermore, research shows that individuals who take the time to clarify their purpose (e.g., learning performance, professional achievement, personal well-being), clarify their goals, and execute with focus by tracking their performance against their "MAP" not only achieve, but exceed performance of individuals with higher level work-experience and knowledge (see Rand, & SRP, 2013; see also PIAL & SRP, 2014). This results in 85% attainment in 50% less time than learners or professionals originally expected when they designed their MAP.

The coming section will help you begin to apply key learning functions to mastering the theoretical connection between creating a powerful personal MAP that connects strategic thinking, critical thinking, and learning. The outcome of such a process is whereby **P**rofessionalism: **E**ffectively **A**pplied **K**nowledge (PEAK)™.

Please take the time to fully apply the learning tools to ensure your mastery of your learning experience. In doing so, you will maximize the application of knowledge by using tools; preparing, assessing, clarifying and then achieving results (see Rand & Mashuta, 2013; Rand & SRP, 2013).

Section Two

The Purposeful Learning Process™



Much has been written about performance; what it is; what it means; its importance. Performance boils down to a simple concept: Performance results from the effective way we choose to develop and apply our knowledge. This is easily remembered by using the acronym of **PEAK** which stands for **Professionalism**: **E**ffectively **A**pplied **K**nowledge. To effectively apply the knowledge we possess, we must continually be engaged in thinking, acting and learning.

The Purposeful Learning Process™ is designed to help you achieve *Peak Performance* by providing you a guided approach to learning, application and action. This process is not passive; you cannot just read about it. You are asked to take an active role in applying the information you glean to your study and preparation your learning experience.

Immerse yourself in the learning process

Purposeful Learning

Purposeful Learning is comprised of three very important and continuous processes: ***Active Engagement*, Active *Reading* and *Active Learning***. Each is an essential component for effective learning.

Active Engagement

The foundation of any successful endeavor is planning and preparation. Just as you would not take a trip across country without first looking at a map, or build a house without a set of blueprints, neither should you 'study' without a plan. Draw a mental picture: world class athletes first visualize the race, the slalom course, the track before they ever begin. By doing this, their mental muscles are engaged, they began with the end in mind… they chart their entire race before they ever start.

Planning and Assessing

Your first inclination will be to immediately start 'reading' your assigned materials. Before you jump into the tactical implementation of your studies, it is important to organize and create a study plan for yourself.

First and foremost, establish your strategic study goal/direction. Remember strategy is a simple "HOW" you intend to achieve your learning goals aligned with your personal vision, mission, values, and objectives.

My Strategic Learning Goal
To:

Life Roles Recognition

Recognizing you fill a number of different roles in life and exploring how these various roles will impact and influence your study efforts over the duration of your selected learning program. Take a few moments to list your key roles and reflect on how each may influence, both positively and negatively, your plan for achieving your learning results. You may find it useful to use the Interrelationship-Mapping tool (See Active Reading Section pg. 34, or the tutorial here) to help you explore through these roles and their relationship to your study commitment.

My Roles	Impact on my study plans/schedule

Time Management

Balancing your time is essential; but do not let time dictate your schedule – assess what you have on the schedule; rank projects, plans, invites, meetings, etc. based on ROLE and priority: learn when to say NO and remember not everything Important is urgent; and not everything that *will* to be done, must be done immediately**.**

Use a calendar: highlight the next 12 weeks; survey the commitments you already have made based on the key roles you have identified above (hint: there should only be 3-5 roles thus 3 to five colors total on your schedule); consider how you will incorporate a balanced study regiment with other commitments and pressures. Identify blocks of time each week and make appointment to do the following:

Set Reminder	Action Item	Complete
	Assess and Plan	
	1) Survey Course Material – Take Assessment exam (if provided)	
	2) Set Study Time	
	3) Review Post-Test results (if necessary for your learning program)	
	4) Schedule Reminders (check off on right side when complete)	
	A) Monitor breathing	
	B) Monitor positivity	
	C) Reflect and Review study notes	
	D) APPLY LEARNING	

Make sure you insert these times into your weekly calendar!

Active Reading

You may have heard active reading referred to as **SQ3R** or **S**urvey, **Q**uestion, **R**ead, **R**ecite, **R**eview. This is a proven method for substantially sharpening your study/retention skills. **SQ3R** helps make reading and studying purposeful and effective. It empowers you to use your time most efficiently. Here's how this strategy works. You may even be telling yourself, '*oh yeah, I know all about this stuff'*, which may be true. But, in order to maximize your learning you will be asked to methodically apply the tool of SQ3R to your study process. Only by applying it, will you acquire the habit of using it effectively.

Because some courses use different types of books, readings, handouts, etc. this section references readings as 'MODULES' – each of you must assess whether a module is a text book, literary book, or study manual based on your specific learning experience.

Survey

Depending on the courses you take; you may have one set of material to read section-by-section; or you may have multiple readings. In either case, BEFORE reading gain insight into your material by:

- Review the learning objectives for each section
- Read the title, headings and subheadings of each section
- Notice words that are italicized or bold
- Look at charts, graphs, pictures, and other visual material
- Read captions
- Look for the key icon(s) throughout the section

Question

As you survey the module, ask a question for each section. *Ask what, why, how, when, who and where questions* as they relate to the content. You can turn the title, headings or subheadings into questions.

Write down your questions. Questions help you pay attention, understand the text better and recall the information more easily later on. Do this on a single sheet for notes, or even in the margin of the reading material. Remember: questions should help you not only understand content, but look for ways to comparing and contrasting to your real-world applied experience.

Read

Read each section at a time, actively looking for an answer to your question(s) for that section. Pay attention to bold and italicized. Pay attention to the information SHRM has highlighted. Be sure to review everything in the section, including tables, graphs and illustrations — these features can communicate an idea more powerfully than written text.

Recite

At the end of each section, look up from the text and in your **own words** recite an answer to your question for that section. Then write down your answer.

Be sure to provide examples that support it. Don't simply think about it! You will repeat the **Question, Read** and **Recite** steps for each section of your assigned reading or audio-learning module.

First ask a question for the next section. Then read to find the answer. Finally, recite the answer in your own words and jot it down. Save TYPING for a review!

The written questions and answers can help you study in the future. Do not make this complex: keep it simple. But, remain consistent through the first few modules and before you realize it, this process will be second nature and habitual in a positive way.

(W)Rite as a Review

After completing the module, review your notes. Identify the main points by looking for the most important idea in each section. Recite, or write, a brief summary of the assignment. It may be helpful to refer to this section on how to write with impact. In doing so you will keep your summaries short and focused; how often have you found yourself writing pages and pages of notes?

By following this process and using the templates we provide you not only will your time investment decrease as you proceed through your scheduled learning program by an average of 30%, but also you're learning retention will be far greater than pages and pages of note-taking (on average if you apply the purposeful process consistently, you will increase retention by three-fold; see PIAL & SRP, 2014).

Review your study notes every week to help you remember the information. You'll find you've created an invaluable study guide.

Reverse outline while you read

A very effective study tool is called a reverse outline. If outlining is something that is done before a paper or book is written; then reverse outlining in done after the fact. The whole idea of reverse outlining is for you to identify the main themes of each of the paragraphs that comprise each section of the module. Reverse outlining takes the place of 'note taking' while you are reading. It has been demonstrated to be a more efficient and effective study tool.

As you read the module, highlight or underline **key** words. (**Note**: do not highlight full sentences or sections – that is one of the poorest learning techniques you can employ). Using one margin or the other, your choice, start to make notes of key thoughts you have related to these key words, jot down questions that come to mind, annotate information that reinforces something you may have read earlier, or how you have encountered these concepts in an applied situation.

You will identify a **main topic** and **at least two sub-topics** for each section that you reverse outline and then outline. When you have completed your reverse outline, not only will you have an excellent review tool; you will have enhanced your learning by exercising two important learning senses: visual and tactile.

By focusing on active reading instead of extensive note taking and mindless highlighting, you have freed your mind to explore concepts in more depth and with more acuity at the end of your reading assignment. You have not interrupted the flow of your reading; rather, you have allowed your mind to build strong neural connections which will help you retain what you have read.

When you first apply the concept of reverse-outlining, the best objective to recall is that you are essentially taking an entire learning module and imagining what the original "outline" was prior to it being fully created. One way to compare your accuracy is to create a reverse outline within a reading module, transfer it to paper (e.g. create an outline based on what you noted while you read) and compare the main-points and sub-topics to the table of content.

APPLY:

When you have finished reading to this point, go back through each section of the purposeful learning template and reverse outline as you review the information. Use the space below to create an outline of the purposeful learning process.

Active Learning

You may have experience learning in the past as passive in nature; primarily listening based. Research shows greater learning occurs when students are engaged in active learning processes: exploring, discovering, processing and applying information. Active learning 'derives from two basic assumptions: (1) that learning is by nature an active endeavor and (2) that different people learn in different ways' (Meyers and Jones, 1993). Bonwell and Elson (1991) state some characteristics of active learning are: students are involved in higher-order thinking such as analysis, synthesis and evaluation; student is engaged in activities: reading, discussing, and writing.

Concept-mapping and Interrelation Diagramming ***(video tutorial here)***

Once your reverse outline is completed, mind mapping and interrelationship diagramming are useful tools to connect and relate the concepts of the HR Body of Knowledge with your practical Human Resource experiences. Concept mapping, or as some call it mind mapping, is a highly creative activity which is a form of 'brainstorming'. It is your opportunity to open your mind and let your ideas and thoughts flow. Remember, since it is a process of brainstorming; don't spend a lot of time wondering if your thoughts are 'right'. Simply open you mind and let the thoughts and connections flow.

Using the main topics from your **reverse outline,** complete the following steps:

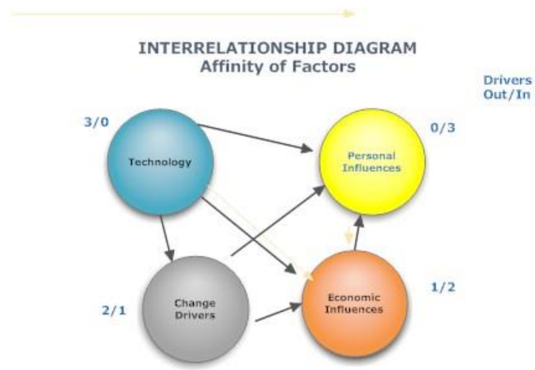
1. Write one of the main topics (in two or three words) in the center of the page.
2. Brainstorm 'what are the key points for understanding this topic?'
3. Draw spokes radiating from the topic labeling them with the key points brainstormed.
4. Draw branches off the spokes and label with minor points or aspects that aid in understanding the topic and the key point. (Steps 3 and 4 may occur simultaneously as learners brainstorm).
5. After all the key and minor points are listed on your diagram, identify how each key points are applied your real-world human resource experiences.
6. If you have a key point that you find you cannot apply to your experience, return to the module and re-read it with an

eye specifically to how that point can apply to your experience. You are purposefully reading the material for a specific answer.

7. You will repeat steps 1 through 6 for each major topic in your reverse outline.

Interrelation Diagram

Using your concept/mind maps, identify 3-5 central themes of the module to create **Interrelation Diagrams**. (Note: the following section of this workbook includes a template for you to see how to apply this learning tool).



1. List the central themes on a sheet of paper and place them in the semblance of a circle.
2. Number each theme in the circle
3. Starting with theme #1, ask yourself: Which of the other themes are related to it?
4. Ask yourself: Does theme #1 influence the other themes or is it influenced by them?
5. Draw an arrow indicating the direction of influence from one theme to the others.

What you will see from your Interrelation diagram are the themes from the module(s) that drive your learning topics. The themes with directional arrows showing influence on other themes are the critical themes to understand.

Using the information from your Interrelation Diagram, your mind maps, and your reverse outline, write a three to five paragraph evaluation for the module you are studying. The following section describes a very effective tool for synthesizing and ordering your study efforts thus far.

Outlining

Everyone knows how to outline, right? Unfortunately, this is not the case. Often times we have not been taught the basic, but essential, process for outlining. By now you have learned that this book focuses your attention on the application of processes that fundamentally improve your applied learning results. To this end, let's review what is needed to create an effective outline!

An outline is a systematic process for capturing the key themes of a particular topic (read or lectured). It is often best for individuals who enjoy creating a linear structure to understanding a topic. While human minds, and many life-situations, are not linear; an outline is the most common tool for creating papers, books, and business plans. The challenge of learning without an outline is the tendency to fail to prioritize key themes of a given situation.

To create an outline, there is one key fundamental: process-structure:

1) HEADING/Main Point #1
   a. Key Term
      i. *Evidence*
      ii. *Analysis*
   b. Application
      i. *Personal*
      ii. *Professional*
   c. Transition/Summary

2) Heading/Topic #2

By reviewing the structure above, you will note that the outlining process should reflect Bloom's Taxonomy defined earlier in this book. To be effective, your outline should have IMPACT by using the MEAT model (this is further discussed in the next section). An outline, unlike a paragraph or paper, is meant to start with key words or phrases.

Gradually, this is converted into full-sentences (based on heading, evidence, analysis, and application). You start by listing main-point. This should then be followed by key and relevant terms (low-level learning). By brainstorming or identifying the key terms, you should then proceed to provide comparison (analysis) and application.

The structure above attempts to summarize a key fundamental of an outline: headings/sub-headings. An affective heading will have at LEAST two sub-headings. If not, then it is not a qualified topic/heading. Furthermore, each sub-heading should have at LEAST two points of reference. This can include additional evidence but also application. One simple method to ensure you have a proper structure is to ensure that each sub-heading references application in multiple domains (e.g., business, personal, social contexts). In this manner, you are creating an outline that uses an impact-process and will result in more dynamic paragraphs and learning review when you use your outline. (Note: when a sub-heading does not have at least two points of reference, then there should be nothing under it. If you create a subheading with only one point of reference, either analyze and apply more deeply, or remove the item as a key subheading – see above *subheading C*).

Writing with Impact (MEAT model)

Writing with IMPACT using the MEAT model stands for Main point, Evidence, Analysis and Transition. The basic paragraph should consist of four to no more than seven sentences (Rand, Rand, & Rand, 2012). That's right! It is that simple! By using this approach, you will deliver impact and quality to very concise statements packed full of understanding, analysis, and evaluation.

- ***Main point**:* The main point introduces the concept covered in the paragraph.
- ***Evidence**:* Evidence is support for what you write. Can you site examples or have you read information that supports your point of view?
- ***Analysis**:* Analysis occurs when you compare or contrast information related to the main point and evidence. This can be one or two sentences. If it gets to be much more, then chances are there is a need for two paragraphs instead of one.
- ***Transition**:* Transitions are words and phrases that serve as bridges from one idea to the next, one sentence to the next, or one paragraph to the next. They keep the reader from having to find his or her own way and possibly getting lost in the reading. It is usually good to strive to have transitions from one paragraph to the next.

IMPACT/MEAT Papers (& Bloom's Structure)

When you are asked to write a three to five paragraph summary of a module, remember to stay positive: it can be done. By using these tools listed above, begin your first paragraph by demonstrating you understand the basic themes (Low-level learning). List these themes while writing with impact using the MEAT model to include citations of scholarly support, analysis of these key concepts, and then transition into the body of the paragraph. This (above) is a basic introduction to a paper or written statement using the MEAT model and Bloom's structure.

Second, write the body of you summary (paragraph(s) 2-4), by focusing on your analysis of the learning module. Do this by referencing the reading material with regard to your applied experience. By providing evidence and analysis in the body of the paper, you lead the reader through the middle-levels of learning (see Bloom's method). In other words, the body dissects, analyzes, and applies each key point of the introduction in greater detail to enhance the reader's understanding of the key points.

The final paragraph is where you evaluate (the highest level of learning): synthesize your writing! Continue to use the MEAT process for each paragraph(s) of your conclusion. In this manner, you effectively convey a vast amount of information; you support your final conclusion with cited evidence, and you properly analyze through application. In the end, your paragraph(s), paper, or book can literally be reverse-outlined or concept-mapped with ease. As a result, your reader is also walked through a great deal of learning with each and every paragraph you have written using a consistent process.

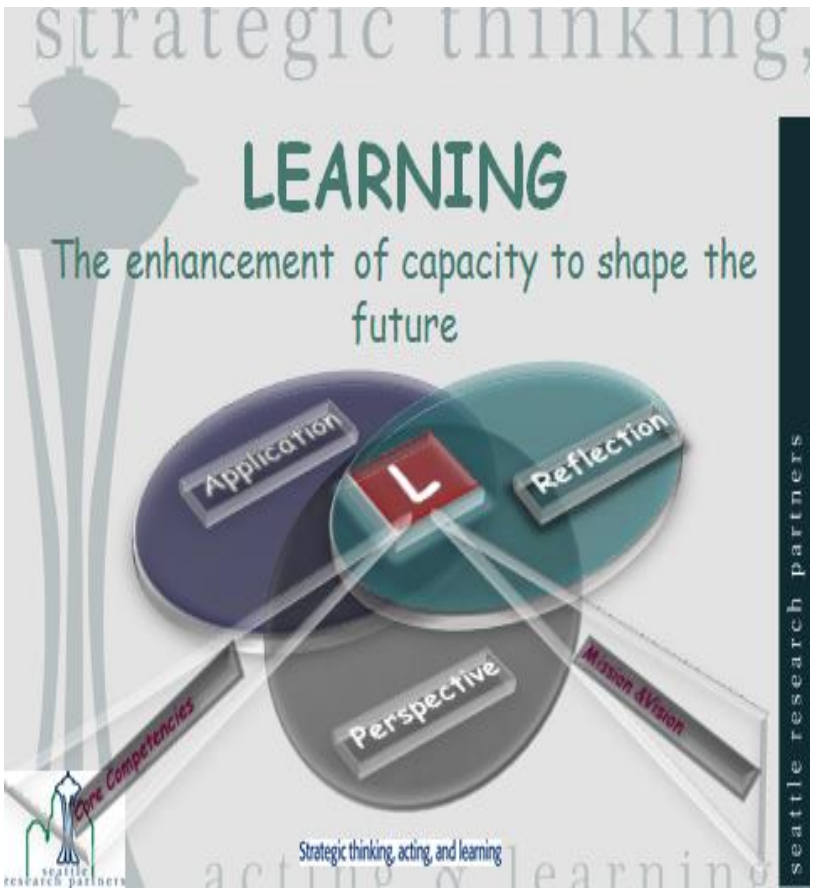
For an example of writing with MEAT; review this learning guide. Highlight a paragraph or two. Notice that MEAT can be a 4 sentence impact statement, but no more than 7 sentences (See Rand, Rand, & Rand, 2011). Also, sometimes you may have a need to reference more information. In this case, your paragraph might be Main point, evidence, evidence, evidence, analysis, and transition, etc. or some other variation of the MEAT model.

As you will see when you analyze this book for examples of IMPACT/MEAT models of writing, nearly the entire book is structured using MEAT/IMPACT writing consistent with the Bloom's method.

Summary

We provide you a number of different learning tools for a reason. Results have shown for our prior learners achieve over 3-fold improvements on knowledge, retention, and learning-stress-reduction by using these tools and the Workbook template which follows this section (Rand, Rand, & Rand, 20011). It is essential you practice learning by using a variety of tools to find those that resonate with you the most. You have your own style of learning, so testing different tools helps to unlock the learning receptors in your brain. Initially you may find some of these tools to be uncomfortable, ambiguous or just 'not you'. But, we encourage you to make the choice to keep working with them until it is second nature to you...

Section Thee:
Comprehension & Application



You will read the following text and apply several of the skills you have learned in this workbook **WHILE** you read. Using these tools and techniques will help you understand, analyze, and evaluate at a much higher level as an applied professional.

You have taken/created your first base-line test (if participating in an SRP sponsored or provided course) which provides you an assessment of your strengths and the gaps you may have relevant to the learning content. Now it is important for you to self-reflect. List the areas that you perceive as strengths, gaps, and opportunities for success in this area.

Strengths	Gaps
What Surprised You?	

1. **Craft a positive learning statement** leveraging your strengths as an individual to the various topics you will learn in order to shore up the gaps you

have identified. This statement is intended to be your guiding statement of purpose regarding your learning performance and experience. Remember to WRITE WITH IMPACT (using the MEAT process)!

My Positive Learning Statement:

See syllabus/course room – note learners may need to upload this section as working sample if registered in a program hosted or sponsored by Seattle Research Partners, Inc.

Understanding Leadership

Gain a deep understanding of the learning topics by asking the following question and answering in the space provided:

How do you define Leadership?	Write your definition here (bullet points or no more than 4-6 concise sentences (WRITE with impact by writing with MEAT!) NOTE if you are in a learning program, this was completed week one as a discussion, do not repeat.
Leadership is:	

Survey *(skim)* the module (pages 43-60); look for key concepts and/or terms relevant to you and your professional experience. Look for words that catch your attention.

DO NOT READ THESE NEXT PAGES, USE SQRR

You will be instructed <u>WHEN to READ</u> pages 43-60*

*There are templates to complete following this section BEFORE reading; to locate the frame-work skim the pages below; complete the framework and then read when indicated in your learning syllabus.

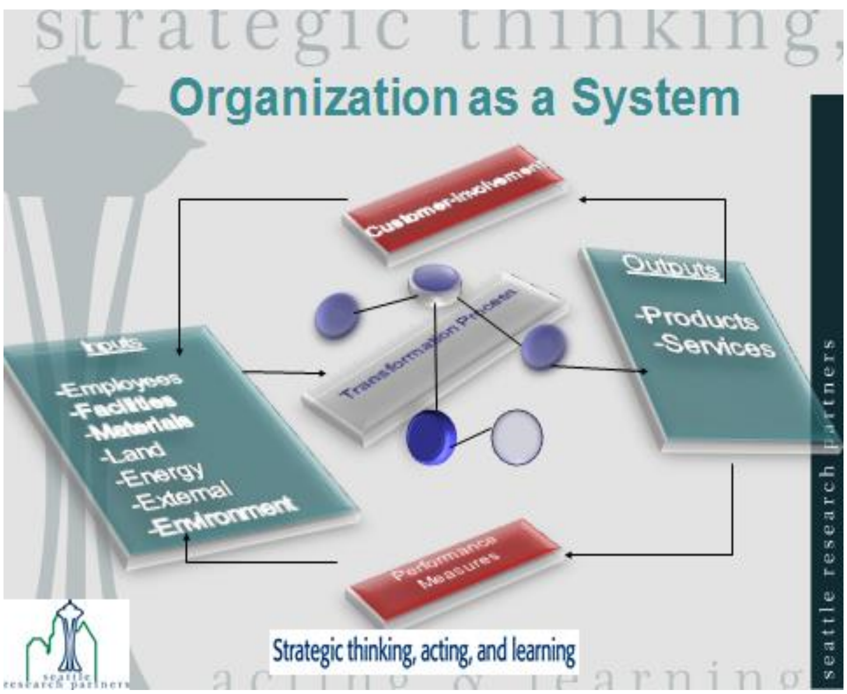
Organizational Well-Being: The Employee Centered Approach

An organization is a complex system. It is a system of made up of many processes. However, these processes involve human capital and not just strategic capital (facilities, assets, etc.). Therefore, an effective organizational leader recognizes that each individual within the organization is also a complex system (see Rand & Rand, 2010). Each team of individual's represents a complex group-system that in turn represents team processes as well as individual-contributors.

Individual-contributors (team-members) represent their own individual-system. As such, to engage an organization for the purpose of development requires a leader to holistically understand the well-being of the organization. This necessarily requires consistent process be applied to:

- Modeling leadership by helping each individual share an inspired vision for their role within the organization (as well as life outside of the organization).
- Alignment of teams through clarifying objectives and the relationship of individual contributors on the team, as well as the relationship to the team to other teams, departments, and ultimately to the holistic organizational system.

The theory of well-being is achieved through the science of purpose. Purpose is the capacity to shape the future through the achievements resulting from applied strategic thinking, acting, and learning.



Having completed the reading and requirements of this book, you should now have obtained a basic concept of the following:

Learning – a process of gradually changing behavior in a relatively permanent manner (SLA, 2011/2014). Learning is an evolving process that is ever present in the lived experience of all human-beings. Professionalism: Effectively Applied Knowledge (PEAK) ™ tells us that in order to maximize effectiveness, individuals balance performance and experience through the regular application of knowledge. To this end, learning – much like life, business, and sports – requires both performance and experience defined by the use of process thinking and acting.

Process Thinking - the key to success in any business venture or personal development experience is the role of process thinking. There are two systems we provide you in this book: Strategic Thinking and Critical Thinking. Strategic thinking focuses on exploring, discovery, and design of long-range mission, values, and purposes (distal-goals). These result in specific, measured, action-oriented, and realistic goals. Critical thinking is a process of understanding (learning) a situation and analyzing symptoms versus causes. Critical thinking (tactical-goals) occurs by conducting an assessment to determine gaps within desired performance outcomes (Rand & Rand, 2010). The process of critical thinking then requires making short-term changes and goals that will lead toward the achievement of specific long-term goals. *Situations may be either critical or strategic in nature; in fact, often times they are both.*

Coaching - by reviewing this presentation, postings, and your material (having applied the Strategic Learning Guide for coaching) you should have come to understand that coaching is a process. The process is one for leading individuals toward recognizing their strategic and tactical performance capability, needs, and goals. Coaching requires that an individual act first as a leader through self-coaching. This book, holistically, is a guide (a coach) to your learning. The objective lessons of Professionalism: Effectively Applied Knowledge (PEAK) ™ help you develop the foundation to helping others learn (you as a coach); but does do by helping you improve a process of relatively permanent behavior change through self-reflection, awareness, and accountability (the definition of learning-based coaching).

Negotiations – unlike coaching, where the objective is to empower an individual through (com)passionate listening and accountability to deliver their highest and best contribution, the process of negotiations requires the movement of groups of individuals toward a shared and inspired vision. Many applied leaders, however, confuse sharing THEIR vision, with the process of negotiating to create a SHARED vision. The effective negotiator will work with individual and teams to clarify objectives, align systems, and modify plans. Unlike coaching, a negotiator may often deal with competing interests, such as client-vendor relations, department teams, or even executives and subordinates. This process, therefore, resembles coaching when applied for a win-win purpose. It further uses the approach to asking questions and spending considerable time understanding the position of those involved before moving forward to crystalize, align, and define outcomes.

Individual-Contributor- An individual requires several processes for developing as a leader. If you imagine a circle (the inner circle is the area of control while the outer portion of the same circle is the area of concern), *The Seven Habits of Highly Effective People* (Covey, 1991) teaches us that these circles represents the inner development of an individual. Through the regular application Professionalism: Effectively Applied Knowledge (PEAK) ™, people expand their inner circles and gradually obtain more influence over areas of their lives that may be of concern (but not necessarily in their control).

Leadership, therefore, is a state of mind and not a given role. It is a state of mind any individual can choose to exercise and develop. By starting with their own ability to exercise greater control in life, individuals can more effectively help build better relationships. In time you will come to see how this individual leadership state of mind (personal effectiveness, or personal soft-skills, or behavioral-contributions are all common terms for the concept of being an individual contributor/leader) results in expanded team effectiveness and leadership within the organization - regardless of their given role and title!

Organizational Development - an organization is a complex process much like learning. It is made up of smaller systems and processes that combine to create a whole. However, for organizational development to be achieved, an approach that seeks well-being is necessary (Rand, 2013). To this end, proper organizational development begins with *Who* and not *What* (see Collins, 2005). The key concept from your reading so far should have been the <u>absolute necessity</u> of creating a score card to measure important and countable aspects of your individual learning; the same concepts apply for each individual, each team, and each department within an organization. By creating score-cards focused on *Who*, each contributor can work to expand the collective circle of influence (see Covey, 2004) so that you can be ready to help your team move toward good, then to great, and finally excellence.

Well-being is best initially understood at the *individual-contributor* Level.

This selection defines well-being in a manner to understand the relationship of the development of an individual-contributor as part of a systematic process to development of an organization. A person's well-being is made up of domains and elements. Domains are influenced directly by individual's personal missions (known or unknown), values, and principles which consequently require gradual efforts (habits) over-time to influence and change (see Covey; 2004; Rand, 2012). Domains are categorized by mind (mental/educational), body (physical), spirit (transcendent), and heart (emotional). However, it is important to visualize that well-being is multi-dimensional: think of a globe.

A globe is a sphere. The sphere, when light is cast on it from an exterior angle, will produce an oblong shadow on the polar opposite end of the light; this shadow is the external projection of components of an individual's well-being (Frankl, 1959; Ed & Diener, 2008). This can be most easily translated to the perceived perception that the exterior world (other people) see and know about someone; their paradigm with regards to the external perception of another person's external personality (see Covey, 1991). This will become important later.

For now, focus on the inner-workings of the globe. On the interior you have a core, the heart/fire, of an individual. This is their innate core-values; their personal passions. The crust and mantle are the physical manifestations (or components) such as continents, bodies of water, and other external representations of what occurs on the inside. This is in many ways visible to some directly; but is also the protective layer that allows a shadow to be cast – for this reason, people's personality may resonate with some, but turn-off others.

The air within the globe is similar to the mind. The mind is constantly working and present; affected by continual rotation of the globe. The mind constantly takes into consideration influences of peak experiences and peak performance (Rand, 2012; see Maslow, 1959). To imagine this relationship, think of peak experience and peak performance as lines of longitude and latitude: both separate, but equally necessary to identify specific elements of a globe.

The ozone represents the spirit of an individual; their transcendent abilities to expand beyond themselves in physical and metaphysical ways. In cases and instances it may be totally invisible to people; including the person represented by the globe. Yet, it is constantly present. It is the force by which all life is possible, and stems from evolutionary development dating back to the creation of the universe (see Rand, 2010). To accept its existence is unique in every situation, but to describe and define another's spirit is as impossible as is to bottle up a bit of our ozone here on earth.

These domains, like the earth, are forged by various influences, life events, purpose, internal challenges, and external (think asteroid for a continuation of the example) impacts. Thus, the globe is still altered and forged by elements: brief occurrences that include more direct external components but that can still influence the globe: even as deep as the inner-core.

These elements are best defined by: social, financial, vocational, mental and physical. The elements take into consideration the spirit and emotional (heart and sprit domains) exist, but are unique to each individual and not properly defined by external "globes" (Rath & Harter, 2012; see also Einstein, 1949; Jung, 1951). Therefore, the two primary commonly 'seen' domains directly impacted by external elements (mental and physical) components are included in measurements of well-being on daily basis (think: the air, wind, weather are mental conditions that can cloud and impact physical appearances and are constantly exposed to the outer influences which allow for tested measurements best known as "scientific process.")

How do you process elements vs. domains?

Elements are best measured on a repeated basis: critical assessment (see critical thinking model). The Gallup Institute has created a dynamic process for tracking both measured and described daily, weekly, and monthly influences of well-being (Rath & Harter, 2012) known as the Daily Well-Being Tracker ™ (*readers are strongly encouraged to use this tool, or a self-created tool for critical assessment of their well-being elements. To do this, simply create a numeric scale based on questions relative to the elements of well-being; rate your-self; ask others to rate their perception of those element based on your behaviors. Analyze those results for "gaps." This process of face and perceptual validity creates a robust self-awareness tool. See Rand & SRP, 2013; see also SLA, 2011-2013*). The

Well-being tracker, while valuable, unfortunately does not take into consideration external perceptions (think of the shadow cast by our personality versus clear images of our mental and physical domains). Therefore, there are two options. First, well-being should include 360 degree feedback from external sources. Or, an individual should deploy positivity (see Rand, 2013) to choose awareness of how external influences are considered as positive opportunities or negative threats (more on this topic later).

Ultimately, the critical measurement of elements can help an individual assess the influences on more long-standing domains of well-being. Domains are strategic, the shift gradually like the tectonic plates within a globe. As shifts occur, external conditions and representations also change. However, over-time these can be rather gradual and unknown. This is not to say a major life element cannot force more immediate change of a domain; however, domains should best be kept in recognition of long-term goals, changes, and improvements over time.

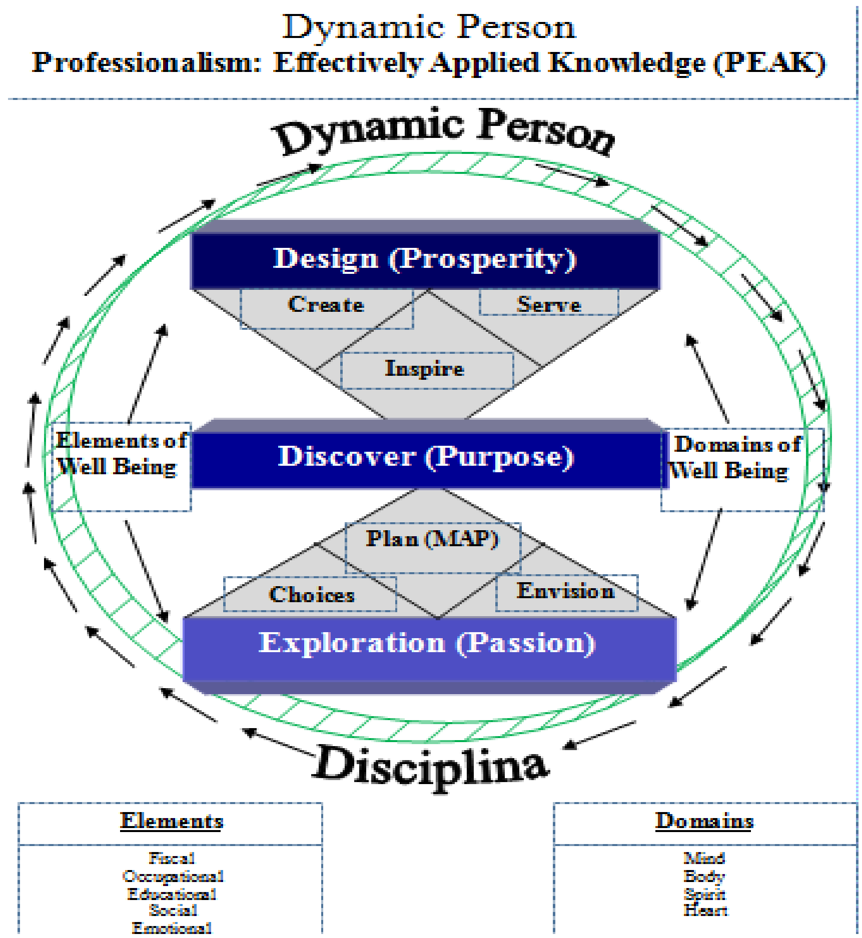
Relationship to individual development?

The choice (Habit One; see Covey, 1991) to engage in a life-long process for self-development or even a critical development influenced by external elements (i.e. a boss) requires the continual improvement in all domains and elements of life and not just one. Remember the image of a globe? An asteroid impact on the North Pole will create alterations on the entire system. Thus, development might be localized for tactical purposes, but will only be effective understood relative to the entire system.

So far we have come to understand the role of well-being as global domains and elements (that are both internal and external influences; short-term and distal as well). The process of well-being includes an individual moving through the levels of effectiveness to move toward inter-dependent states (see Covey, 1991) within each domain and element of well-being. Therefore, the review will shift from the individual as a functioning system with internal and external processes influencing the system, to the expanded view of organizational development (the influencer's role within a team-system).

Seven Related Stages of Individual-Contributor Development.

The Seven Habits of Effectiveness is a process for personal mastery. There are key foundations to understand first before applying each of the habits effectively (Covey, 1991). The primary foundations are the concepts of circle of control/concern; production capability; and perception. A key concept about these foundations is the recognition that developing the habits is continual. Individuals must always achieve balance and exercise demonstrated effectiveness to expand their personal influence. To this end, a person must establish a systematic process for gradual improvement so that they produce effectively overtime.



This section summarizes the PEAK stages of learning relative to optimized performance and experience. These are drawn from evidence known for decades including Seven Habits of Highly Effective People (Covey, 1991), empirical psychological research of well-being (Carruthers & Hood, 2007) and more recent empirical research rooted in Professionalism: Effectively Applied Knowledge (PEAK)™ (Rand & SRP, 2014; PALI & SRP, 2014):

Choices - being proactive is the first step Habit defined by Covey (1991). *Opportunity-Positivity* is a mental perspective whereby, individuals recognize and choose to influence control between every situation (stimulus) and response (re-action); the choice to see the value of a controlled response toward the achievement of greater future outcomes that might not immediately be clear. Postulated by Frankl (1959), this experience is recognition that every situation – no matter how complex and challenging, presents opportunity. At minimum, there is the ability to CHOOSE a pro-active response that does not negatively react and harm states of individual well-being.

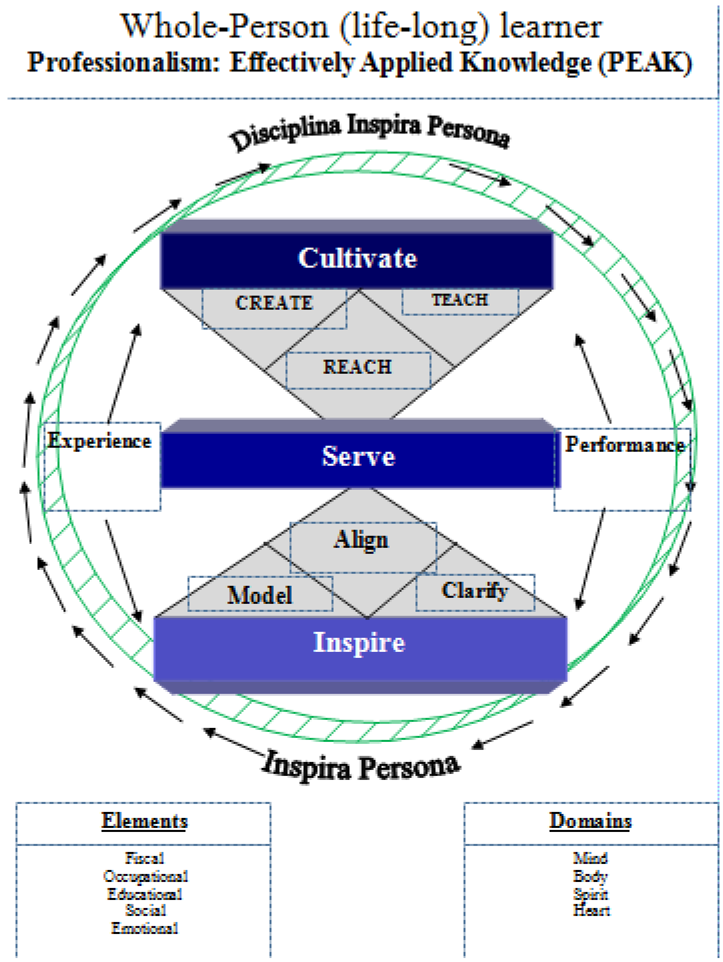
Thus, positivity requires the willingness to shift our perspectives; to embrace optimal results even to the more immediate benefit of others and not necessarily ourselves; to choose not to allow circumstances to dictate our future, but our own chosen life decisions to create our future. It is based upon the concept of create twice and implement once: the ability to exercise control by assessing, planning, problem solving, and then improving. This is the foundation of Professionalism: Effectively Applied Knowledge (PEAK)™, for in every situation exists the opportunity for learning and the gradual change in our behaviors through proactive focus on choosing to be *who* we want to be, opposed to merely *wishing* to be *who we want to be.*

Visionary – Habit two, the End in Mind, is our opportunity to create-twice a chosen future of success (Covey, 1991). To develop the visualization skills of a great contributor, they must learn that value to "seeing" holistically and distally where they wish to be at a future point. All too often people will seek an opportunity, only to fail to proactively ensure balance in the experience and performance of that new role. By beginning with the end in mind, effective individuals see a clear vision for their life and professional roles.

Consider this: to go on a road trip without a map and key destinations, is purely responsive. But, to create a map of where you want to visit; to list the key destinations to visit along the way; and identify several routes and methods of travel is to apply visionary-steps to developing a great trip. Professionalism: Effectively Applied Knowledge (PEAK) ™is the opportunity to choose the map of living we desire, and consciously envision what the performance and experience will culminate in as we make the regular choice to mold ourselves into alignment with our personal "MAP".

Planning- Our personal "MAP" can be defined as: mastery, autonomy, and purpose (see Pink, 2010). Covey describes the third habit as the actions of self-management. Before we can expand our foundation of influence over the trails in life, we must choose to manage our lives based on the necessary goals to meet our end in mind. By using planning as a consistently chosen first-step before action, individual-contributors enhance their conceptual strategic vision, and properly understand our roles, prioritize based on our mission, vision, and purpose all through applying process-thinking models. By learning to avoid short-comings such as too much time invested in invaluable/non-urgent thrills; or avoiding focus on IMPORTANT/non-urgent tasks, we become more efficient in our accomplishments. By becoming more efficient while working toward KEY GOALS supporting our PRIORITY roles, we are recognized to be effective individuals by others. As this occurs, our opportunity to influence and build trust expands. Covey (1991; 2004) defines similar occurrences the speed of trust that increases our sphere of influence. Planning is the essential first step to such achievements.

This is the phase when a leadership shifts from continue focus on the self; and progressive focus on their interactions with others. The interpersonal result can be defined as two course stages of inspiration and creation. The inspiration and creation are what culminate in the enhancement of a dynamic individual-contributor: one who successfully remains attuned to their ever constant opportunity to learn; who creates new opportunities while enjoying the experience; and who inspires others through creative, expressive co-active recreation. By achieving these stages of individual-contribution, leadership becomes clearly a state of choice and not a title. The conscious choice to create a personal "MAP" that aligns our elements and domains of existence necessarily is the foundation for increasing our ability to achieve.



Inspiration: In the Seven Habits (Covey, 1991) habits 4-7 are the habits of building relationships in an inter-dependent manner. It is this experience that we seek to shift our perceptions and FIND opportunity in all challenges by intentionally using processes to help other think-through complex situations and find simple opportunities for clarity and achievement. This is an innovator mentality that anyone can harness through application of consistent processes and stages of holistic well-being.

Service: Covey defines the process in Habit Five of engaging others for the purpose to understand first, BEFORE seeking to be understood (1991). The concept of service is the culmination of awareness and belief that is so intense, an individual leader endeavors to engage others; to hear and listen with such an open heart, that they will give of their time without concern on profit-first. As a result we shift more toward an abundance-mentality through the creation of our proactive personal "MAP"; we generate increased synergy with others. While there are a great number of terms applied for such immersion-based experiences, the transcendent descriptions often contribute to our spiritual well-being. In other words, the more we work to help others contribute their highest efforts; the more frequently we will help uncover new positive opportunities regardless of the situation. It is in these instances where two individual-contributors help produce results that can change the world in dynamic ways, no matter how small.

Creation: peak learning occurs as we achieve the experience and performance results of rejuvenation and cultivation to create the desired states of being in all domains and elements of life. It's the stage that reminds us that all prior stages must be regularly evaluated, improved, and not just performed, but also experienced. All too often individuals will engage a passion without a planned process; or will engage a career without reminding and enjoying the cultivations of life outside of work. To create a life of well-being is to achieve Professionalism: Effectively Applied Knowledge (PEAK) results, learning in all situations is necessary so that our performance and experience culminate into a life worth living.

Recreation allows us to seek-out new experiences, to live, grow, and learn by doing something physically, mentally, spiritually, and emotionally rewarding (see Hood & Carruthers, 2007). Furthermore, it provides us a unique and personalized way to portray ourselves (Rand, 2014*).* It is important to note, that people can be entirely effective in one domain of life; or multiple elements of well-being. However, leadership development requires awareness (of the self and others), balance (domains and elements), and continuous-commitment (*disciplina*-focus) to ensure lift-dynamics. Thus, cultivation of our selves requires that we create lasting relations and seek opportunities for continued opportunity through cultivation with others.

This is a process that draws from the experiences our personal MAP but result in the outward ability to increase our levels of trust with others by seeking to ensure their improved development and achievement. The result is a cultivating experience for both individuals defined as synergistic, synchronicity, and transcendence. These stages present a process monitoring the key elements necessary to maximize peak learning as an individual-contributor. In time, the greater the emphasis on individual development naturally influences the inspiration, service, and learning of those engaged with that individual.

Process Thinking

There are two models of process thinking that govern long-term (distal) or immediate (tactical) results. The first process is one of critical thinking. Critical thinking has many functions, but is best described as a process of learning (Rand, Rand, & Rand, 2011). The process starts with listing what is known followed by analyzing the relationships of what is known relative to the end goals (see Covey, 1991). In this stand point, we use critical thinking to understand GAPS in knowledge by identifying the space between what is known versus the goal for desired knowing (Rand & Rand, 2010).

Critical thinking, in context of *individual-contribution*, should occur at the onset of any development effort. All too often people will reactively respond and jump immediately into implementation. Critical thinking allows the opportunity to expand the space between the stimulus and response.

For example, if your base-ball coach states we need more home-runs. The best first thing is NOT to have all 20 players on the team start practicing how to hit the long-ball, but to look at the team score card.

Does your team have a score card?

A *score-card* is just as it sounds - no different than a baseball card we had as children. The pretty picture shows the external personal INDIVIDUAL-Contributor for which we see on a day to day basis: it's who comes to mind. The back side of the card provides the stats on the individual.

Disciplina-focused learning is the art of creating a cadence of accountability. This is often defined as the focused execution of wildly important; thoughtful; profound goals. Do you define your five-day a week roles and goals in that manner? You should! Research supports that great leaders, contributors, and organizations focus in this manner.

Discipline 1: Focus on the Wildly Important

Wildly Important Goals (WIGs) are the vital few goals that *must* be achieved to fulfill the purpose, or nothing else you achieve really matters much.

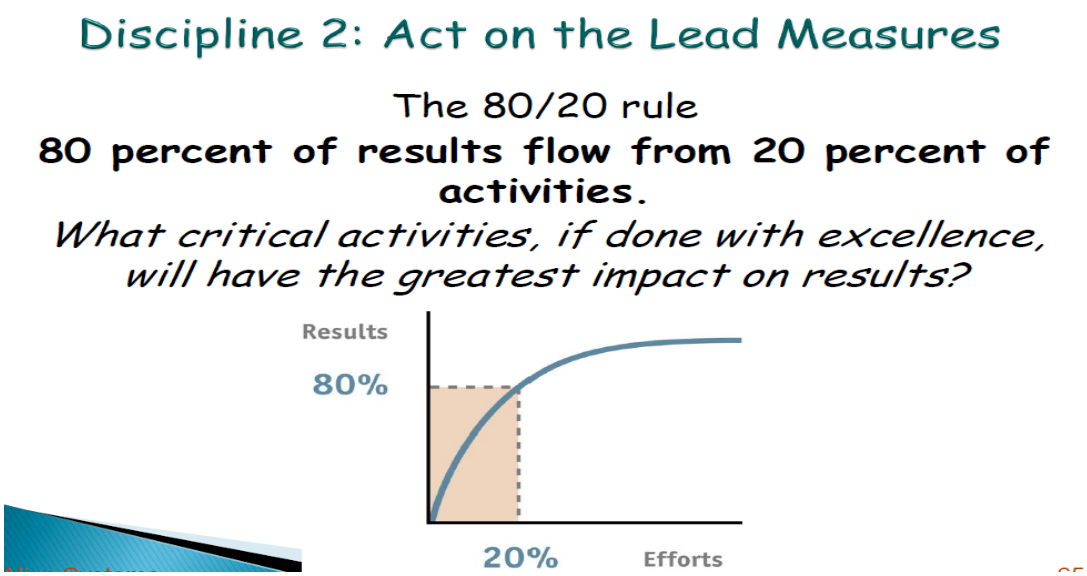
Pretty Important Goals (PIGs) are goals that represent the many good things you can do.

Does your company count the important stats?

Critical analysis can help us establish what should be counted because it provides important and useful data toward the end-goal (more home-runs). Assume for now, the team's score card is well in place. They might determine that they only have one player whose stats support the talent to hit a long-ball. This is where strategic thinking re-enters; and critical planning moves toward implementation.

First, because the base-ball team needs to win, the strategy must be reviewed. Hitting long-balls (home runs to the non-baseball fan) might be a strategy best achieved over-time; therefore, the team will need to shift the tactics toward moving players from base to base by hitting shorter hits and putting players on the bases first thing, first.

As the team engages this process, they can track better data. Is there unrecognized talent? Can a player be taught to hit the long-ball? Where does the team have an over-load of talent? How can those players be shifted to meet short-term needs? The score card keeps a team focused on the profound goals while so that focused lead-time can be properly measured, analyzed, and inform purposefully learned strategic shifts of direction.



This is how process thinking is both strategic and critical. On the one hand the team must win games now. In doing so, they can fill GAPS from their initial ASSESSMENT and continue to redesign the strategy based on key benchmark findings (*bench-marking* is establishing the base-line performance at the start... not mid intervention!). In this manner, the Critical Thinking Process defined in section two of this book continually inter-connects the strategies and goals.

Strategic Thinking requires a determined process for how/what is sought. Strategies are the chosen methods to reaching the mission and purpose. These are defined based on several key steps (see Section Two) that include share/stake holder satisfaction, values, strengths, and opportunities. Data that comes from critical analysis can help provide indications for a need to alter the future strategic vision, or simply modify the GOALS for ensuring the vision is obtained. Strategy by nature should be long-term, or distal (Carruthers & Hood, 2007; See also Rand & Rand, 2010). But, it can provide an over-arching concept for short-term endeavors.

For example, non-profits paint a great picture for how strategy is both long-range and real-time. While the long-range strategy of an organization might be success developed through personal relationships developed through outreach... the short-term strategy might require developing profitable relationships to fuel contributions supporting the cultivation of long-term success for said outreach programs. In other words, the strategy remains the same - a path of engagement based on delivery of services (outreach) and relationships. But, in the short-term the "ideal" may have to be conducted in a manner that requires much more concrete specific profitable miles-stones than a long-range strategy.

All too often non-profits, as the example, will focus too munch on grass-roots. The heart and spirit of supporters; but then as they become stabilized, the urgency dies and the non-profit fails to grow. On the other hand, start-up non-profits will also fall victim to too much planning and reliance on ONE source of long-term revenue (such as a single contributor, or a specific grant request) and fail to engage a team to build the breadth of their support. The solution: balancing the experience (heart & spirit of volunteers) with performance (articulating and obtaining procedural grants) with a clear and compelling score-card!

Discipline 3: Keep a Compelling Scoreboard

A great scoreboard is:

- **Visible.** It is located where everyone can see it.
- **Visual.** Displays lead and lag measures place.
- **Engaging.** Attracts and holds attention.
- **Doable.** easy to administer.
- **Concise.** contains specifics such as “from what,” “to what,” and “by when.”

In this example, one can see how some situations require BOTH critical thinking AND strategic thinking. Situations may be primarily strategic, or primarily critical, but most life and business occurrences have elements of both. For this reason, recognizing situations for their true nature (critical or strategic is very important).

Consider organizational Development in the following manner: An organization is a circle, the size 6 inches. Within that circle are 100 teams; these teams are made of up 3 people. These three people fill the entire team circle and all 100 teams fill the entire organizational circle. In this manner, organizations - like individuals - are complex systems.

Each individual has the opportunity to be developed and cultivated. As each member of a team is cultivated, their teams have the chance to develop more cohesive interaction. As these teams gain more inter-dependence (see prior section) the organization as a whole can move through the process of development toward effectiveness.

This culminates in a shared and inspired vision built on purpose with profoundly important goals. The *disciplina* of learning ensures adequate 5-day focus on what is most wildly important; the clear score card counts, measures, and provides clear visual progress; but the cadence of accountability is the process to ensure the continued *disciplina* with each individual part of the whole, while maintaining the shared, inspired, and interdependent vision.

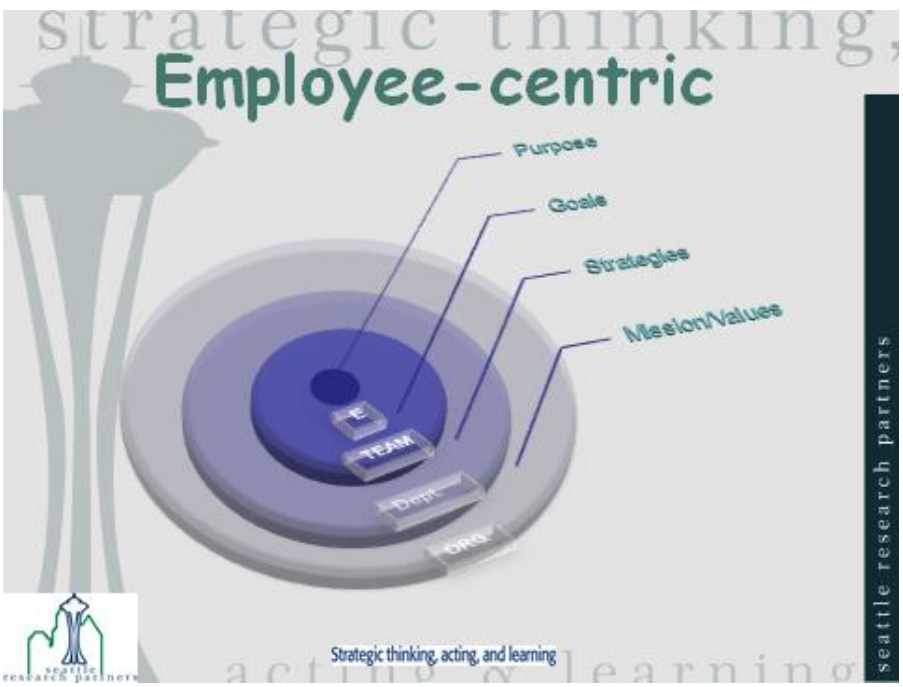
Discipline 4: Create a Cadence of Accountability

Great teams create a cadence of accountability and engagement around their WIGs.

The individual development process is the same. The individual is the circle, and within the circle there are 4 domains - think of a globe that has an air, molten lava, crust/mantle, and water. These domains represent: mind, body, spirit, and heart. In all ways they are separate; yet all are required to function together to have life within the globe. As such, these domains are influenced by short-term effects - elements.

Well-Being is defined in this manner. To develop skills and capabilities in one element, will cause impacts on others. Likewise, to influence domains it may take a long-range development plan for an individual - the constant reliance on both strategic thinking AND critical thinking. Ultimately, to choose to focus on only one element, within one domain, is to take a very finite approach to well-being. This is often a result of reactive thinking - when we allow life's circumstances to bring all attention on one negative situation; opposed to leveraging our strengths and opportunities in various domains and elements to help shore up a weakness.

Keep the image of a globe in mind… The domains are best represented in context of *4 Roles of Leader*. These domains are known as Modeling, Path-finding, Alignment, and Empowerment (Covey, 2004). These roles take into consideration that a company has domains made up of individual contributors within the functioning organizational system. These roles, however, are best modeled within relationship to the specific internal systems and processes (domains and elements) that influence the company.



Model: a leader models the way by engaging other individuals in assisting them with their self-development as employees through a coaching experience. This process is one that involves five steps. A leader must model, inspire, challenge, empower, and celebrate individuals one-on-one and within a team context (Covey, 2004; Kouzes & Posner, 2005). This process, like elements, must be measured and applied repeatedly and on a tactical (critical) basis.

However, in order to model, a leader must demonstrate their ability to engage in self-development. This is important to differentiate between being perfect in all areas: modeling is not perfection, it is open-willingness, and intense passion, attunement, consistency, and buoyancy to change (see Collins, 2012; Pink, 2010; Pink 2013). In other words, to model as a leader is to be aware of your own best contributions, your own appearances (oceans, lakes, land, continents, etc.) vs. the shadow cast by your weaknesses. Development by nature is continuous and evolving; therefore, never perfect and molded forever.

Clarify: the process of clarity is one of helping to link people, teams, and strategy within an organization (see SRP, 2011). This process requires an individual leader help clarify purpose from those tasked with keeping a keen eye on the long-range results versus those tasked with ensuring the wheel functions smoothly right here, right now (see *Habit Three*; Covey, 1991). Unfortunately, this is often where companies struggle the most. It is also the first step and role of a leader to ensure clarity and buoyancy within changing long-term and short-term situations. The culmination of great path-finding is the

Align: the concept of alignment is rooted in the systematic process of assessing individuals and teams. The purpose is to avoid what is known as the Prato effect (Rand, 2007; see also Covey 1991; Collins, 2005). This is the concept that 20% of the employees produce 80% of the output! Research tells us that this occurrence is alive and well despite economic cutbacks and forced increase effort (see Taylor, 2010). Therefore, structural support can be considered the process for ensuring that the various individual "globes" within the organizational "sphere" are working properly in relationship to their mutually related objectives. This is the first step toward being a good company.

The second step is conducting further critical assessment and hiring the right person (globe) to meet the company's needs (see Collins, 2005). For example, imagine that after a strategy has been clarified, a team leader has created the inner-core, the air, the ozone, but is lacking the right continents with certain features; how do they fix this gap? They go to market to find human capital to provide those needs. The challenge, however, is often focused on the external role of what is needed versus ***who*** is needed. In other words, hiring professional and senior managers will start first by designing the role and implementing (hiring), but not exploring the purpose, vision, and values needed to succeed in creating what the "globe" lacks holistically.

Assessments are a great tool often deployed incorrectly to help achieve consistent clarity. Assessments are valuable in many regards as one tool for fitting the right person onto the team; more importantly individuals who choose to think, act, and learn as a leader use tools to support their performance (Rand &

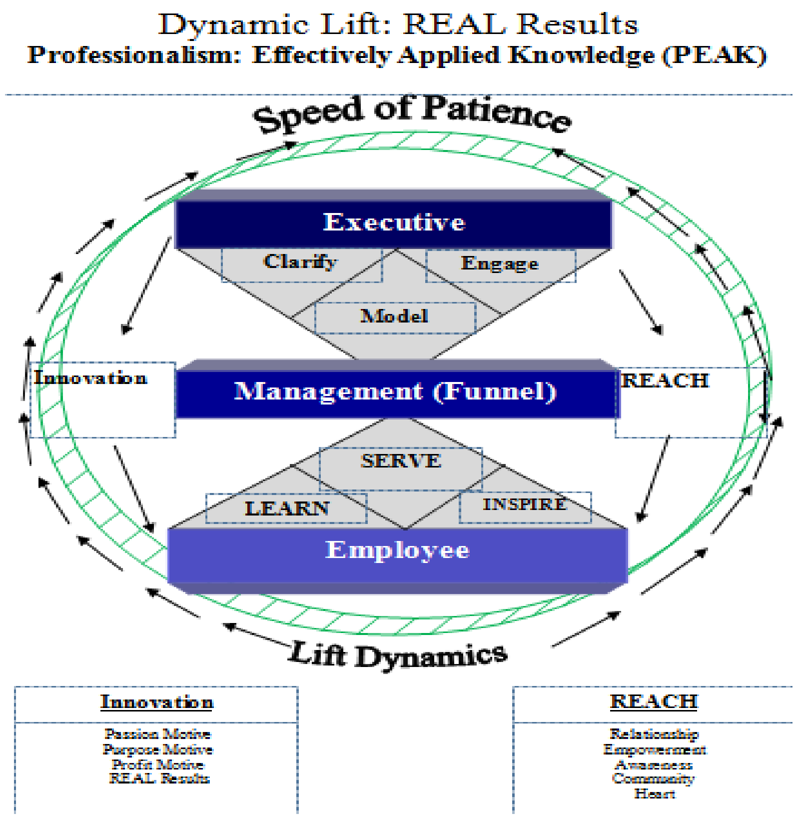
Associates, 2013; Rand & SRP, 2013; see also Collins, 2005). For example, the Myers-Briggs is the old-hand of assessments. However, this assessment only measures the presence of very specific *elements* of well-being in relationship to the shadows cast outwardly by the globe being measured (see prior notes; globe = person). The tool is very good, therefore, for a team leader in context of clarity, problem-solving, and building team relationships by overcoming perceived short-term behaviors. However, because it measures the elements of external influences, the findings frequently change and last for a very short-time when we consider the role of well-being throughout an individual's lifespan (think of a passing shooting star, it might hit the ozone creating sudden awareness to an external situation, but does little beyond catching the attention of a few attuned people).

Other exams, such as the Big-Five seeks to measure more consistent internal elements of personality. As such, it becomes very reliable when engaging individuals and teams for critical task accomplishment, but does not provide information as to determine if the person is on the right seat on the bus. This results from the fact that there is no substantive proof that the Big-Five (McCrea & Costa, 1987) can be applied to align an in-organic role with an organic team-member to fill the role (Rand, 2010). Therefore, consider this assessment to be the typical weather-pattern an individual can be seen (from the exterior) with little understanding about the driving internal forces that inspire and influence that person.

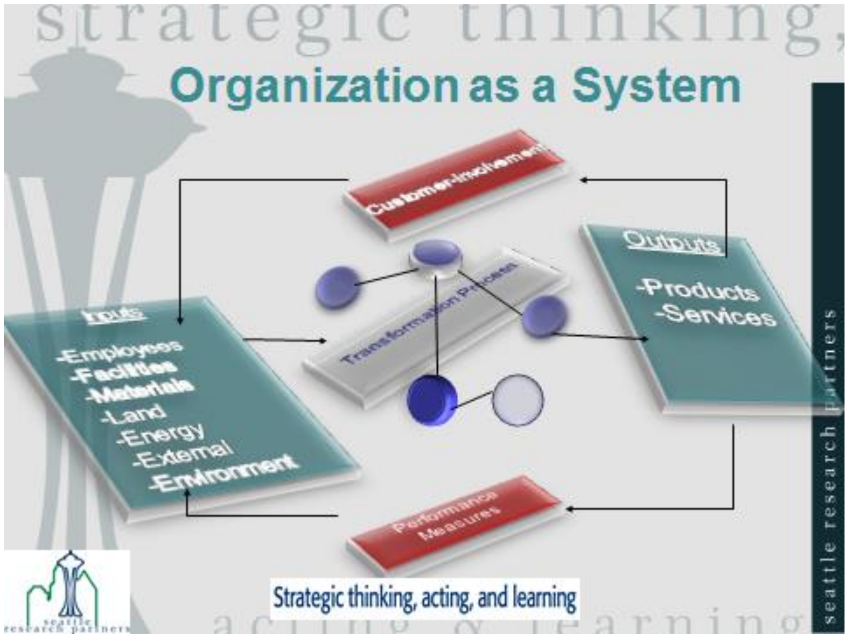
Consequently, in spite of tools available for measurement, a leader must choose how to help individuals understand what any hundreds of measurements mean within context of all domains and elements (internal and external) of the individual. In this manner, the leader can better engage that individual through coaching to apply process thinking for the purpose of capitalizing on opportunities by leveraging strengths and helping to diminish the negative shadow cast from threats. For this reason, the Core Values Index (CVI) appears to be the only available tool that helps an external coach effectively teach a person how to gain more from life based on their internal mission, vision, and values with a three year reliability (accuracy) of 94% (Rand, McKay, & SRP, 2014; see also SRI, 1999).

Engagement (REACH): the simplest but often most challenging role of a leader is to create a culture of true engagement. This begins with the five steps of modeling and builds overtime. However, it is more quickly created with the context of the speed of trust (Covey, 2008). Trust is the key to empowering employees.

While modeling is the center core of team-development: it is both long-term and critical process that is built on trust which is earned through continual application.



Clarity, structural-support, and engagement consistent processes that support the development of the team are best defined by the acronym REACH. REACH stands for relationship, empowerment, awareness, community & heart. Because these processes ensure each individual-contributor may achieve their maximum Professionalism: Effectively Applied Knowledge (PEAK) potential through learning potential; the process of engagement is best understood through key process-models. It is important that these process models are iterative in nature, they do not occur in a linear manner.



Summary

Organizational Development as a business system summary

The key to organizational development is to focus on the long-term and short-term company needs. To do so confidently requires: *attunement, buoyancy, and consistency* (Pink; 2013). Effectiveness, therefore, is a consistent process within every system to ensure the proper holistic relationships are working together. Organizational development, therefore, is a process for company, team, and individual improvement and awareness. It is a process that must be deployed in long-term and short-term situations with regards to both internal and external forces influencing the entire system.

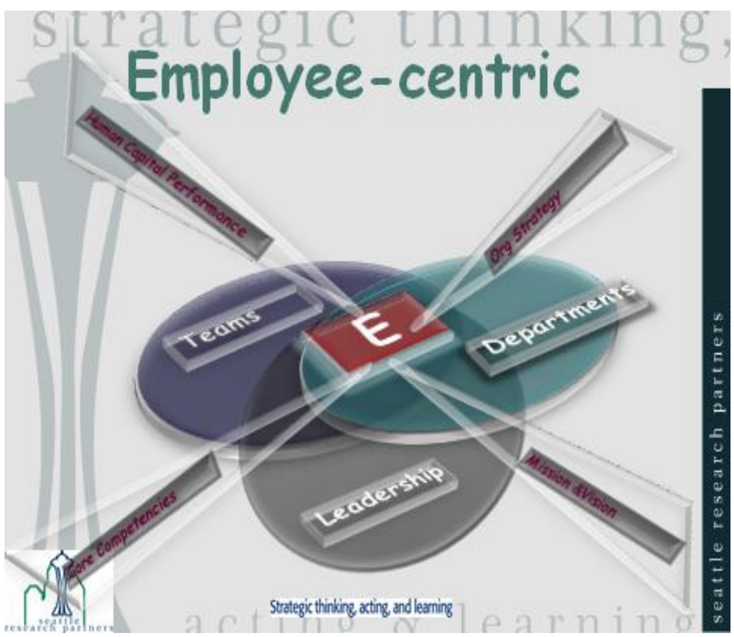
Return to the concepts of the Strategic Learning & Leadership Guide presented earlier.

Take a moment to contemplate the various systems that you see in your work-place. Brainstorm by using a mind-map to examine the tasks, roles, and processed, procedures, systems, in all domains and elements within a company. Then deploy the relationship-diagramming to create consistent systems that encompass roles and tasks (these processes are defined step-by-step and templates follow this section to help ensure your Professionalism: Effectively Applied Knowledge (PEAK) ™). By doing this you should evaluate the well-being development FRAMEWORK (not *plan*, that is design and not exploration or discover). This framework should simultaneously improve the SWOT of a company as well as the SWOT of an individual in the many complex, ambiguous, but inter-related components that must be taken into consideration before a specific *plan* can be designed.

The simple clarity for organizational development, and individual development, is to remember that the role of the leader is to help the individual understand, analyze, and evaluate internal and external influences on both short-term and long-term behaviors, needs, elements, and domains of well-being by compassionately coaching the individual (or team) toward desired achievements by using tools to ensure benchmarked achievement occurs. Hundreds of papers have been written and researched on very minute components of these systems; but, this section highlights the key components (see Rand, 2010; Rand, 2012).

Therefore, remember the role of the coach, leader, negotiator, human resource professional, operations manager, spouse, or even friend is to help an others find simple clarity in pursuit of their passion. In order for that person to recognize their passion and purposefully pursue their passion, leaders foster learning by using regular, consistent, buoyant, and attuned processes and tools (Rand & Mashuta, 2013; Rand & SRP, 2013). Great leaders avoid reacting quickly and without assessing, planning, and crafting creative solutions to short-term "shooting stars" that might distract them from their best and highest contribution to themselves and others they interact with in life.

A leader is cultivates Employee/individual-centric systems



END READING SECTION

Application: Complete these activities as defined in the next 2 pages

Leadership: **After surveying the article** **LIST Key Concepts and/or Terms Covered in this module(s) based on your SKIMMING**

Ask probing/thought provoking questions about this module. Write them down. Your questions should ask what, why, how, when, who and/or where as they relate to the content. Turning the titles, headings and subheadings into questions is an effective method.

Questions help you pay attention, understand the materials and recall the information later when you read it. Write three to five questions.
Q1
Q2
Q3
Q4
Q5

Begin reading the module starting on page 40 for content and context. Remember to use the tools that were explained in Section 2.

- Ask guiding questions while you read (pg. 46)
- Use the ***technique of Reverse Outlining*** and use the margins of your book to do so (see prior section for the process)
- Look for key words and phrases – highlight only those – (see pg. 48)
- Note questions/concerns/light bulb thoughts in the margins as you READ
- ***Resist the urge to write copious notes!***

When finished reading, transfer your reverse outline from the margins in Module on pages 40-60 here.

Sample outline Structure	**Your Outline**
1.Main Topic/Concept a) Supportive information 1) 2) b) Supportive information c) Supportive information 2. Topic/Concept	

Review Key learning Objectives

After reading and completing your module(s), use all course lectures, presentations, and power-points, review these key themes:

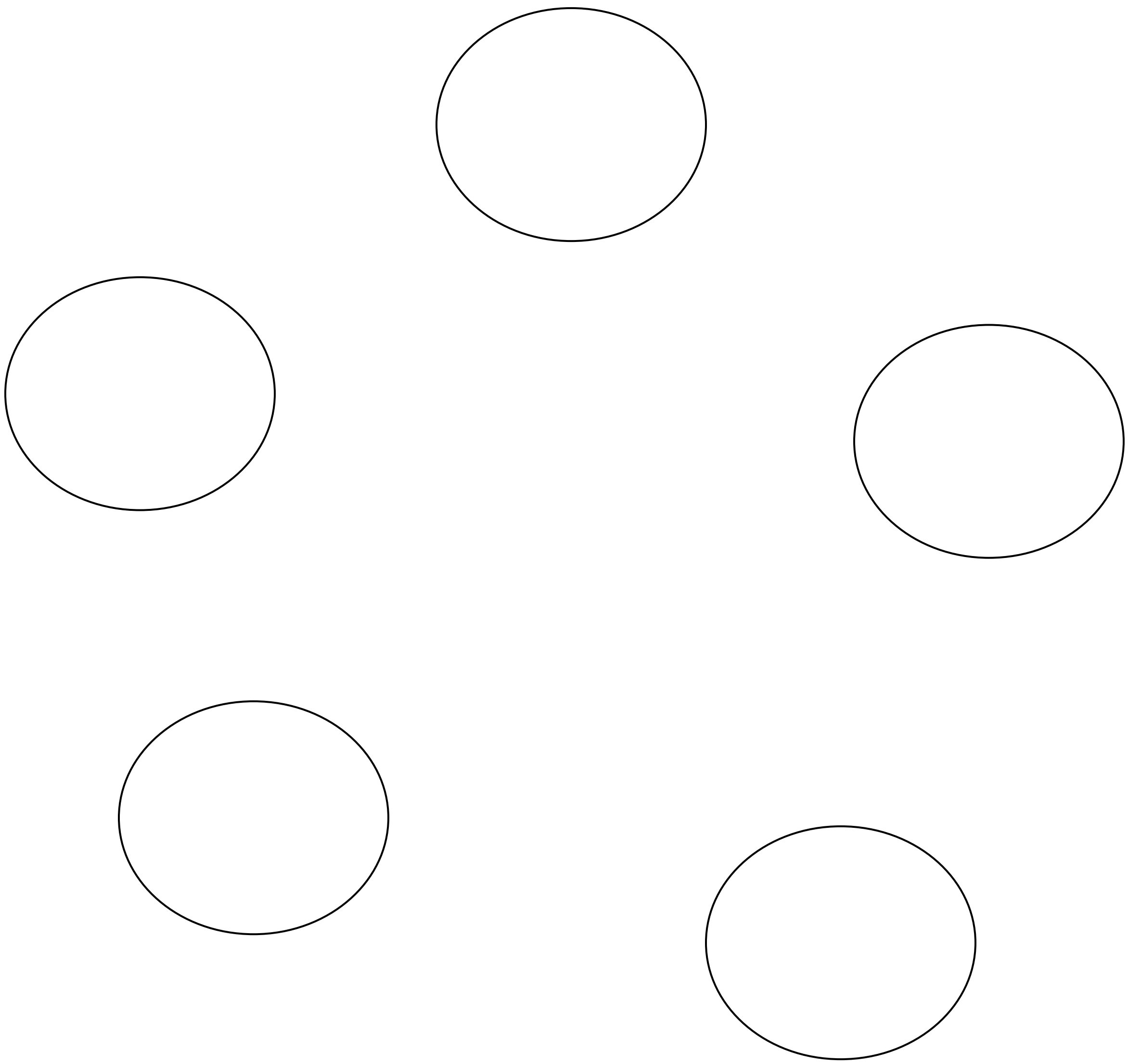
What I Know About:	List (use bullet points, not long narrative)
Applied Topic	
Personal Leadership	
Process Thinking (Critical and Strategic)	
Team Leadership	
Well-Being	

Note: the space is INTENTIONALLY limited; keep it simple; keep it concise!

Use concept mapping to understand, develop, and creatively learn about the key points you identified in the module(s).

Concept/Mind Map for Module Exercise

Create an interrelation diagram to deepen your understanding of these concepts and hone in on the relationship between them. You learned this process of learning by reading this booklet. Video Tutorial Here.

Interrelation Diagram for Module 1: Write key themes/concepts in each circle


The goal of this exercise is to formalize a general conceptual understanding of the learning objectives (holistic learning) in a very concise description by blending key themes, concepts, terms, and experiences into a statement that opens your mind to understanding how this module will relate to future learning sections.

Remember that this is a creative and subjective process with no right or wrong answer. Completing these steps will help you list key points, analyze, and evaluate the learning experience. This is built on the learning theory presented earlier. Skipping steps is the only error in process execution: creativity and application has no right or wrong answers.

	Write your paragraphs here
Identify and summarize the key concepts/themes contained in this Module in three to five well formulated paragraphs. (paragraph one)	
Identify and summarize 3-5 key things you felt you learned by	

studying this module in a well formed paragraph of 4-6 sentences. (paragraphs 2-4)	
Discuss the learning process you followed: what worked well; what didn't work well; discuss your adherence to your study plan/schedule in a	

paragraph of 4-6 sentences (paragraph 4 or 5)	

Section Four:

Applied

Strategic Thinking, Acting, & Learning

This document is also found in the Strategic Learning Alliance membership site and is intended to be the syllabus for understanding, discovering, and designing application of thinking, acting, and learning tools.

The Strategic Learning Alliance (SLA) is a membership of dedicated professionals committed to the advancement of applied-learning through development of competencies that maximize performance through effective application of knowledge. Put simply: SLA members believe leadership is a choice to be life-long learners. You have been provided this document as a new member of the learning alliance.

Because our membership value learning, you are requested to complete a self-customized learning experience and submit reflective statements(s) to the SLA.

How come?

- To benefit research and development of the selected assessments & learning tools;
- To provide direction for how the selected tools might benefit the Coaching industry, Human Resource Industry, individual and team leadership experiences;
- To ensure our alliance supports and endorse only effective, valuable, and useful tools for CEUs credits.

Earn 8 Continued Education Units
(CEUs are SLA, SHRM, & HRCI approved)

To complete this process you will spend 8 hours understanding and engaging the SLA membership site, tools, and resources. The experience includes:

- Learning about the assessment tools;
- Applying your learning;
- Evaluating how you will share the tools at no cost in your role – as a coach, negotiator, HR professional, or to expand your networking reach.
- Compiling your notes in this packet and submitting the completed packet where directed at the end of this document

How long will this experience take?

2 -4 hours maximum to complete the learning and required documents (not including time spent sharing and engaging with professionals who you interact with while applying the tools and resources of the SLA) in this packet to earn 8 CEUs. You may however spend as much time learning and applying the tools to enhance your career as a certified professional coach. However, each member is expected to contribute 8 hours to understanding the SLA programs, tools, benefits, applications, and opportunities to earn their first 8 CEU hours.

Virtually every SLA endorsed program or event provides 2-60 CEUs including SLA, SHRM, and HRCI hours. Full offerings on programs are available under www.strategiclearningalliance.org registration sites.

Process:

Learning causes individuals to alter their behavior in a relatively permanent manner; however, learning is a life-long commitment and a choice (Rand, Rand, & Rand, 2011; Rand & Associates, 2013). Strategic Learning Alliance membership is open to anyone who chooses life-long learning, even if they do not hold applied-competency based certification in HR (HRA), negotiations (CPN), coaching (CPC) or leadership (CPL).

If you have not already done so, take the time to learn about the benefits of being respected as a CPC, HRA, CPN, or CPL here.

SLA members are not required to master the content SLA tools to receive 8 CEUs. Instead, this guide helps you apply a proven learning process using the strategic method of learning. Once you have completed this guide you will have come to understand SLA tools, programs, and resources; you will have discovered aspects of yourself as a learner and a professional; and designed a plan to sharing the tools, resources, and benefits with your co-workers, clients, business networks and others after completing the learning experience.

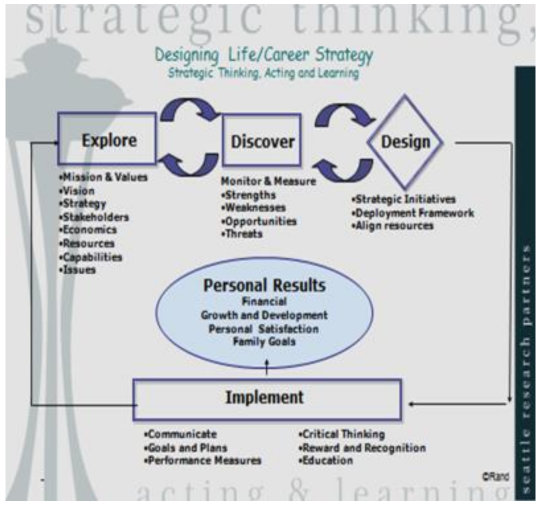
In the event you have been provided complimentary access to the SLA by an affiliate partner, you will have 6 to 12 months complimentary access to the certified membership benefits. During that time, you have the following options:

- **Certification**: by earning an SLA certification, you receive complimentary membership status for 24 months from the date of your program (certification course) starting.
- **Membership**: all individuals' gifted access to the SLA membership site will be notified by email 90 days prior to expiration of their access; email reminders will include instructions to cancel membership. Those with trial membership will have full 24 month access continued and issued an invoice for 24 months of access. Trial membership must be canceled 90 days before invoicing to prevent membership from being non-refundable.
- **Associate Membership**: associate members may use the limited program access for $95 every two years.

What is Applied Learning?

Professionalism: Effectively Applied Knowledge (PEAK)™has been independently researched, tested, and vetted for over a decade by nationally awarded research firm, Seattle Research Partners, Inc. In testing the effectiveness of the application of knowledge (PEAK), Seattle Research Partners, Inc. and Strategic Learning Alliance, have created various video blogs, reports, and other data about the role of learning.

At its core, Professionalism: Effectively Applied Knowledge (PEAK)™ is a customized process that links individuals, teams, and strategy through application of coaching, negotiations, HR, and project management fundamentals. This is built around a three part learning process which is customized by individual, group, or team desired learning objectives (see Rand, 2014).



There are a variety of implications for Professionalism: Effectively Applied Knowledge (PEAK)™and the role of an applied learning professional that are not only directly impacting corporate America, but also are directly influencing the direction of the knowledge era in work, social, and other domains.

For example, the Society of Human Resource Management has recently validated and shifted their entire certification of management-level HR professionals to a competency-based model. The same is true for the Canadian Certification of HR Professional designation, too.

Strategic Learning Alliance is the longest standing applied learning & competency based accrediting entity in the world. For specifics visit www.strategiclearnignalliance.org about how you can become an accredited learning provider, a corporate accredited learning institution, or just simply earn applied-learning (competency) certification in coaching, negotiations, or other areas!

KEEP IT SIMPLE: Read, Understand, and then Apply

1) **Step One: Explore SLA membership tools:**
    a. ACCESS is built into this packet to ensure you read the steps before accessing the site.
    b. Spend no more than 15 minutes, BUT NO LESS than 5 minutes reading each page of the membership site (in-full) to understand what tools and resources are available.
    c. Avoid the urge to click and start any tool, assessment, or resource until you understand what all is included.

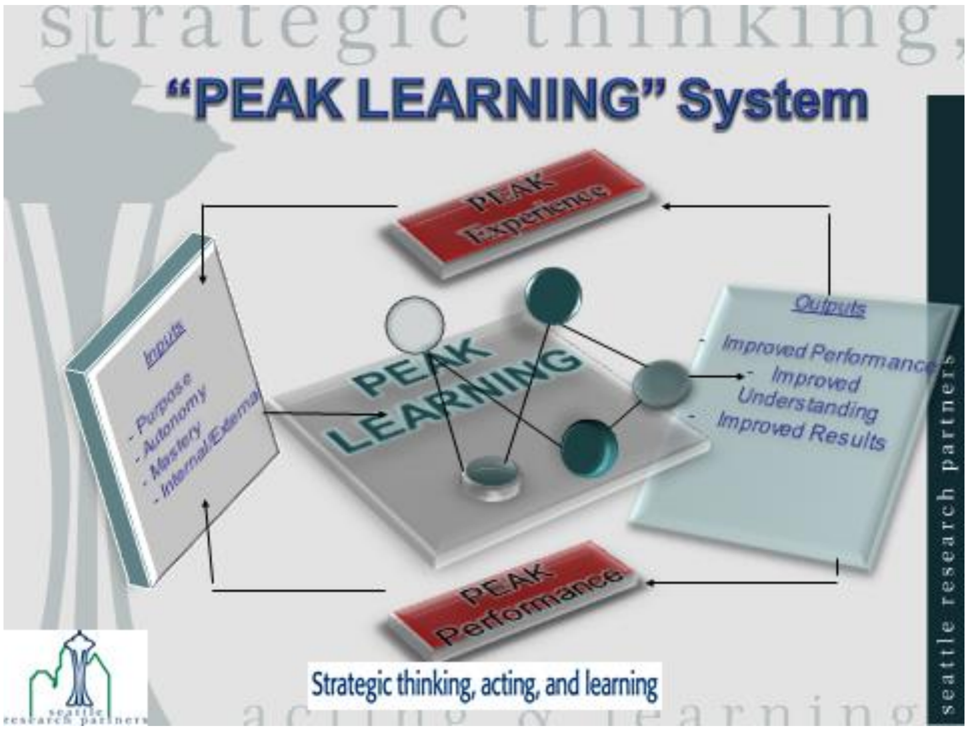
2) **Step Two: Discover Benefits/Applications**
    a. Follow the steps in this packet; read overviews provided in this document; test each tool/resource; finally, before moving to the next resource in the membership site complete the SLA reflective statement.
    b. The membership site is updated quarterly so tools may come and go, you are encouraged to set a reminder to review the SLA site once a quarter to access any new tools, resources, or benefits provided to you at no cost as a 2 year member (or 1 year guest member) of the SLA.
    c. Apply the Learning Process to engaging the assessments as directed in the learning experience BY FOLLOWING the 1, 2, 3 step learning experience to master the content in an efficient manner:
        i. It is suggested you first test the tool for yourself;
        ii. Capture learning notes in this document while you learn about these assessments in this packet to be eligible for CEUs.
        iii. Further share the assessments with others as you explore, discover, and design ways to use the tools to enhance your client, employee, co-worker performance, learning, and engagement.

3) **Step Three: Design a Plan to Implement and use the SLA tools**
    a. Complete the SLA Welcome Page process steps & reflections as directed while completing a self-guided learning experience for each tool;
    b. Complete and submit this packet where directed at the conclusion of this packet to receive your SLA/SHRM/HRCI credits.

4) **Steps Four & Five: Implement (ENGAGE & SHARE!)**
    a. After testing the tools and reflecting on experiences in this guide, complete the reflective statements for each SLA tool (see membership sites).
    b. Engage others by SHARING each assessment, resource, and tool (AS DIRECTED for each tool in the membership site – READ INSTRUCTIONS FIRST!) with 3 to 15 co-workers, family, friends, clients, prospective clients, or business associates.

NOTE: the completion of this document is required to receive SHRM and/or HRCI CEUs.

Step One:



Planning to Learn

Complete the steps for learning about the Core Values Index (CVI) and/or the Career Development System as directed in membership welcome page. Use the templates in this packet to take purposeful notes.

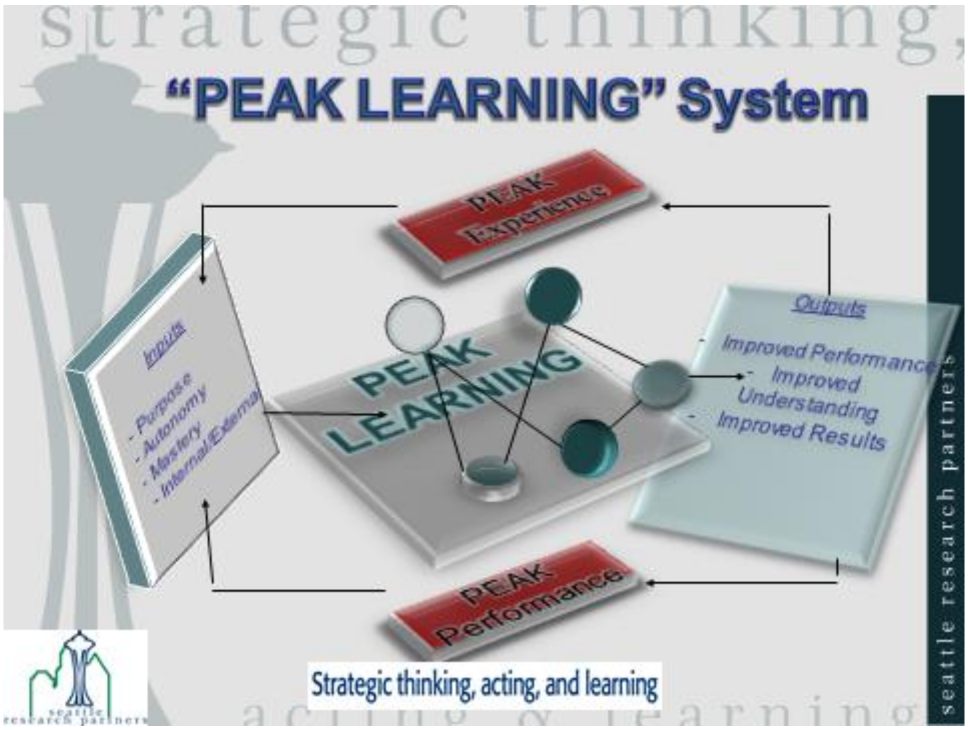
Step 1.1 - You are about to learn. Before you do, write out probing/thought provoking questions. Your questions should ask what, why, how, when, who and/or where as they relate to the content you are about to engage.

Asking general, simple questions provides a framework for you to apply learning new content (Rand, Rand, & Rand, 2011).

Questions help you pay attention, understand the materials and recall the information later. Write three to five questions.
Q1
Q2
Q3
Q4
Q5

<u>The objective is for you to answer these questions at the end of engaging your assessment tools.</u>

Step Two:



Discover and Understand the Tools

The goal of this step is to learn about, apply, and report on your experience applying tools, resources, and programs available to SLA Members. **Please complete the following process before implementing any actions:**

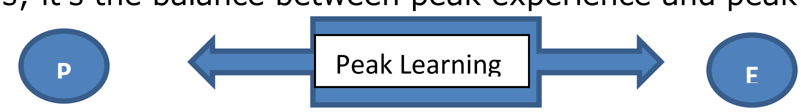
- Read Step Two in this packet **LINE-BY-LINE**, complete the actions below before continuing to step 3.
- Access your membership site at: **URL provided momentarily**
- Survey the Membership site by:
    - Spending 5 to 15 (MAX) minutes skim reading the introduction;
    - Locating the lessons and understanding the acronyms and what is provided in each of the 1, 2, 3 learning experiences;
    - Recognizing what information, resources, tools or instructions defined in this section but housed within the membership site.
- Using the workbook, bullet point your understanding while also surveying the membership access provided below.
- Advance to Step Three.

Tool 1: Strategic Learning Alliance Membership Site

The SLA membership site is continually revised and crafted to act as a tool for learning. Time, care, and concern have been invested by volunteer applied-learning members, scholars, and practitioners to ensure that you "walk" through the natural progression of learning while using the SLA membership as a tool.

This is known as the 1, 2, 3 method to apply Professionalism: Effectively Applied Knowledge (PEAK)™through experience and performance learning basics: understand, analyze, and effectively-create.

What is learning? Learning is a relatively permanent state of change (SLA & Rand, 2013). Applied learning, is the maximization of performance output through effective application of knowledge; otherwise known as peak Learning. Peak Learning has recently been recognized as a *pre-existing* condition that empowers life motivations; it's the balance between peak experience and peak performance



Originally defined as *peak experience* and *peak performance,* Maslow (1954) identified the necessity of balancing these optimal states of existence in order to capitalize on motivational drive. Research over the past twenty years, but more especially in the past decade, have revealed that the balance of performance and experience results in optimal achievement of well-being when learning is introduced as a balance between performance desires and lived experiences (Rand, 2014; Rand & Associates, 2013; Rand & SLA 2011; Rand, Rand, & Rand, 2011; see also Carruthers & Hood, 2007; Hood & Carruthers, 2007; Senge, 1995).

Applied learning, therefore, is best understood as a process fostering understanding, analysis, evaluation, and creation through customized application selected by each individual learner!

Strategic Learning Alliance has created resources and membership benefits that ensure the following consistent experience is achieved by blending learning through the performance engagement of using tools, skill development, and application:

- Promotion of well-being through peak experience & peak performance
- Promotion of self-awareness through customized application
- Promotion of applied skills in negotiations, coaching, and human engagement through deployment of tools to ensure consistency
- Promotion of learning through short, powerful, fact-based electronic blogs to empower sharing of information, not gossip.
- Continuation of learning, page by page.
- Recognition of TOP-Performers through certification (organizational-based models)
- Choice-based performance to earn certification (end-user model)

Tool 2: Core Values Index & Handbook

The core values index is a strategic assessment. It provides you with a 98% reliable test that when taken once is accurate for at least three years (and as long as seven based on independent research). The program includes a 175 page book and a 30-minute webinar. This will help you understand how to best intuitively use this tool (please note that this does not certify you to administer the CVI, but will teach you how to intuitively use the tool for coaching clients).

This tool is ideal for:

- ***Coaching***: understand the innate and unchanging energy of your clients

- ***Human Resource Professionals:*** finding the right talent for the right role on the team, or 'bus' (Collins, 2005). By aligning core values of an individual, attract and retain top performing talent. Not only is the CVI an assessment of an individual, but also can be aligned to team-profiles based on established top-performance. As a result, for those of you coaching business professionals, they may benefit by knowing how to hire the RIGHT person based on the Good-To-Great theory of excellence by using the CVI (see Collins, 2005; see also Rand & Associates, 2013).

- ***Family Development***: the simple language provides great commonality to helping families overcome behaviors that challenge achievement of great family well-being.

- ***Interpersonal Dynamics***: for the same reason above, this tool is valuable.

Tool 3: Improved Employee & Team-Builder System

This tool is designed to provide coaches and participants with several key reports. First, each participant will receive a two-page soft-skill report. The inability for people to articulate their strength-based soft-skills is the primary challenge faced by companies wanting to hire or promote (SJI, 2013; Rand & SRP, 2013). Furthermore, this tool is 94% accurate in capturing strength-based soft-skills (Rand, 2013). It is ideal for:

- ***New coaches***: in addition to the two page report, you have access to 24 pages depicting how to best coach, train or manage individuals based on their strengths.

- ***Recruitment, Hiring (interviewing), and HR***: align an individual's natural soft-skills to produce better employees, groups, teams, and organizations. Keep strength based behavior at the forefront term by term by using reports geared to help the individual become more aware of their natural strengths, while providing HR, coaches, interviewers, and team leaders full scale (24 pages) to "cheat-sheet" (1 page) summary reports.

- ***Team coaches***: provides a team summary (1 page profile)

- ***Career Development Coaching***: by using the interview reports, you can help a client learn to recognize and articulate what makes them unique and effective as an employee. This is shown to improve hiring odds by practicing-interviewing 4:1!

- ***Personal Behavior Awareness***: by sharing the full (24 pages of reports) you may better help a client recognize what is impacting their best performance in life and in work. A great tool for new coaches!

Drawing on this tool, SLA members can also test and establish small group and team cultures, behavior, and create 94% accurate group reports (Rand & SLA, 2013). The team-builder and improved-employee program is supported by an independent research report and self-directed applied learning experience based on career development. Long story short, this tool provides coaches, HR, negotiators, and leaders a systematic and accurate report for empowering effectiveness from individuals, groups, teams, departments, and even organizations.

Tool 4: Strategic Learning Alliance Learning Blogs (Library &Videos)

Within the information era, professionals are continually bombarded with information. Social media, news outlets, and SMART phones result in an abundance of information bombarding people every second of the day. Sound familiar?

With the advent of social media, the future has become muddied with online media making unfounded, non-fact based claims that result in antidotal and individual opinion or experience. But who has time to read a 50 page research paper? The SLA volunteer blog communities provide topic and content facts, tips, and findings to ensure your speedy ability to listen, view, learn, and make use of findings.

Use the tool, understand applied learning and research findings with silent video briefs, to 1 minute fact-Tips, to '5 Minute White papers' and full length guest presentations.

What is more? You can share the SLA video blog through social media with your clients, network, co-workers and more to help inspire commonality and understanding of performance improvement through fact-based, applied learning skills, tools, and resources.

For instructions on sharing the SLA blog-site at NO COST, see the instructions for Associate Membership Gift in the SLA membership site!

Tool 4: Career Development System Overview

Career Development System is a program that has been independently researched and vetted based on the success rate of participants finding jobs. Furthermore, the CDS is equally powerful for organizations interested in implementing modern "Employee Centered" organizational theory to inspire, empower, and motivate choice-based leaders (see Rand & SLA, 2013; SRP, 2014; SRP & SLA, 2014; Rand, Gujariti, Lafferty, & Pannell, 2014) based on Drive Theory (Pink, 2010).

In this report, readers come to understand the role of the modern employee-centered organization, the modern employee, the modern resume, and the modern expectations for applied learning in the workplace. Focusing on populations including unemployed, veterans, small business, major enterprise organizations, coaches, and HR professionals, Dr. Rand, author, scholar, and lead researcher, demystifies the fundamental building blocks to immediate professional, group, and team achievement by leveraging the CDS system.

Don't believe us? Share the tool with clients (self-directed experience); see the results of just the report and technical instruction manual.

Tool 5: Strategic Learning Alliance Certification Details

The importance of certifications is well attended to in the career development report, but certification takes on different importance depending on your perspective. The SLA site provides access so that each member can refer to policies, content, expectations, and benefits for each certification offered by Strategic Learning Alliance and each industry certification supported by the Strategic Learning Alliance.

Benefits For the individual:

- **On average, certified professionals earn 30% more than peers (Payscale, 4/2013)**

- **On average, certified professionals are promoted or hired 92% of the time (SHRM, 2010/12; SRP, 2013); while the average odds of being hired if interviewed are 10% (NYT, 10/2013). Connect the dots!**

- **On average, certified professionals are 3 times more confident in their applied competencies than their peers (SRP, 2014).**

- **On average, certified professionals improve employee engagement by 30% in as little as 6 weeks.**

Benefits For the organization:

Unlike academic degrees, professional certifications, the SLA can accredit an internal process conducted by the organization to train, evaluate, and certify which individuals are the top-performance (competency and application based) BEFORE you hire, promote, or invest in those measured through certification.

Certification through the SLA cuts through the fluff and focuses on WHO HAS AND SHOWS they can engage complex settings, focus, and apply themselves through creative-cognitive performance (Rand, & SRP, 2007-2014):

- Hire the right person, by contracting recruitment/retention options for coaching, HR, and negotiations. SLA certifications can be customized to ensure you hire COMPENT individuals, BEFORE you invest into them with assurances they perform at the top 20, 15, or 5% in academic and/or professional knowledge and performance.

- Screen ineffective employees in as little as 2 days to 14 days with 80% certainty the individuals who are successful possess the natural skills to be the best person for the team!

- Cut through personality, time, and challenges of external consultants by leveraging tools, learning, and certification to empower your team toward mastery, autonomy, and purposefully organizational contributions (see Pink, 2010).

- Advance an employee-centered organization established on applied & continuous learning.

Tool 6: Associate Membership Gift

Learning is an inspired change in behavior; therefore, each SLA member will receive opportunities and instructions to share associate membership access. Locate the Associate Membership Gift page to share with your entire network. Sharing the Associate Membership Gift is a $95 savings to each person you provide access to during your initial 30 days as an SLA member.

Tool 7: Applied Thinking/Learning Tools

This packet, and other courses, will reference tools that are used to ensure learning, strategic thinking, critical thinking, project management, HR, coaching, team engagement and other core competencies of an applied learning professional become SIMPLE, EASY, and REGULAR. Use these tools to help build a HEALTHY habit of top performance through applied learning in your immediate career role. Tools include:

- Reflection (Executive Brief) template
- Individual MAP
- Team MAP
- Gantt Chart(s)
- Strategic Learning Survey Documents
- "Mini Workbooks" to share with others to help them strategically learn
- And more.

Survey the Content

1) **Access the membership site here**: www.strategiclearningalliance.com

2) Complete the work sheet on the next sheet.

These notes should pertain to answering the 3 to 5 thought provoking questions you created in step one. Use the Syllabus Tracking Sheet to learn about each tool in the proper order.

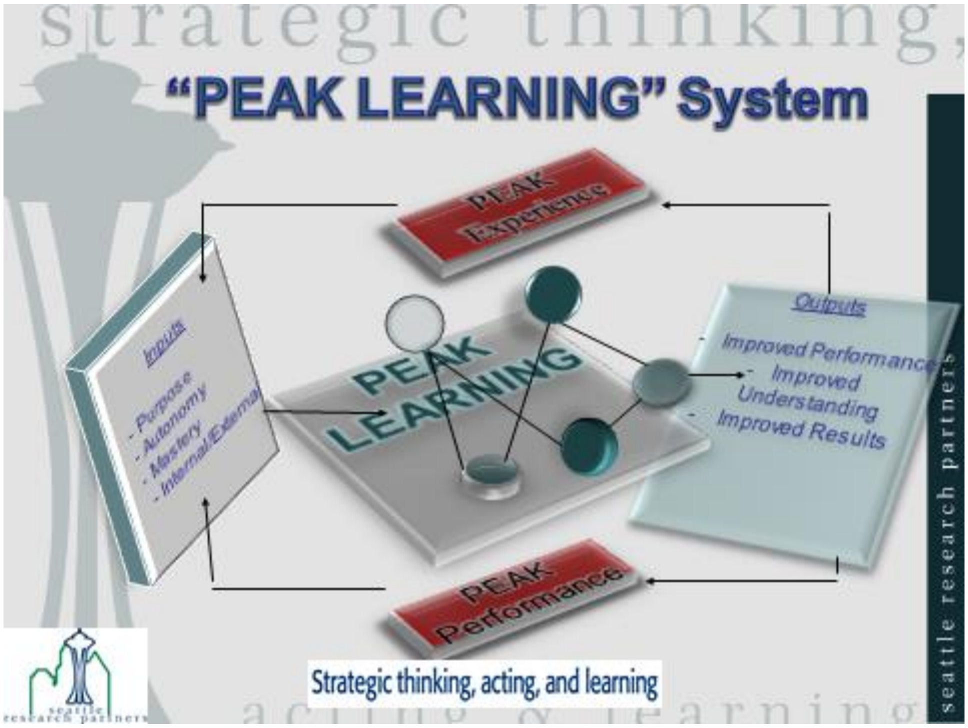
What I Know About:	List (bullet points only; not long narratives)
SLA Membership	

Core Values Index (CVI)	
Improved Employee Assessment Tool	
CDS	

SLA Blogs/Research	
SLA Benefits/ Certifications	

NOTE: You are encouraged to take these notes by hand and attach them with your final reflective statement as supporting evidence.

Step Three:



Design an Applied MAP by Analyzing the Tools

Outline the membership site, complete all steps per tool listed on the membership site, take assessments, watch videos, and SURVEY the reading material provided within the membership site.

As you do so, complete this section of the workbook.

You are encouraged (after completing this packet) to return to the readings, reports, assessments and engage them line-by-line after completing this workbook. Such application will enhance your knowledge. Remember to create 3 to 5 guiding questions for each tool and reading and then complete the following:

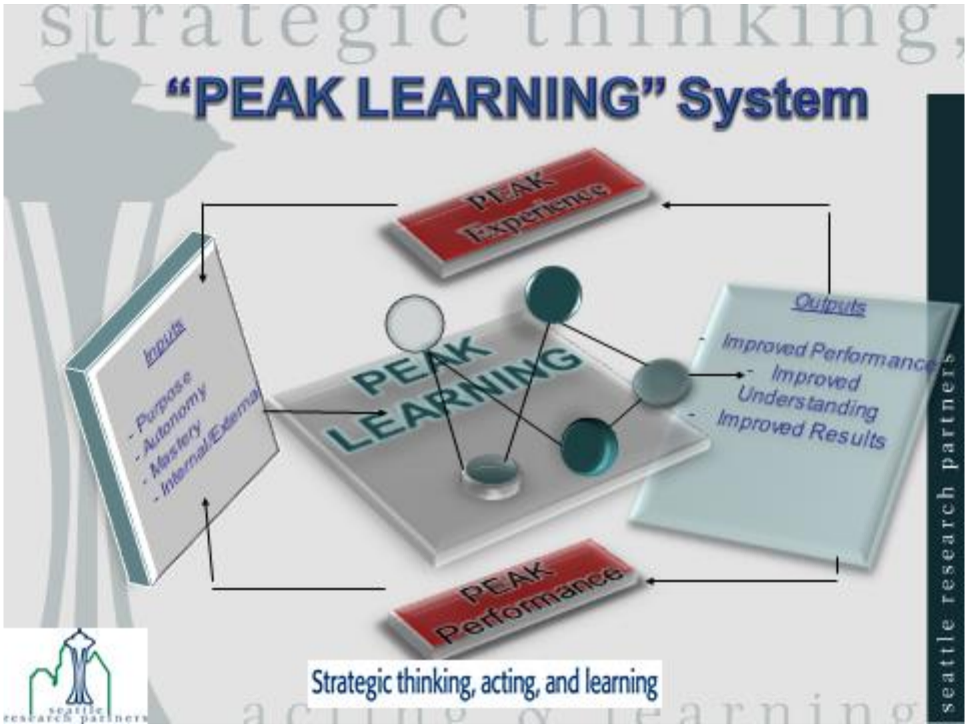
- Create an outline as you survey the tool, resource, or program provided by the SLA.
- Look for key words and phrases
- Note questions/concerns/AH-HA thoughts
- ***Resist the urge to write copious notes***
- ***Only spend between 1-2 hours MAX per tool listed in Step 2!***

Create an outline about the reading. Remember, your objective is to benefit from these assessment tools, engage in a process for basic understanding and learning about the tool, and then spend time over the next year learning more details about the tools after you have had a chance to apply them with up to two clients per tool.

Your Outline

Note: the space is INTENTIONALLY limited; keep it simple; keep it concise! You are encouraged to turn the notes in as a supplement to your reflective statement. See sections to come.

Step Four:



Design an Applied MAP to use SLA Benefits

To complete this, read each item below. Locate the templates in the Resources/Tools and complete the following process:

- **Goal Clarity Document:** setting goals is less effective than creating strategic SMART Goals. Complete the goals to improve your ability to create SMART goals as goal setting will be necessary to complete step 4. In-document Sample (here) & instructions (here) or online in membership Resources/Tools.

- **Reflective Statement:** the process of learning under the PEAK Theory involves the stages of understanding, analyzing, evaluating, and creating. Use the template provided to ensure you complete a PROPER 2 page reflective statement based on the template provided. In-document Sample (here) & instructions (here) or online in membership Resources/Tools.

- **Professional MAP:** by having surveyed the tools, reading, and content, you should have an understanding of your career, have identified tools, resources, and opportunities for professional advancement, and are now ready to create an 1-2 page action MAP. A MAP, based on Drive Theory (Pink, 2010) and Professionalism: Effectively Applied Knowledge (PEAK)™ theories is your 1-2 page tracking and accountability sheet. Using a MAP increases odds for successfully applying learning 3-fold (Rand & Associates, 2013; Rand & SLA, 2013; Rand & Wainwright, 2014). In-document Sample (here) & instructions (here) or online in membership Resources/Tools.

This experience should take 2 hours MAX.

Using the instructions/templates, complete a learning MAP (see Supporting Documents) based on a specific plan to engage, test, share and use SLA tools.

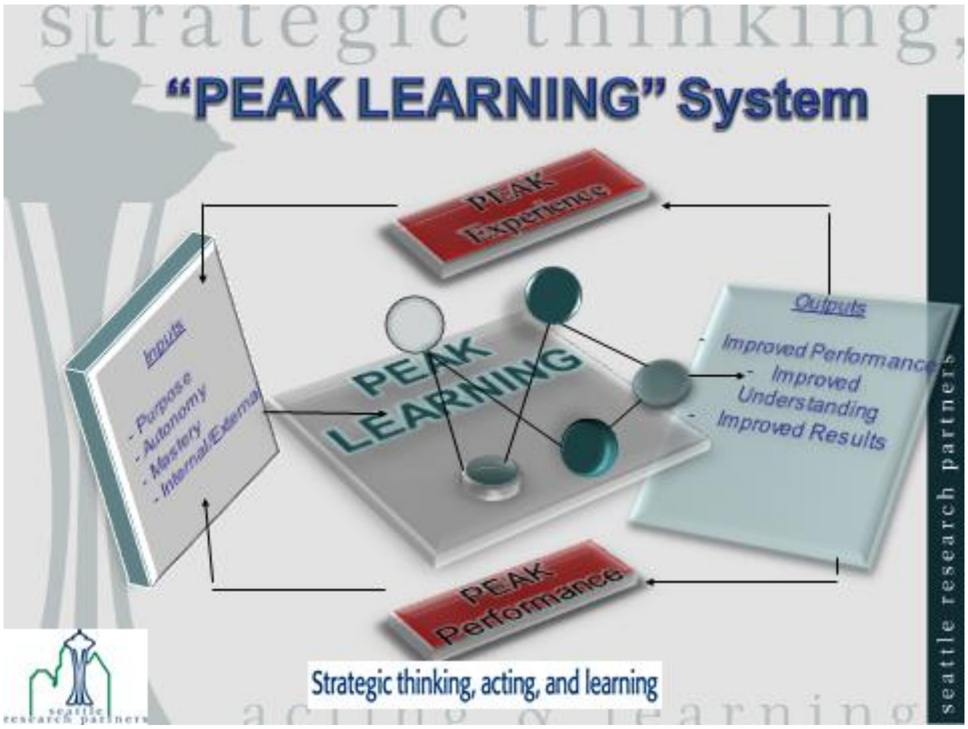
Complete a reflective statement (2 pages; see Tools/Resources online in the membership site) and answer the following:

What did you believe applied learning to mean? Set a goal based on what you have experienced through this opportunity. Outline the 3-5 specific steps using proper formatting to explore, discover, design, and implement opportunities to leverage SLA membership to be a more engaged, inter-dependent, and choice-based applied learning professional.

Email your final document (no more than 4-6 pages) to:
recertification@strategiclearningalliance.org

IMPORTANT: please list 8 EXPLORE SLA CEUs as the subject line. You should send ONE document that includes: your applied professional MAP (1-2 pages); reflective statement 2 pages; 1-2 pages of "work product" from the goal-setting documents. PLEASE USE A COVER SHEET!

Step Five:



Share the Assessment(s)

Follow the instructions for having your client complete the assessment!

You **MAY NOT** charge your clients, friends, or co-workers for access to any tools; but you can obtain increased access to many, so just ask your SLA rep for assistance!

You may use your membership tools to gain business, build client relationships, better engage employees, and in paid positions/roles. Any member sending out more than 5 access links/tool may also incur full retail fees charged by the companies unless provided authorization in writing prior to sharing the assessment links given through SLA with more than five total individuals (including your own assessment).

For the CVI you will copy and email the link that is provided in the membership site under the CVI menu links. Be sure to use the exact URL provide to ensure your client received the FULL CVI report which is a $75 gift from you! If they take the free-version or coach's version:

1) They will not gain the FULL report that you need to better engage them;
2) They may be charged full retail value.

Therefore, be very sure you send them the proper link for the CVI (client access) per the step by step process in your membership site.

For the IE assessment, you will use the tutorials to create a "campaign." You will send that to up four participants. They will complete the assessment so that you receive the "coaching pack" that includes 24 paged report about tips for best coaching the individual. Your clients will each receive the 2-page Soft-Skills report; but only you will see their full 24 page report.

In both cases, please be sure to complete any follow-up assessment surveys requested. These should be 1-3 paragraphs in length.

You have 90 days from first accessing the SLA Membership site to give the gift of applied learning to unlimited members of your network. The following approach is recommended:

- Send blast emails to linked-in and professional contacts; see resources/tools;
- Inform them that you have a complimentary associate membership gift, a $95 value, you are authorized to give them at NO COST.
- **Provide the FOLLOWING URL:** http://strategiclearningalliance.com
- Proceed to identify the individuals or teams you wish to provide the CVI, IE (employee and team-builder) assessments to for no cost. These are also $45/gifts per individual and assessment. **Your limit is 5.** Follow the instructions within the membership site for sharing these tools!

Appendix Exercises & Templates

Use these templates to ensure you:

1) Practice setting SMART GOALs;

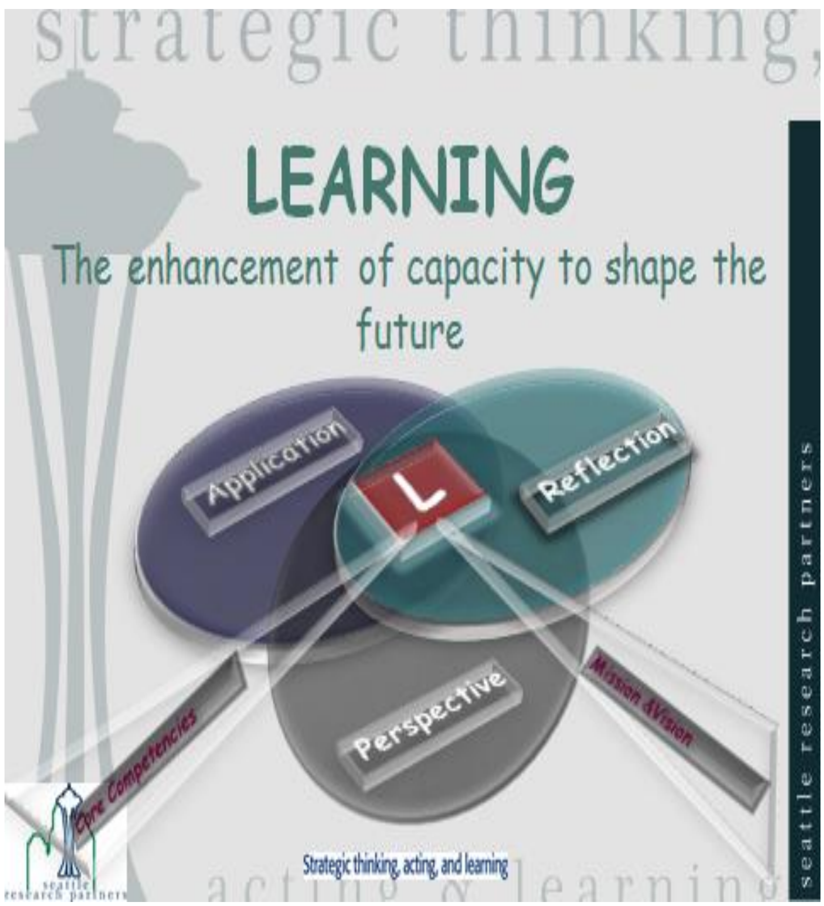
2) Complete a reflection that answers: what is my professional background; what are my 3-5 year goal that ensures mental, spiritual, physical, & social/emotional success that is related specifically to improving my professional role through applied learning. (Ideally this is a 1 sentence strategic professional goal)?
    a. Outline your plan to use SLA tools as a professional
    b. Write a summary VISION statement for what life/work will be like (performance and experience) based on that achievement of the goal.
    c. Write it as though it has already happened! Want to learn more about crafting a SMART vision? Consider becoming a coach and learn the process at www.cpc-success.org

3) Using the MAP, create an individual life purpose statement (1-4 sentences), 4 SMART Goals (one for mind, body, spirit, and heart), and select a specific work, group, or team experience you will share, apply, and resolve using one of the SLA tools. Set a schedule. Keep this in the outline format provided in the template and examples.

4) **Email results with "8 CEUS: Strategic SLA Exploration" in the subject line to:** recertification@strategiclearningalliance.org
   If a reviewer does not have the following, you may not receive your CEUs:
    - Clear use of Reflection Template, MAP template and at least 1 page showing you took notes using this document
    - Clear application of SMART goals for long-term life achievement and not just short term vocational improvement by mastering goal setting using the appendix exercises.
    - Reference and demonstration of understanding (NOT MASTERY) of SLA tools
    - References on the schedules to demonstrate a plan to re-engage, apply, and more deeply MASTER SLA tools AFTER completing this packet.

Section Five:

Fundamentals & Preparation



Introduction: Methods of Applied Certification

The following section is designed to help ensure that professionals learn, experience, and apply their knowledge for the specific purpose of passing an applied certification. There are two-types of certifications. The first, is an industry certification. Such a certification measures tested knowledge of a very specific topic, such as Society of Human Resource Management certification (SHRM; PHR/SPHR certifications) or Project Management Institute (PMI). The other is applied certification which tests the skills used by all professionals regardless of their specific role or industry title (see SLA & Rand, 2013).

Applied certification requires that professionals demonstrate their applied effectiveness based on established measurements of learning, performance, and experience. To this end, participants are required to attend a collegiate course and submit two portfolios. In addition, their performance in the class content is tested and benchmarked using perceptual-validation of co-learners, instructors, and self-reflection. The culmination of these scores results in a determination of whether a professional will earn certification.

The following pages will help you apply techniques to ensure that when you compile necessary documents for certification, that you do so at a level high enough to ensure you earn certification. It is VERY important that you complete each step in this section.

Research shows that individuals who possess on average 30% experience compared to peers that complete these steps will not only pass the certification, but on average will outperform by 10-15% those same peers holding 70% more experience in a given role (Rand & SRP, 2013).

Crafting a Strategic Personal "MAP"

This section of Learning & Leadership will help you master the concepts of creating a personal "MAP." Let's review the concepts of a personal "MAP". "MAP" is drawn from the concept that your life, career, or learning is best motivated when you create a plan that promotes customization (autonomy), effectiveness (mastery), and purpose (see Pink, 2010). Research demonstrates that when individuals choose to engage in the purposeful process of learning by creating a "MAP" they increase their performance by over 30% (Rand & SRP, 2013).

A personal "map" creates also the visual for your life journey. As we reflect on the concepts of individual, team, department, and organizational well-being (see pages 40-60), we are reminded that each individual has both distal (strategic, or long-term) goals and short-term (critical, or tactical). Creating a "MAP" is a fundamental process for attunement, buoyancy, and clarity to ensure achievement of desired objectives in a holistic manner (see Rand & SRP, 2013; see also PALI & SRP, 2014). Such a process ensures that individuals effectively apply their knowledge and learn through very specific life objectives.

The key is to remember that a "MAP" is also a visual image: it is after-all a map toward success. Think of this, if you are going on a trip it is more likely to arrive at your destination if you have a map, then to simply just start driving? Absolutely! A map, then, provides people with the intended "trip" they seek to take. The first step, however, is to establish the unchanging purpose and methods for which to take such a journey. This is known as the purpose and values section of a personal "MAP".

Once an individual clarifies their purpose, they identify the unchanging values that guide their journey. These values are similar to key destinations on the map that they will ensure are achieved. For example, if your "Purpose" is to travel across the United States, the values will tell you the key destinations that will be visited along the way. In other words, the purpose and values create the intention by which an individual chooses to live their life.

Following the development of the Purpose and Values section, a "MAP" becomes customized. The first step is to clearly identify key life-roles. Because life is a journey, there are certain roles that are continually present throughout the lifespan. As a result, prioritizing those goals ensures that a person will balance their performance and experience in a manner that reflects the roles and responsibilities necessary to being a holistic individual. This may include being a spouse, a father/mother, a sibling, an employee, an employer, a volunteer, and more. Ideally, a person should identify no more than five key life roles when creating their map. They should update their plan as their life achievements and roles change over their lifespan.

After establishing the purpose, values, and roles; a strategic "MAP" identifies four distinct domains of well-being (see pages 40-60). In a comprehensive life map each domain should include a one page "MAP". The goal should be supported by three to five initiatives (steps) needed to achieve this goal. Remember, that a domain remains relatively unchanged over a three to five year period. These supporting initiatives ensure that a person has a clear plan for achieving the specific domain of well-being. These steps are often critical in nature and include regular assessment and benchmarking (review pages 1-40 for the process of linking strategic and critical achievements through benchmarking).

However, in a short-format version a person should create a strategic SMART Goal© that is 4-6 sentences long with at least one sentence directly related to the person's goal for each domain including mind, body, spirit, and heart.

Consequently, they will have a single statement that includes their ideal long-term achievements. In this case, they should select one specific element of well-being and then craft supporting steps based on that element.

For example, research indicates than many individuals might have an idea of their long-term life goals, but are frequently put into reactionary positions due to career or fiscal set-backs. Focusing on career and fiscal set-backs, therefore, becomes a potential weakness for anyone seeking well-being. However, when a person is coached through a process of clarifying their long-term purpose, values, and holistic roles/goals, they can be coached through a process for how to leverage immediate vocational and fiscal opportunities. As a result, while the person's immediate and in-depth plan may focus on short-term elements, it is still firmly rooted to their deeper and unchanging plan to live life more fully than simple occupation or financial gain.

The ideal personal "MAP" should be a total of ten pages. This should follow an outline of:

1) To know thyself: strategy (one page)
    a. Purpose & values
    b. Roles
    c. Strategic goal (holistic)
2) Well-Being Achievement: four domains, one per page (four pages)
    a. Summary of purpose & values
    b. Articulation of the roles and resources to achieve the specific domain with three strategic goals (updated once a year)
    c. Articulation of 5 to 7 short-term actions to ensure achievement
    d. Visual schedule (summary)
3) Elements of Well-Being: in-depth planning (5 pages)
    a. One page per element: fiscal, occupational, emotional/social, mental, and physical
    b. Specific actions to take over 30-500 days to achieve the goals
    c. Updated monthly

It is important, however, to remember that a "MAP" should be customized. Therefore, a "MAP" could be a plan of action for a short-term situation. For example, did you create a learning MAP before starting this program?

In this case, your MAP should always identify your purpose and values, but then will focus specifically on the key achievements you seek to fulfill (in this example through learning) and then identify your plan to maximize learning (say over a 6 to 12 week period). The more clarity and regularity you apply in creating planning maps, the statistically greater your achievements will be (Rand & SRP, 2013; PALI & SRP, 2014).

Crafting a Purpose with Core Values

Crafting a purpose is rather simple. However, the common error is that people will often define their purpose as being tied to an **element** of well-being. DO NOT MAKE THIS MISTAKE. The following will help you understand this common error.

Exercise One: underline elements of well-being in this statement:

My purpose in life is to become dynamic in all aspects of being a professional coach. I will help others recognize and unleash their potential in health and wellness coaching so that I can build my dream business and earn financial freedom by working three days per week.

Review: The following identifies the elements of well-being that weaken this purpose statement.

My purpose in life is to become dynamic in all aspects of being a professional coach. I will help others recognize and unleash their potential in health and wellness coaching so that I can build my dream business and earn financial freedom by working three days per week.

Exercise Two: revise the goal (be creative) and then review a sample below.

Sample: Possible revision

"My purpose is to explore life to the fullest by being a fisher of men; I will use my talents to help guide others toward achieving their own well-being so that I may fully come experience my own dynamic potential by having shared a life-time of helping others achieve their dreams"

The establishment of values is often left out of purpose statements. Values are also commonly overly described. In the ideal personal "MAP" values should be three to no more than five descriptive words. Helping people identify values can be easily achieved by walking them through the process of concept-mapping (see page 1-40). Ultimately, values are the common, relatively unchanging, descriptions by which people will consciously choose to benchmark their everyday decisions. For example:

"My purpose is to explore life to the fullest by being a fisher of men; I will use my talents to help guide others toward achieving their own well-being so that I may fully come experience my own dynamic potential by having shared a life-time of helping others achieve their dreams… I will achieve this by ensuring everyone I engage will be touched by my humor, my empathy, and my patience…."

Compare the sample above with the original purpose. Notice how the purpose and values set a very clear, but seemingly broad intention yet gives very specific indication for how one will choose to live daily? The key, however, is to create a MAP that fully articulates now the specific domains and elements of well-being that will further define the short-term and long-term goals needed to achieve a purposeful life.

Crafting SMART Goals© (Rand & Rand, 2010)

In Strategic Thinking, Acting & Learning (STAL; Rand & Rand, 2010), the SMART Goal© process is defined. All too often, individuals set goals; but these goals lack attunement, clarity, and buoyancy to result in self-motivation (see Pink, 2013). As a result, the SMART Goal process becomes paramount to any individual or professional seeking career advancement. However, the deployment of goals must be consistent with Professionalism: Effectively Applied Knowledge (PEAK)™ to ensure maximum optimized experience and results through learning.

GOAL Activity One:

To start, review the goal that you set for learning using the applied activities in pages 1-40.

Using the template below, can you place the components of your goal into this matrix?

S	
M	
A	
R	
T	

Setting a goal is not simple.

The following activity will help you apply fundamentals of critical thinking and strategic thinking to create proper SMART Goals©. Critical thinking begins not with setting a goal, but understanding the situation. The situational context is a process for counting, measuring, and gaining an understanding of the issues and root-cause of a situation (for examples, see the section on the critical thinking process). Critical thinking reveals "issues" or "problems." However, effectiveness teaches us that a professional chooses to see these "issues and problems" as "opportunities" to leverage personal strengths for desired improvement (Rand & Associates, 2013).

To this end, this activity will walk you through the process of first analyzing a situation and writing an issue statement that properly identified symptoms versus causes:

> ***As a professional, SAM is experiencing frustration. He has been in his current role as a line-supervisor for over ten years. While the company has steadily provided pay increases each year of 2% or more, his annual reviews are declining steadily. He senses that life has become go to work, go to bed. Recently, SAM was called into an unexpected review. He has been tasked with identifying a path to improved employment results or risk termination within six months. In this meeting, SAM's performance was measured to be at 40% of the average line professional. His direct reports also felt that his ability to engage them well was at less than 40%.***

Using the critical Thinking Process, identify the root-cause. Remember, symptoms result from causes. Causes may be unknown (see GAP in the critical Thinking Model). Be creative!

Write your answer:

MODEL Answer:

SAM's performance has decreased to 40% in the work place; his direct reports feel he is not engaging them well; and he feels frustrated in life because of a lack of well-being and clarity for career opportunities that challenge and inspire him.

RATE YOUR ANSWER (on a scale of 1-100 for accuracy):

Using the matrix and creativity, write a tactical SMART Goal© that will help SAM focus on improving potential causes:

S	
M	
A	
R	
T	

COMPARE with a SAMPLE MODEL ANSWER:

SAM **will** attend three seminars on well-being put on by the organization over the next three months; engage in one month online training course to be a more effective supervisor weekly through a professional development course; and will seek 360 feedback monthly for the next 12 months so that he improves his personal and organizational performance from 40% to 80% within 6 months by learning to better understand opportunities in life that do not work around work and pay.

Review:

S – very clear directives

M – 40% to 80% improvement

A – Taking classes, receiving regular feedback, and exploring learning opportunities

R – The goal does not assume performance improvement will occur immediately; it identifies a range.

T – Each step is specified on a time-frame.

Rate your answer (from 1-100 based on accuracy):

Crafting Strategic SMART GOALS

Strategic SMART GOALs are different than tactical goals; these goals do NOT focus on immediate problems. Drawing from the concepts of visualized goals, positivity, and individual effectiveness, the Strategic SMART GOAL© requires you to positively identify future achievements three to five years from now (Rand & Rand, 2010; see Covey, 1991; Frederickson, 2006). Strategic SMART GOALS© should be built around the four domains of living: Mind (cognitive achievement), Body (physical optimization), Spirit (transcendent experience) & Heart (emotional) (see Rand & Associates, 2013). Therefore, each sentence should reflect one of these components. Let's have a try:

> ***In follow-up coaching sessions, SAM identifies that he has become socially alone since his wife passed. Over the years, he replaced her company with TV and work. However, now that he is aging, he feels in a rut. However, he does not feel earning a degree is his solution; but he has identified a new management position that will keep him out of the heat and noise of the front-line workshop, but still use his experience to develop new talent. SAM struggles with being in groups because he doesn't know what his passion is, but he learned in the recent seminars at work that recreational activities can help a person improve their mental outlook in life. Realizing he is years from retirement, SAM feels confident his performance is improving, but knows he must do more than simply work for a promotion.***

Create a STRATEGIC SMART GOAL. Review the concepts of strategic thinking in your assigned SLG to help:

S	
M	
A	
R	
T	

COMPARE with a SAMPLE MODEL ANSWER:

Over the next three years, SAM will improve his well-being by developing his mind, body, spirit and heart through several opportunities. He will continue to explore affordable business courses so that within three years he has been promoted to

Organizational Coach; he will join a social recreational club and tryout a new recreation each year by engaging in group events monthly until he finds his passion; he will begin dating to develop deeper emotional connections; and he will pursue the support of a spiritual coach to help him overcome his emotional loss and think more deeply about his life-mission.

REVIEW by Dissecting the GOAL:

Mental	
Emotional	
Physical	
Spiritual	

Application: Creating a personal MAP

Complete the following activities above and post them into your Career Development Template (see your course-room or sample provided in this book in the next pages). Use thinking tools defined in the SLG to explore, discover, and creatively identify opportunities you have to improve your well-being. Take this seriously, focus on creativity, and write succinctly. This template should be used several times to create a 3 to 5 page outline for short-term goals (critical thinking) needed to achieve your long-term (strategic or distal) objectives.

The strategic goal should remain the same for each page; but each domain (mind, body spirit, and heart) should have 3 to 5 tactical goals with one page per life domain. Unless you are required to develop this level of a comprehensive plan, focus your tactical goals on steps for professional development within the next 24 months to support your strategic goal. This template, therefore, will be only one page in length.

Finally, follow the instructions for creating a Strategic Career-Development MAP and MODERN RESUME©. See the provided examples on the following pages as well as documents provided in your applied course-room.

Crafting a Reflective Summary

Learning ought to best be applied by professionals through immersion. Immersion is an intensive endeavor to passionately and intensely engage a given situation (Rand, 2014; Moustakas, 1990). So far you have immersed yourself into a process of learning to learn. However, learning occurs in multiple modalities. The coming sections will help you immerse yourself into the learning experience through a process of perceptual-validity.

Perceptual-validity is a process whereby we seek to know ourselves better by focusing our involvement and engagement on external and creative experience that involves input and engagement of others.

For example, we might reflect on the concept of retirement and draw a picture of what retirement looks like to us. Then we may have three co-workers reflect on the concept and draw their own version of the experience. Each of us will write a one page description for why the image we created best depicts the experience. Using principles of perceptual-validity, we would all then all meet. We mix the pictures up into a single pile and then show them one at a time. Each of us then articulates what the specific image means to us as it relates (in this sample to retirement) to the topic. After we have all shared our thoughts, a moderator (or leader) then reads the original paragraph provided by the individual who drew the picture (note: confidentiality is always best).

Imagine the results!

At the end of such an exercise, the group can then create a one paragraph description based on the common descriptions provided by the group specific to the topic (again, in this case the experience of retirement). They can even create a collage, or new image, of the experience based on their subjective and perceptual validation of the experience.

This section will highlight the process for creating a reflective summary that is based on learning a subject, identifying application, and then articulating creative opportunities to use tools as a professional to improve one’s choice to be a leader. There is a key method to remember when creating a reflective summary.

- The reflection demonstrates your analysis of past experiences (3/4 of a page)
- You demonstrate learning by applying ONE (only one) thinking model defined in this manual (analytical skills)
- You demonstrate your process thinking by outlining steps to achieving a goal which further demonstrates your learning (learning skills)
- You provide supporting documents that show your analysis for the future goal attainment (thinking skills)
- You depict a future statement that articulates what it will be like when the goal is achieved (proactive confidence/visualization skills)

The following template and notes will help you further understand a reflective summary.

Learning Tool: Creating a Reflective Summary

Complete a reflective summary by using the following template. Remember to adequately apply either critical or strategic thinking when analyzing your experience. If it is critical, you should identify a situational problem and articulate possible causes. Then you should create a SMART goal for resolving that problem by applying your learning.

A reflective summary is a form of learning-based research. By creating a reflective summary, research shows that we accomplish significantly more by taking the time and patience to fully understand, analyze, and learn possible solutions (Rand & SLA, 2014). For the purpose of applied certification, a reflective summary (also may be called an executive summary) will be no more than two pages in length. However, you should include supporting documents that demonstrate your applied thinking, acting, and learning used to create the summary. In other words, the actual typed deliverable should be supported with one to three pages of supporting documentation that was used to create your summary.

Using a word document, copy only the BLACK parts. Use the text in red to help you add content to your template.

Background: This should describe 1-3 past experiences specific to your certification you are seeking. For example, if you are pursuing the Certified Professional Negotiator (CPN) through the Strategic Learning Alliance (SLA) you would reference a summary of prior negotiations. You should write with IMPACT (using the MEAT model). This should be no more than ¾ of one page!

Issue (Critical situation only): In one sentence define the problem and three to five possible causes. Do not make the mistake of under analyzing by identifying only one or two possible causes. For example, "I struggled at prior negotiations because I did not use a process, I did not adequately analyze who I was negotiating against, and I did not ask clarifying questions."

Goal: The goal should be EITHER strategic OR critical. Choose one based on the situation. Most commonly, the desire is that you select a tactical approach and goal to immediately improve your applied performance. Remember to use the specifics of creating a SMART goal!

Plan: Use your learning! Apply the process of outlining. Here is a tip, applied certification will seek to see very clear application of your outline and plan to improve your applied performance based on the thinking models presented in this book. For example, if you select a strategic plan for improvement, then you should have one heading per step in the strategic thinking process (Explore; Discover;

Design; Implement). If you selected a tactical improvement plan, then you should include the steps for: Strategy; Analyze; Design; Implement; Monitor).

The plan should use outline format and have NO MORE than FIVE headings supported by two to five (max.) actions. For example:

> ***Explore:*** explore opportunities to achieve my career goals by leveraging my applied certification to increase compensation by 30% over the next three years by:
>
> 1) Promoting my new credential (CPN) on my resume, my email signature block, and my Linked-In account to demonstrate visibly I have been independently certified as a negotiator;
> 2) Meet with my boss quarterly to discuss potential negotiations that I can continue to apply my learning to ensure a proper process is followed that improved company ROI and my chances of bonuses.
>
> ***Discover: follows the same process as above.***

Summary: The summary should be one to three paragraphs that uses proactive positive wording. This should demonstrate your vivid description of achieving the goal. You should present an argument in 4-6 sentences per paragraph that very clearly defines what will occur when you have achieved the outcome. Do not make the mistake of repeating what was already defined in the prior 1 ¾ pages!!!

A descriptive summary statement is meant to provide confidence, clarity, and motivation. Someone should read this final 1-3 paragraph section and believe that the plan you have created will in fact obtain the goal you set. The key here is to use words such as, "I will…" "when x has occurred, y will occur"

Supporting Evidence: (Appendix) This section should be 1-3 pages and include notes, assessment results, data, or supporting thinking tools (such as mind-mapping, relationship diagraming, Gant Charts) that provide evidence to support your plan. In most cases for certification purposes, using handwritten notes and small images affixed to a single page is adequate. In other words, this section demonstrates that you applied thinking, acting, and learning tools to create your summary.

Template of a Personal MAP (Plan by Reviewing)

with innovative strategies proven to succeed

XXXX Learning Plan

Purpose:

Strategic SMART-Goal®:

Tactical Issue Statement:

Tactical Objective Goal Statement

1) Planning: phase one (3 to 6 months)
   a. 3-6 months focus on ESL courses at current provider, increase intensity to 3 classes a week;
   b. 3-6 months of basic typing and computer skill enhancement;
   c. 2-4 months of reflective audio-book learning.
   d. 1-3 months of intensive learning-based coaching to plan, create, and commit to the more robust phase two and three.
2) Seeing/Doing: phase two (2-4 months)
   a. Passive involvement: watch and learn by observing process
   b. Application: document and create procedures based on observations;
   c. Revise and correct to improve clerical and rudimentary skills
3) Getting/Leading: phase three (2 – 6 months)
   a. Focus on supervision of OJT projects for other Hispanic speaking participants and volunteers;
   b. Model and apply leadership while engaging in placement-services preparation
   c. Complete final professional/vocational assessments to ensure credentialed certification.

Key Role(s):

Schedule:

Monthly

Date	Action Item	Complete
	Planning	

Key Needs(s):

Summary

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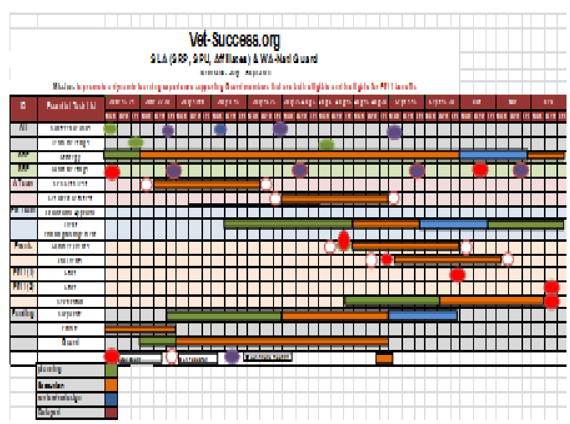
Attachment One: Time-based project outline

Role	Action Item	Date
	Planning	
	Performance Based Schedule	
	Tuition	
Total	(SLA tuition and supporting translation needs)	20-25,500



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SAMPLE TWO: Plan by Reviewing

SAMPLE Planning MAP for Learning and Career Development

Purpose:
To become promoted to the Director of HR serving XX County and empowering my wife and I to live our dreams in XX by enjoying the recreational activities, weekends free, and continued educations by obtaining our masters degree's online over the next three years.

Strategic SMART-Goal©:
To improve my professional career by obtaining SHRM certification and recertification that includes the SLA Certified Negotiation Professional by winter, 2014; To obtain my MA in HR by summer, 2016; To build our retirement home in Montana using wife's income and the sale of our current house; To take weekend retreats once a month after we pay the bills from my salary to off-set large annual vacations while we save money but enjoy recreational opportunities in the state.

Life Roles:

Father – keep in touch with my son weekly by phone
Employee – leverage my strengths in negotiations to secure an opportunity to be promoted to HR director
Learner - leverage my 15 years of HR experience to earn my SPHR and Certified Negotiation Professional while earning credits toward my MA.

Tactical GOAL Statement:
To become recognized as a top 20% professional by obtaining SHRM certification and CPN certification by winter 2014 through:

- Effective use of the SRP program tools
- Attending class weekly
- Reading and applying the SLG program
- Completing weekly practice exams, using tutorials as a review to leverage may audio-visual strengths

Key Needs(s):
- Advance my average scores from below standard to 90% with 45 seconds per question
- To prepare by buying access to the HRA preparation exam to measure my retention results
- To get 8 hours of sleep and not studying 24 hours prior to the SHRM exam June 1st
- To leverage the early mornings for reading and SLG notes while others are in bed and before work

Summary
I will obtain my two key certifications by effectively using my time to learn, grow and achievement as a professional; meanwhile, I will balance myself to a limit of 12 hours a week of study-time over 12 weeks of preparation so I can remain attuned to my family, professional, and recreational goals.

(Tracking chart omitted; see Template and samples following the CDS instructions next)

CDS Professional/Learning Strategy Plan (Template)

Using a blank word document, create your template (or use one provided for you) by typing out the parts in BLACK only. The notes in red will help you elaborate on content

Purpose:
Use information from your learning so far to create your positive purpose/vision statement for life.

Strategic SMART-Goal©:
Use the methods defined to create a SMART Goal. This covers 4 life domains and synthesizes your purpose in 4-5 sentences max.

Key LIFE Role(s): these include mother/father, son, volunteer, vocational, etc. Three to seven at most, any more is too detailed. Any less is too limited.

Tactical Issue Statement:
Use the lessons and create issue statements for how you will resolve life-situations drawing from your learning. Issues should be one sentence listing possible symptoms and causes preventing short-term movement toward your strategic goal and life purpose.

Tactical Objective Goal Statements (create at least 3 and no more than 5 specific to your strategic goal by ensuring that you take steps to improve aspects of four domains of living)

a.
b.
c.
d.

Key Need/resource(s):

- Determine what will be necessary for achieving your goals;
- Material, opportunities, and engagements to facilitate your applied results;
- Identify opportunities for consideration.

Schedule: (Daily/Weekly/Monthly/Annual depending on goals)

Date	Action Item	Complete
	Time-Based schedule (sample)	

Summary:

WRITE WITH IMPACT 1-3 paragraphs maximum that explain your course of action and how this will culminate in achieving your goal. If you are creating a full plan (4-5 pages one for each domain of life, then this should be written only once at the end. A summary otherwise is a proactive statement to commit to your development plan).

Refer to your learning provider for a template Gant Chart. On the next page is an Image to help you create your own as well.

A Career Development plan must have a visual chart of any-type to help TRACK and MEASURE your achievement!

The Modern Resume is a current sample of a negotiation dossier. The dossier is the specific, measured, researched, observed, and on-going document for WHO a person is from a holistic standpoint. Creating a dossier should encompass the tools of thinking, acting, and learning strategically about those you lead, engage, coach and negotiate.

The Modern Resume becomes a valuable tool for negotiators in that when prepared by the individual, group, or teams you negotiate (with/against) a negotiation expert can more immediately think, act, and learn about the strengths, opportunities, and specific words that will promote a shared and inspired outcome.

SAMPLE of MODERN RESUME:

In this sample, the participant received over 25 calls and emails in less than 10 minutes; 60% of them were from hiring managers. She had three interviews within three days. She was successfully hired per her intent and currently earns 10% more a month working 50% less than before.

MALISSA L., B.S.N, HRA

Center St
City, STATE

Phone: ##########
Email: @@@@@@@

BIOGRAPHY/COVER LETTER

Malissa L. has ten years as a technical nurse expert in pre-labor and post-labor and delivery health-care. Upon graduating she launched her career at a small private hospital in XXXX that has afforded her the ability to become a recognized and awarded technical nurse as well as management leader. In addition to being a technical nurse, she has experience with training, LEAN planning and implementation, and staff-leadership as a regular charge nurse and floor supervisor.

Malissa is passionate about service and learning. She aspires to hold a professional career that affords her to continue to be successful as a single mother while pursuing her passion of launching holistic, service-based learning and coaching for new mothers and families. While attending to this non-profit aspiration she is seeking a role that will ensure she is available for her family in the evenings and mornings with a day-time or flexible staff-nurse (or administrative/quasi-management) position at a reputable hospital that values top client service, proven experience, employee effectiveness, and innovative planning and service delivery.

Malissa is seeking a day-time position or per diem (PRN status) employment in the Seattle-Metro and surrounding areas. Seeking a hospital looking for an experienced labor & delivery nurse with ability to hold a technical staff role and/or management position within the labor & deliver department. Ideally, she looking for a small-environment or unit that values committed work-staff, focused and independent employees, and an environment that appreciates and values independent contributors. She would like a position that will afford her the opportunity to continue to apply her developed team-soft skills as a leader, communicator, and quasi-manager but that will also afford her the opportunity to continue to apply her technical expertise as a registered BSN. Having worked for a small and private hospital, she is open to both public and private institutions. Ideally, she will not only be responsible as a technical staff member, but will be valued in a role developing holistic medical support, training, & coaching programs for new families.

PERSONAL/PROFESSIONAL PURPOSE & VALUES

I AM SEEKING GAINFUL EMPLOYMENT IN A CHALLENGING AND REWARDING NURSING, OR HEALTHCARE ADMINISTRATIVE ROLE, WHERE I CAN LEVERAGE MY TECHNICAL TRAINING AND MY PERSONAL VALUES OF **SERVICE**, **NURTURE**, AND **LEARNING** TO HELP DEVELOP PROVIDE SUPERIOR-CARE NURSING AND PROGRAMS FOR NEW MOTHERS WHILE GRADUALLY BUILDING MY OWN NON-PROFIT DEVELOPMENTAL CARE PROGRAM.

EDUCATION & PROFESSIONAL DEVELOPMENT

GENERAL EDUCATION REQUIREMENT FOR BSN: COLLEGE AND LOCATION, SEPT 1997- DEC 2000
BACHELORS OF SCIENCE & NURSING (BSN): COLLEGE AND LOCATION 2001-MAY 2003
HUMAN RESOURCE ADMINISTRATOR (HRA) CERTIFICATE, SEATTLE RESEARCH PARTNERS MAY 2013

PROFESSIONAL EXPERIENCE

ORGANIZATION: RN/BSN, LABOR & DELIVERY: 2003 – PRESENT

Malissa has held both technical and professional roles in her 10+ years of experience as a registered nurse. Her core competences are centered on premium service delivery to patients. Drawing from her ability to rely on her various soft-skills, Malissa has become adept at leading nurses through dangerous and intense situations. She provides consults to non-staff managers regarding staffing needs, care-requirements, and training performance.

Charge Nurse

In this role, Malissa has become the recognized leader of both day and night shift crews by managing patient requirements and staffing volume. Drawing on her technical expertise she is widely recognized and endorsed by OBGYN doctors for her ability to take-charge and ensures patient safety and satisfaction in the most intense of situations. She regularly trains and provides coaching for new nurses within her unit. In this role, Malissa has contributed in the following manner:

- MANAGES DAILY STAFFING REQUIREMENT AND PATIENT ASSIGNMENTS
- ACTS AS THE PRIMARY POINT OF CONTACT LINKING DOCTORS AND STAFF NURSES
- DELIVERS SUPERIOR SERVICE RECOGNIZED BY PHYSICIANS IN QUARTERLY REVIEWS
- PROJECT MANAGEMENT BY HOLDING THE RECORD FOR MOST DELIVERIES IN A SINGLE SHIFT

LEAN Management Team Leader

In this role Malissa worked with the organizational development specialists and senior operations management team members to strategically assess opportunities for implementation of LEAN principles within the labor & delivery ward. Relying on her expertise as a technical staff leader, this team was tasked with the responsibility for profitably streamlining procedures by identifying, planning, learning, and developing the tactical roll-out for strategic infrastructure improvements. Working with this team, Malissa contributed to the design of tactical policy and initiatives and was appointed to act as the trainer for technical staff/nurse management personnel. In this role, she contributed:

- SUBSTANTIAL INVENTORY MANAGEMENT IMPROVEMENTS

- REDUCED PATIENT ADMIT TIMES BY AN EST. 30%
- RELIED ON SOFT-SKILL & LEADERSHIP TO BUILD COLLABORATIVE SUPPORT FOR CHANGE INITIATIVES
- COMMUNICATED AND SPEAR-HEADED AWARENESS CAMPAIGN TO LINK TECHNICAL STAFF WITH MANAGEMENT IMPROVEMENT INITIATIVES DESIGNED AND IMPLEMENT BY THE LEAN COMMITTEE.
- TRAINED UNIT MANAGEMENT AND TECHNICAL STAFF ON NEW COMPUTERIZED SYSTEMS FOR LEAN MANAGEMENT INITIATIVES

Staff Nurse
While Malissa started her role as a staff nurse over ten years ago, she remains in this position by toggling between quasi-management and leadership positions while continuing to profitably drive the organization by keeping her hours as a technical staff nurse. She has been recognized by team-members and physicians for:

- REGULARLY HANDLES DOUBLE PATIENT LOADS TO SUPPORT REDUCED STAFFING INITIATIVES
- RECOGNIZED BY PHYSICIANS AS THE MODEL IN SUPERIOR CARE DELIVERY
- FREQUENTLY REQUESTED AS A NURSING PROVIDER BY PATIENTS AND STAR-CARD COMMENTS

COMPANY'S ACCOUNTING CENTER: 1999-MAY 2003

While attending school and completing her BSN, Malissa worked in in the role of accounts payable as a management assistant. Having started as a temporarily employee, she was offered full-time work while in school. In this role she developed her skills of focus, detail-oriented task completion, and basic accounting and financial systems understanding.

- PROJECT MANAGEMENT SUPPORT FOR SUPERVISOR AND DIRECTOR
- DATA-ENTRY
- CLERICAL SUPPORT
- RESEARCHED AND PROCESSED ARCHIVED CLAIMS

AWARDS & RECOGNITIONS

Computerize Physician Order Entry: Super-User Presence Healthcare (Bowlingbrook, IL)
STABLE Certified, 2010-2012
Licensed BSN

TECHNICAL SKILLS & EXPERTISE

BASED ON MEASUREMENTS OF STANDARDS OF BSN/STAFF NURSING

- Expert in Q.S./Meditech
- Basic Fetal Monitoring
- CPOE awarded
- Staffing/management
- Epidural Catheter removal
- FCE insertions
- NRP (newborn resuscitation)
- CPR/BLS/ACLS
- Computerized order entry
- State HIV regulation reporting
- Level II NICU competent
- ISE insertion
- LEAN Principles of management
- IV/maternal and newborn venipuncture
- OR Circulating nursing
- PACU nursing
- PYXIS inventory management

Microsoft Word, Excel, Twitter, Facebook, and Outlook

SOFT SKILLS & EFFECTIVENESS

BASED ON MEASUREMENTS BY IMPROVED EMPLOYEES AND THE HRA CERTIFICATION (SJI, 2013)

- Allocates goals based on individual team-mate abilities
- Communicates original message in creative and original terms to team mates
- Genuine and approachable
- Essentials of Individual Effectiveness
- Thoughtful about team ideas
- Strong-willed and process-oriented
- Dependable, patient, & loyal
- Industrious, communicative, and dependable
- Essentials of Project Management
- Calming for team-members
- Critically-focused and competent in task-completion, disciplined execution, and independently committed/motivated to job performance
- Essentials of HR
- Detail oriented

www.improvedemployees.com

PROFESSIONAL-SERVICE PORTRAIT

BASED ON MODERN RESUME STANDARDS (RAND, 2013)

As a registered nurse I will assume responsibility and accountability within your organization. In doing so, I will apply my ten years of experience and skills in critical thinking, team-work, and technical areas of nursing to delivery of superior nursing care. The hospital or organization will appreciate my ability to make critical judgment decisions in an effective and efficient manner whether this in an independent or team role. The organization will benefit from my ability to regularly apply critical thinking and performance ability in the coordination of patient care. Moreover, because of my years of experience, the organization's management and physician teams will be confident in my ability to perform professionally, consistently, and accountably in accordance with nursing standards of care.

In such a role I can see myself using a variety of my technical and soft-skills. I will utilize the nursing process to assess, plan, implement and evaluate patient care; assess signs and symptoms indicating physiologic and psychosocial changes in the patient's condition; collect, analyze, and interpret data and information from health care members and documents actual and/or potential nursing diagnoses; I will plan for expected out comes, perform interventions on a process for superior care based on the plan of care, but also be ready to provide safe, comfortable, therapeutic, and proven methods of care to ensure client satisfaction. My history and references indicate that while working for your organization I will be effective in using clinical judgment in the evaluation of activities to meet patient care needs of an assigned unit/floor including establishing priorities. I will promotes interpersonal relations with patients/family/significant others, hospital healthcare co-workers, and physicians. Furthermore, I will use original and effective communication skills with all contacts while being objective and sensitive and portraying the organization in a positive manner.

In addition to my ability to regularly and routinely remain committed to various scheduling standards, I will provide leadership with my knowledge of the Nurse Practice Act, standards of patient care, JCAHO, and patients' bill of rights. This level of knowledge, expertise, and proven care will be valued by your organization and meet the highest levels of expectations established by peers, direct reports, physicians and management personnel. I look forward to helping your organization set a new level of care.

Key Points:

- **Length is not a concern**
- **Experience is limited to one company**
- **See Competencies versus Tasks-delivered**
- **Visualized depiction based on a sample of three job postings.**

END: SAMPLE MODERN RESUME

MODERN RESUME TEMPLATE

NAME AND CERTIFICATIONS!!!

DON'T HAVE CERTIFICATION, VISIT WWW.STRATEGICLEARNINGALLIANCE.ORG ASAP. 92% OF NEW-HIRES HOLD CERTIFICATION.

Contact info

BIOGRAPHY/COVER LETTER

Using the Bloom's Taxonomy Method, create a 1-3 paragraph BIO that includes the key words you identified while using the SLG thinking tools when analyzing three to five job postings. Do not copy lines from those postings.

PERSONAL/PROFESSIONAL PURPOSE & VALUES

INDEPENDENTLY OR WITH A COACH, CREATE A PROFESSIONAL AND INDIVIDUAL PURPOSE STATEMENT

EDUCATION & PROFESSIONAL DEVELOPMENT

PROFESSIONAL EXPERIENCE

COMPANY (DATES)PROVENA MEDICAL CENTER: RN/BSN, LABOR & DELIVERY: 2003 – PRESENT
(write out the core competencies using the CDS instructions provided. Identify your key titles and roles below using an outline format).

ROLE
(describe competencies of the role here in sentence format)In this role, Malissa has become the recognized leader of both day and night shift crews by managing patient requirements and staffing volume. Drawing on her technical expertise she is widely recognized and endorsed by OBGYN doctors for her ability to take-charge and ensures patient safety and satisfaction in the most intense of situations. She regularly trains and provides coaching for new nurses within her unit. In this role, Malissa has contributed in the following manner:

- BULLET POINT OUT KEY ACHIEVEMENTS AND DELIVERABLES
- USE % WHEN YOU CAN
- DEMONSTRATE NOT WHAT YOU DID, BUT HOW MUCH IT HELPED THE COMPANY/CLIENTS

Role #2 (if applicable: repeat above)

COMPANY TWO (IF APPLICABLE REPEAT ABOVE)

AWARDS & RECOGNITIONS

TECHNICAL SKILLS & EXPERTISE

BASED ON MEASUREMENTS OF STANDARDS OF BSN/STAFF NURSING

- List out using bullet points
-
-
-

SOFT SKILLS & EFFECTIVENESS

BASED ON MEASUREMENTS BY IMPROVED EMPLOYEES AND SLA CERTIFICATION

(SJI, 2013; RAND & SRP, 2013)

- Same as above
- Use CDS/Improve Employee Soft-Skill Report
-
-
-

www.improvedemployees.com

PROFESSIONAL-SERVICE PORTRAIT

BASED ON MODERN RESUME STANDARDS (RAND, 2013)

Follow the instructions to complete this section. You will:

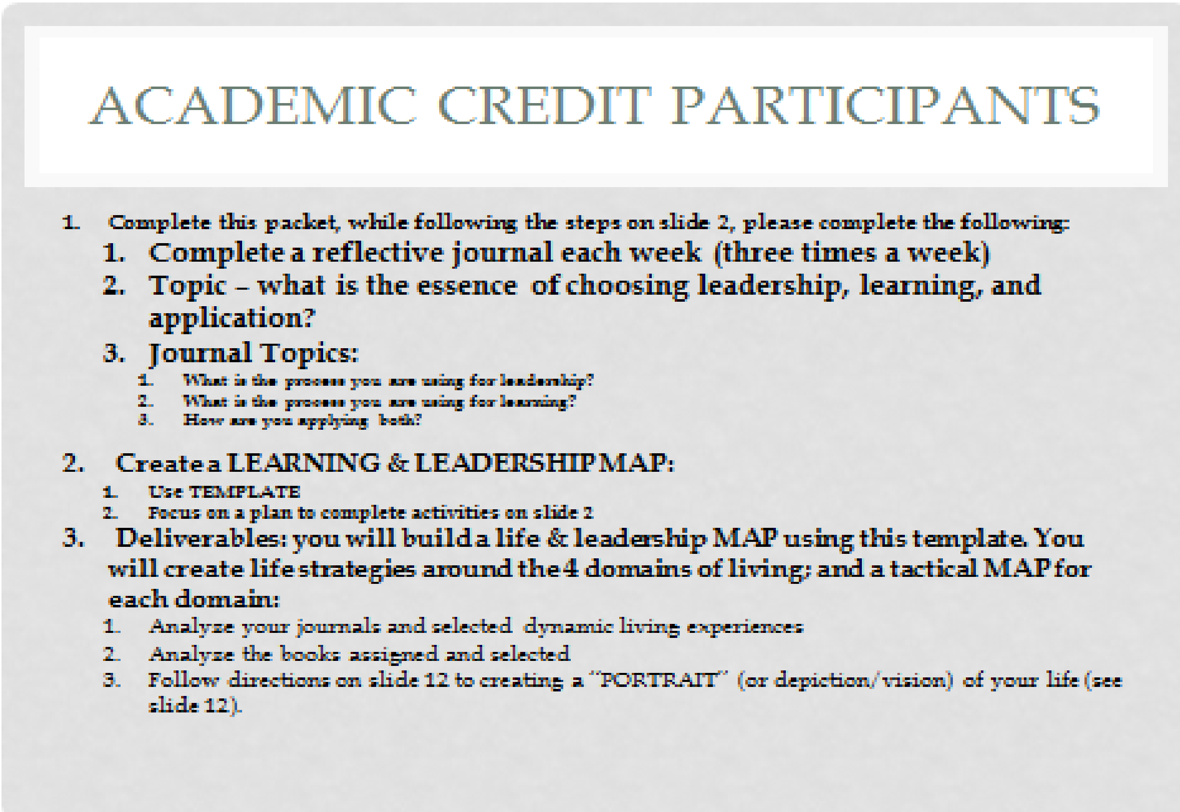
- Locate 3-5 job openings;
- Analyze them using SLG thinking tools (e.g., mind-mapping)
- Use 3-5 sentences directly from the job postings
- Create 3-5 paragraph creative visualized statement.

Your visualized statement should be written as though you have already been hired and training. It should use words from your resume and the job postings to depict how you will benefit the organization and their clients. You should reference technical and soft-skills as well as your purpose and values. Ideally, you will locate companies with similar missions and values to your own. Be creative; be positive; be energetic in who you are and what/how you will contribute to the company!

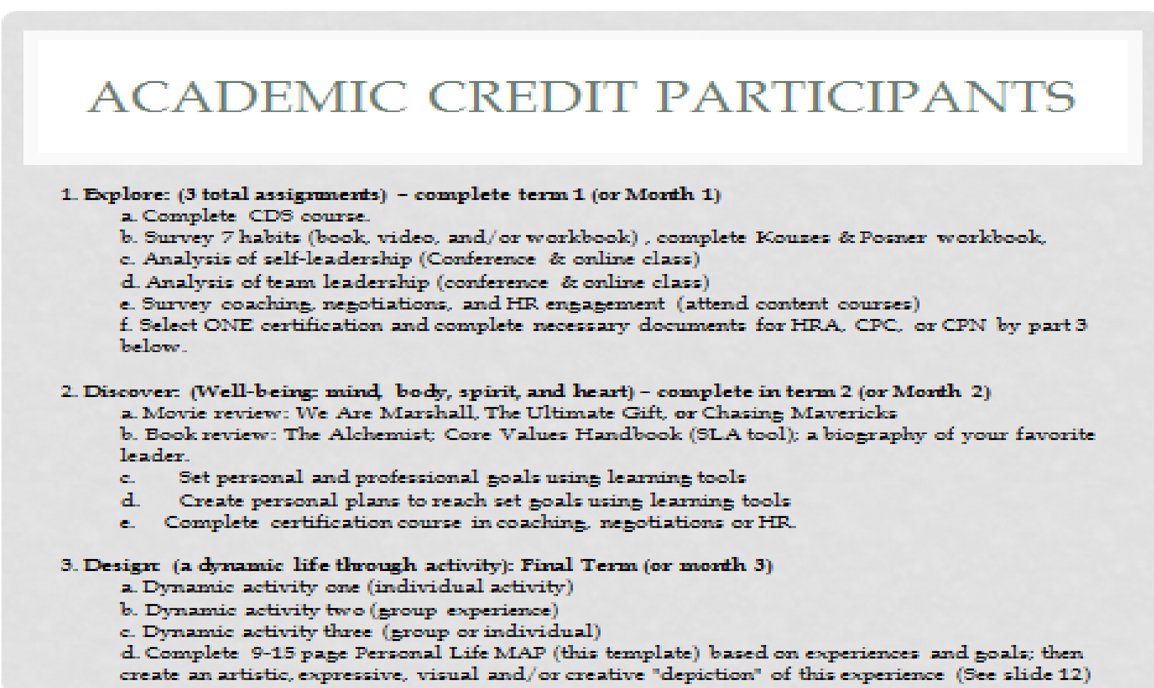
Finally, follow the instructions for creating a Life & Leadership MAP.

Cover Sheet:

Directions: Note that depending on the program provider approved by the SLA, these may change. The SLA may also direct formal final documents to focus on certain topics. These applied objectives are supplied from the SLA to your approved learning provider. However, in general the process includes:

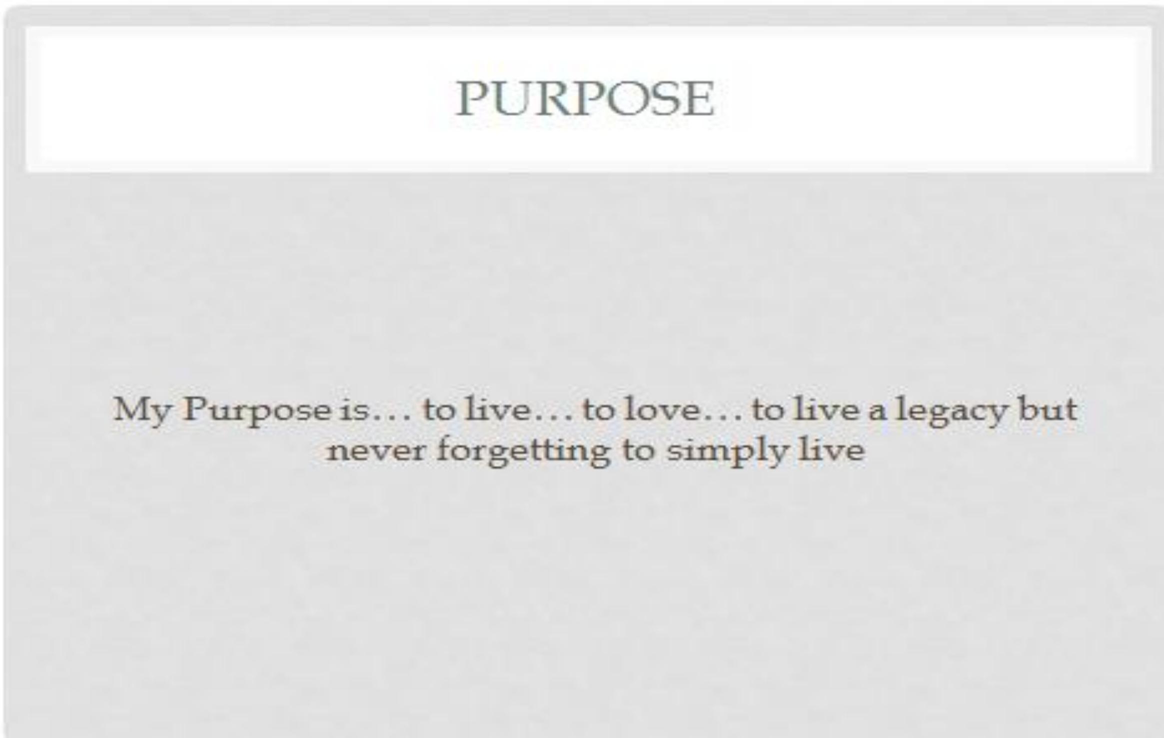


Note: participants seeking leadership certification who are not obtaining credits for learning may find a different set of directives.

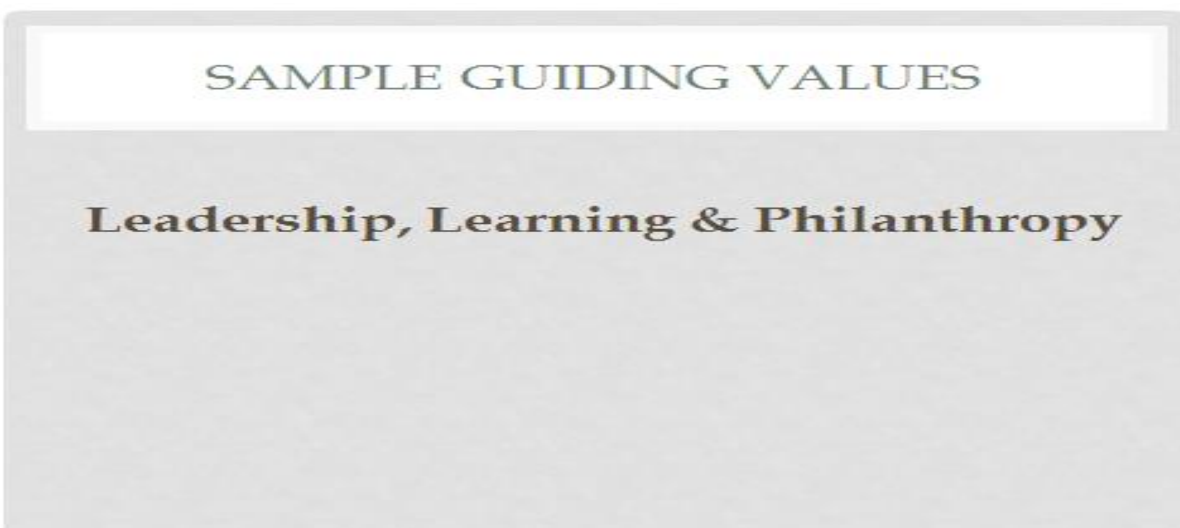


The Life & Leadership MAP combines: (cover slide, Table of Contents plus 6-9 slides)

Mission



Values



Strategic Life Goals

SAMPLE LIFE INITIATIVES

Mental: by 2020 I will earn a doctorate in psychology from an online institution and have it paid for through research internships through SLA

- In Jan 2015 I will meet with the guidance counselor at three schools;
- In June 2016, having studied three times a week I will have earned by SPHR and passed the GRE
- In Sept 2016 I will have secured 50% of tuition and leverage student loans to start the academic experience

Spiritual: by 2018 I will have a monthly webinar on learning spirituality through research of antiquities promoted by the SLA to their applied members and associate membership that results in securing a research contract to fund my doctoral studies in well-being.

Heart: I will find a girl, marry a girl, or just simply enjoy my friends by:

- Hosting monthly cigar parties
- Reflecting on my behavior toward others quarterly
- Keeping a journal each year where I write my Monday madness messages

Physical: I will maintain my desired BMI through a weekly workout routine so that in 2017 I will be eligible to be listed on the wall-of-fame at the gym:

-I will keep my cholesterol in ranges set by my doctor
-I will diet on protein
-I will lift three times a week for 45 minutes and walk 3 hours a week

Supporting Tactical goals

ELEMENTS OF WELL BEING

Vocational: over the next year I will be promoted to the position of Director of Research

- By earning my SPHR by 2015 I will be eligible for the promotion to manage the research division at the SLA
- I will start a preparation program by January 2015
- I will ensure my learning is balanced with my life mission, goals, and roles for balance.

Learning:

- I will enroll in a SRP SHRM certification program online
- I will attend three SAT Classes and devote hour daily to studies.

Physical:

- I will keep my walking to three hours during the next year
- I will keep my workouts to at least three times a week, but will allow necessary time for my learning schedule without reducing lifting to less than two sessions a week.

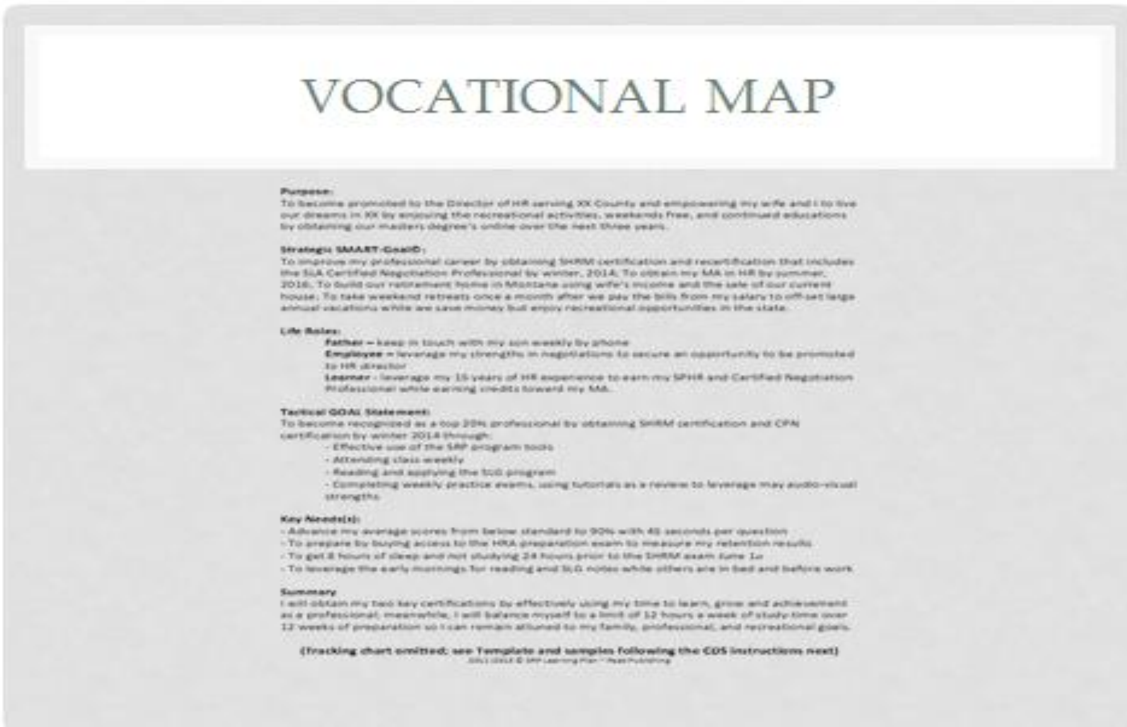
Social/Emotional:

- I will reduce my monthly cigar club to quarterly
- To keep a balance, I will build in a reading club with the cigar club so we have an all day hang-out to discuss the book read when my studies are complete.

Fiscal: By now you should get the drift. Be smart, Be clear, Be fair and strategic by linking your short-term and long-term realities into one MAP

Note: some elements may simply have one goal/initiative and do not require a comprehensive list of goals.

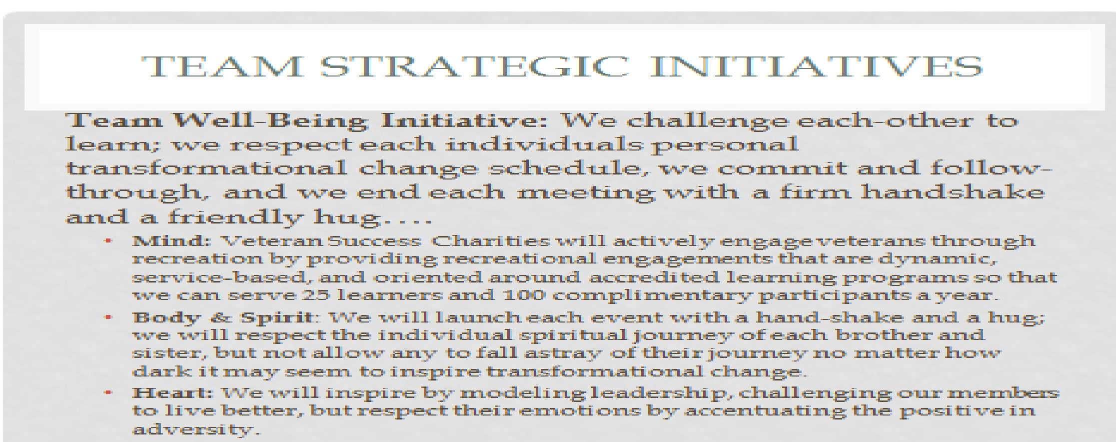
- **Supporting 1 sheet MAP per domain and element (appx. 8-12 total)**



Followed by the Dynamic-Depiction (Rand, 2014) of the essence of Life & Leadership learning and the dynamic living vision statement.

The team-centered Strategic MAP is built upon critical thinking by applying a process of understanding a problem; researching (analysis) solutions through purposeful learning methods; followed by creative-evaluation to build a team based on employee-centered fundamentals and team leadership.

The strategy, over-time, continues to evolve from the creation of tactical MAPs based on a defined strategy to the evolution of a full-scale strategy. Ultimately, the TEAM MAP serves then as a high-level strategic plan of anywhere from 12-25 pages depending on the size of the team. Ultimately, as ideas are created they are “spun off” into applied tactical projects, groups, or cohorts tasked to with pursuing their passionate interest in one specific team project by applying their learning. This is how the employee-centered model effectively maintains organizational hierarchy, structure, and adherence to the corporate direction, but inspires the drive-creativity proven to be more effective than performance management fundamentals.



VETERAN SUCCESS DIVISIONS

ORGANIZATIONAL STRATEGIC INITIATIVES

Strategic Initiative 1: Launch Sailing-4-Right to inspire veterans to explore, discover, and design well-being through our passion of the ocean resulting in a profitable wholly-owned and veteran operated non-profit organization securing $150,000 a year in operational revenue to fund three employees by 2015:

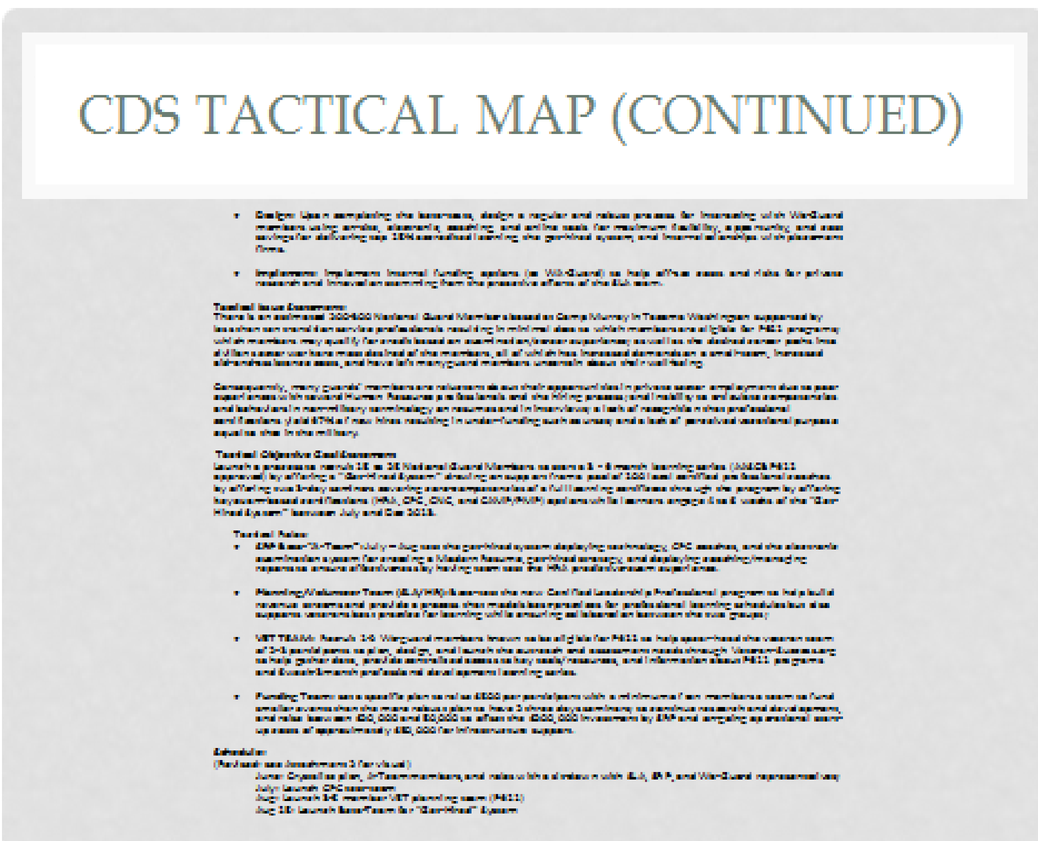
- Recruiting 5 participants to attend Veteran-Success programs through Seattle Pacific University using their COLA benefits they have earned and inspiring them to develop a strategic outreach program for teens and veterans through sailing by Jan 2012.
- Contact and organization the contribution of a wooden boat, the donation of a slip not to exceed $1500 a month in operational expenses so that we may engage veterans on the boat in dynamic recreation including:
  - Sailing
  - Scuba diving
  - Music
  - Photography
- Launch a process to obtain the necessary licenses to captain a boat by April 2012.
- Launch an outreach program to raise $8-12,000 to purchase three wooden boat kits that will be assembled and auctioned off at an annual event to raise $50,000 a year in operational capital by Jan 2013.

2011 ORGANIZATIONAL STRATEGIC INITIATIVES

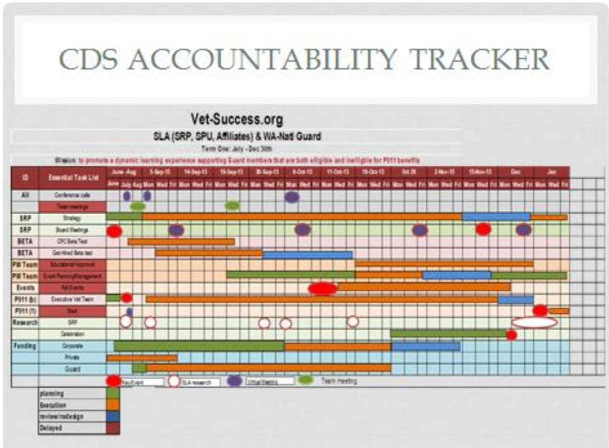
Strategic Initiative 3: Engage the Washington National Guard who are ineligible for veteran benefits by providing a holistic career-development program based on empirical research that unites veterans with civilian Human Resource Professionals in cooperation with the HRA Division of SLA:

- Establish a focus group to coordinate research based on findings from riding4right and sailing4right efforts.
- Conduct research and develop a learning system to empower 200 veterans a year through career development and coaching
- Secure an alliance to unite coaches, HR professionals, and veterans to help inspire and develop professional achievement through engagement, learning, and leadership.
- Recruit 5-10 veteran members to design, run, and own the Veteran-Success Get-Hired Charity Learning Program by FY 2014

CAREER DEVELOPMENT GROUP (2012/13 INITIATIVE)
Project:
WA-Nat'l Guard Outreach
Background:
The purpose of the outreach efforts by Seattle Research Partners (SRP) and PEAK-Publishing (PX) is to create experimental learning programs that are heavily applied and professional in nature for Seattle Pacific University (SPU). To this end, a three year endeavor has focused on creating a learning system that will evolve to provide more immediate transferable opportunity for veterans, improve veteran's success in program (Learning) completion, and link veterans with better opportunities for direct hire into civilian sector career paths. Recently, the non-profit credentialing arm (Strategic Learning Alliance; SLA) sent representatives to several employment outreach events through the VET-Connect program. This revealed several major gaps between the articulated and applied experiences of veterans and the understanding of human resource professionals conducting hiring (SRP is the largest provider of HR certification on the West Coast and in the top 1% nationally for HR certification with thousands of HR clients in Washington alone). The ensuing approach was to work with the National Guard to establish professional development programs eligible through Go-Army.edu. However, in February, 2013 this program was halted as a result of sequestering.
Building upon the expressed challenges faced by the leadership of transition services, an effort was launched to reposition these programs to be self-funded through recruitment of guard's members eligible for P911 benefits. Drawing from these shared resources, public and private financing, a large scale empirical research project was conducted between February 2013 and June 2013. This project has revealed grounded-theory for the best practices for ex-service members entering the workforce based on strengths and opportunities to translate skills from military service to civilian sector roles; ultimately, the theory has come to be known as the Get-Hired-System™.
This system builds upon best practices is supported with qualitative and quantitative approaches that have demonstrated the viability of: the Modern Resume©, a process for producing 8-fold increases above the traditional resume used by either recruiters (professional approach) or hiring managers (executive approach); it has validated the Improved Employee soft-skills assessment tool not only for articulation of key behaviors (using civilian sector language produced in less than ten minutes to help vets articulate their behaviors with 94.8% accuracy) but produces recommended strategies for coaching, managing, and training individuals based on their immediate tactical strengths and personality.
Finally, the system has also generated an understanding for the best methods for veterans including: clarifying and seeking purpose in vocation, alignment of key certifications to enhance resume's, methods for quick and perceived effective learning, coaching to completion/management to completion needs, and top career-boards, networking, and volunteering strategies to deploy to ensure results.
Strategic SMART-Goal©:
Over the next 36 months continue to hone research for the development of the AASCB approved (top 15% learning institution accreditation) program that builds on the theory of "see-do-get" learning and service-immersion experience to build a military-focused learning system supporting 50-100 National Guards members a year on P911 benefits, while allocating shared resources to help an additional 50-200 a year through vocational-focuses coursework that leverages researched findings to better link Guard Members to civilian sector jobs using a 3 to 9 month learning approach.
Explore: Continue to conduct environmental scans to determine the electronic, coaching, and duplication needs for building a regional learning program supporting tactical training and learning for the get-hired system as well as conducting additional research to enhance and build a learning institute relying on P911 participants seeking advanced certificates and credits toward an 18month MA (or undergraduate credit).
Discover: Continue to enhance the ideal model of learning supporting a "see-do-get" and "service-immersion experience" by conducting action-research, promoting key PR events linking HR and veterans through regular engagement opposed to passive one-shot hiring events.



CDS TACTICAL MAP (CONTINUED)



From the organizational perspective, the team MAP allows groups to form; unite around shared inspiration and provided the autonomy, mastery, and purpose (MAP) to link their creative-solution, applied learning, and CHOICE-based leadership skills to help advance the organization (see Pink, 2010). In this process, you will notice that the template mirrors the individual MAP but de-emphasizes (but DOES NOT Eliminate!!) the well-being components. Instead, it establishes purposeful boundaries and values to govern team performance, behavior, and is built around statistically validated team-effectiveness (culture) reports.

Summary

Organizational Development as a business system summary

The key to organizational development is to focus on the long-term and short-term company needs. To do so confidently requires: *attunement, buoyancy, and consistency* (Pink; 2013). Effectiveness, therefore, is a consistent process within every system to ensure the proper holistic relationships are working together. Organizational development, therefore, is a process for company, team, and individual improvement and awareness. It is a process that must be deployed in long-term and short-term situations with regards to both internal and external forces influencing the entire system.

Return to the concepts of the Strategic Learning & Leadership Guide presented earlier. Take a moment to contemplate the various systems that you see in your work-place. Brainstorm by using a mind-map to examine the tasks, roles, and processed, procedures, systems, in all domains and elements within a company. Then deploy the relationship-diagramming to create consistent systems that encompass roles and tasks (these processes are defined step-by-step and templates follow this section to help ensure you maximize performance, experience, and learning through Professionalism: Effectively Applied Knowledge (PEAK)™ outcomes. By doing this you should evaluate the well-being development

FRAMEWORK (not *plan*, that is design and neither exploration nor discovery phases). This framework should simultaneously improve the SWOT of a company as well as the SWOT of an individual in the many complex, ambiguous, but inter-related components that must be taken into consideration before a specific *plan* can be designed.

The simple clarity for organizational development, and individual development, is to remember that the role of the leader is to help the individual understand, analyze, and evaluate internal and external influences on both short-term and long-term behaviors, needs, elements, and domains of well-being by compassionately coaching the individual (or team) toward desired achievements by using tools to ensure benchmarked achievement occurs. Hundreds of papers have been written and researched on very minute components of these systems; but, this section highlights the key components (see Rand, 2010; Rand, 2012).

Therefore, remember the role of the coach, leader, negotiator, human resource professional, operations manager, spouse, or even friend is to help an others find simple clarity in pursuit of their passion. In order for that person to recognize their passion and purposefully pursue their passion, leaders foster learning by using regular, consistent, buoyant, and attuned processes and tools (Rand & Mashuta, 2012; Rand & SRP, 2013). Great leaders avoid reacting quickly and without assessing, planning, and crafting creative solutions to short-term "shooting stars" that might distract them from their best and highest contribution to themselves and others they interact with in life.

Professionalism: Effectively Applied Knowledge (PEAK)™ leadership cultivates individual-centric systems.

Section Six:

Analysis & Review

PURPOSEFUL COACHING & NEGOTIATIONS

AN APPLIED WORKBOOK

Dr. Paul Rand MBA, Dr. Jim Rand, SPHR, CPN, CPT, & Barbara Wainwright

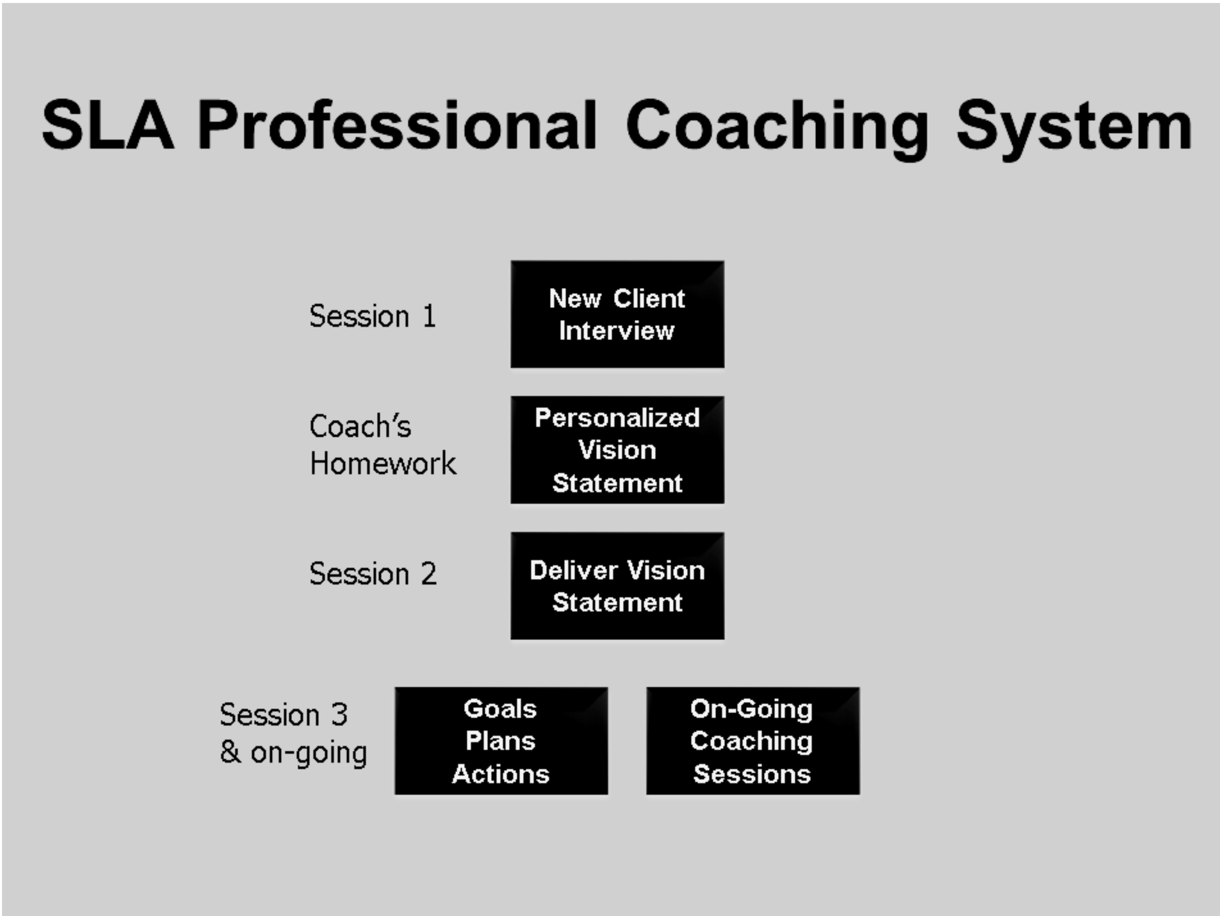
SLA Professional Coach Code of Ethics

Know yourself; Know your client; Quality; Learning; Service

As a Strategic Learning Alliance Certified Professional, I will:

- Maintain a professional relationship with peers.
- Always keep my clients' interests above those of my own.
- Maintain, guard and guarantee my clients' confidentially.
- Not offer advice, counseling, or psychotherapy to any client in my duties as a coach.
- Never do harm to any client.
- Develop lasting relationships built on a foundation of honesty, integrity and respect with every client I serve.
- Commit all of my professional experience, energy and focus to helping every client I serve.
- Expect success from every client I serve, and I will not be limited in my expectations by my clients' past performances.
- Encourage my clients to believe in themselves, set realistic goals, take appropriate actions and celebrate success.
- Provide my clients with a safe and nurturing coaching experience which will allow them to be themselves without fear of judgment, criticism or failure.
- Remain committed to professional excellence in all that I do and all I provide.

SLA Professional Coaching System



We teach a system of coaching so that you can coach in any area or niche that you are drawn to professionally. Using a Professionalism: Effectively Applied Knowledge (PEAK)™ system from applied learning ensures 100% customization bounded on a three-step system. As a coach, you will help people to achieve personal success through providing accountability and structure for their dreams and goals. People thrive with the unwavering support from a coach who is committed to their success.

Certified Professional Coaches have the privilege and responsibility of empowering, mentoring, encouraging and motivating their clients to identify goals and objectives, develop plans, and continue on their path toward self-improvement, balance and achievement. By leveraging coaching, research shows us that we compel people to look within not for the purpose of healing, but for the attainment of profound forward-looking achievements (Rand & SLA, 2014).

A successful coaching experience creates sustainable results, during the coaching process, and for years to come. With SLA's Professional Coaching System, you will assist your clients in identifying and clarifying their individual goals and desires enabling them to create a plan and take action to achieve their objectives. The progress of clients will be measured as their goals and objectives are achieved.

SLA certified professional coaches:

- Recognize common neuro-linguistic meta-models and meta-programming patterns and Socratic questioning to enhance communication in the coaching process.
- Recognize and model the style of communication used by individual clients to easily establish rapport.
- Recognize and understand underlying belief systems that affect the decision making processes of individuals.
- Develop the rapport required to challenge limiting beliefs and empower clients to expand their paradigms.
- Easily communicate with and assist clients to articulate their goals and objectives as they encourage them to define a work and life balance.
- Understand and use attentive listening skills and learning tools
- Develop and deliver a powerful personalized vision statement for your clients.
- Provide measurable results for your clients using a MAP

What makes a great coach?

What are some of the characteristics that make someone a great professional coach? (model answers are on the next page)

- Good listener
- Compassionate and caring
- Asks contemplative questions
- Nurturing
- Able to motivate and inspire
- High Ethical Standards and Behavior

What are the goals of a professional coach?

- To clearly understand their client's motivation, vision, needs, and objectives
- To help clients to develop the plans to move quickly and easily toward their goals
- To provide support to ensure clients are nurtured and motivated to achieve their goals.
- To provide accountability and measurable results
- To celebrate with their clients when they achieve success

A great coach will stand by their client to ensure they are nurtured and motivated to achieve their goals.

SLA Professional Coaching Process

To Be a Great Coach,

You Don't Need the Answers.

You Do Need the Questions.

The basic premise of coaching is that our clients have all the answers within them. That's right! THEY have all the answers within. Therefore, our job as coaches is to help them to discover those answers. Our job is to ask great questions; the ***RIGHT,*** **PROFOUND** and **PURPOSEFUL** questions to help our clients bring forth their personal strengths and goals. You will ask questions to help your clients to prioritize and clearly articulate their desires. You will ask questions to help them to stay accountable to their objectives.

Successful coaching is about:

- Asking the right questions
- Empowering your clients decide for themselves, what their goals are and how they can achieve them
- Listening and understanding and helping your clients to prioritize
- Helping them to clearly articulate their desires and stay accountable to their objectives.

Great coaches are:

- Purposefully Passionate
- Objective in their questioning,
- Applied Learners
- Disciplina-focused

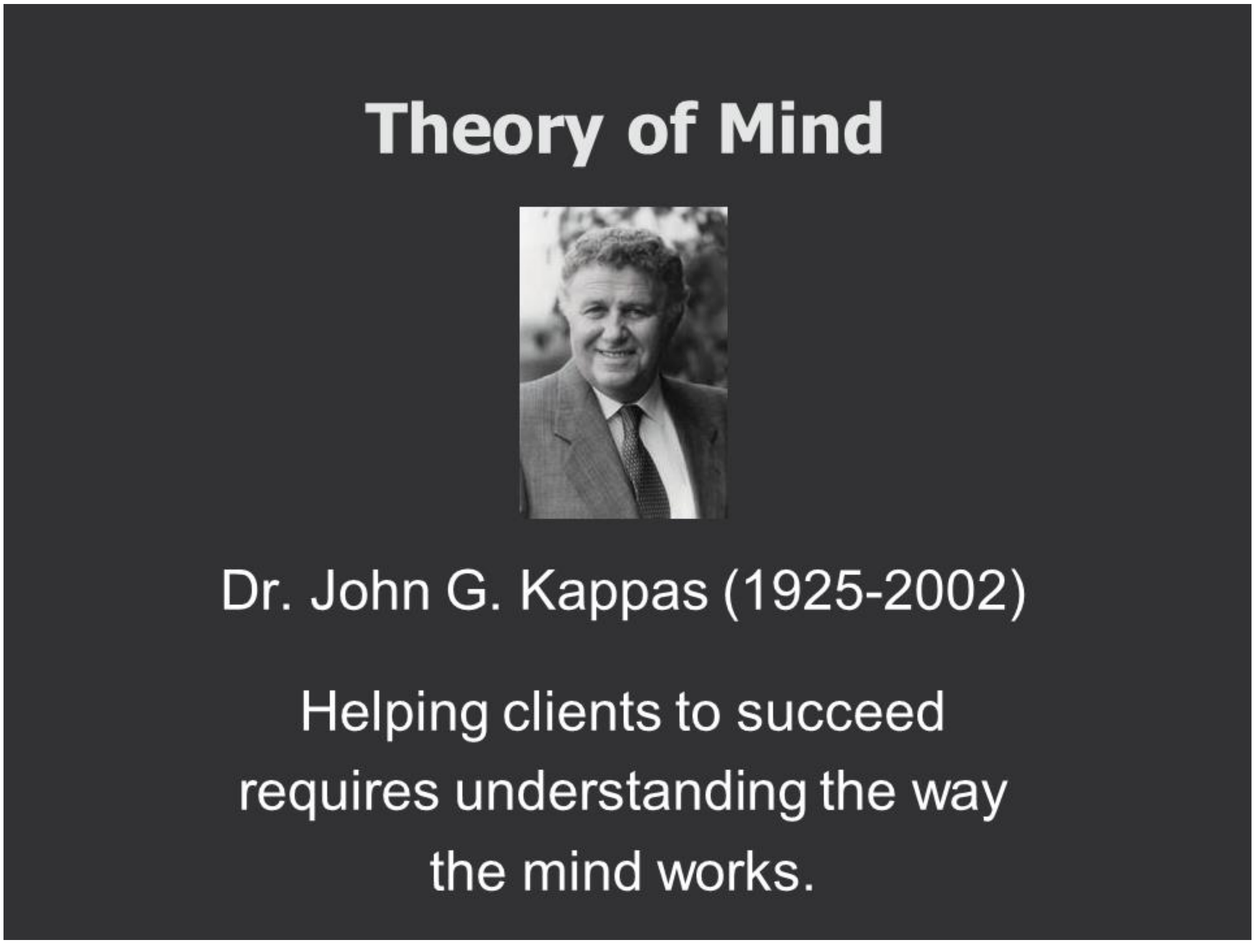
Great coaches help their clients in many ways. The focus is on understanding first (see Covey, 1991; see also Rand, Rand, & Rand, 2011; Rand, 2014). This requires asking questions to help others clearly identify and articulate their goals and desires. Research demonstrates the average person sets and effective SMART goal less than 15% of the time; when working with a certified coach this increases to over 85% accuracy (Rand & SRP, 2013).

Coaches act as leaders by helping clients learn to strategically analyze their opportunities, strengths, and develop methods to choose to overcome barriers by seeing the opportunity present in every challenge. Unfortunately, the average professional will rate a barrier as impassible upwards of 60% of the time, resulting in disengagement from the situation or workplace (see Gallup, 2013; see Pink, 2012). However, coaches help clients unlock their knowledge and identify applied methods to choosing a positive and purposeful forward-direction. Therefore, professionals using coaching:

- Identify and eliminate limiting beliefs
- Be accountable to their dreams
- Step outside of their comfort zones to achieve their goals.

In the Space Below Apply Mind-Mapping to the Content you are learning:

The Theory of Mind with Dr. John Kappas



We know that helping our clients to succeed requires understanding the way their mind works. Dr. John G. Kappas (1987), theorized that the mind develops in 3 stages:

From his book Professional Hypnotism Manual, he discusses the following:

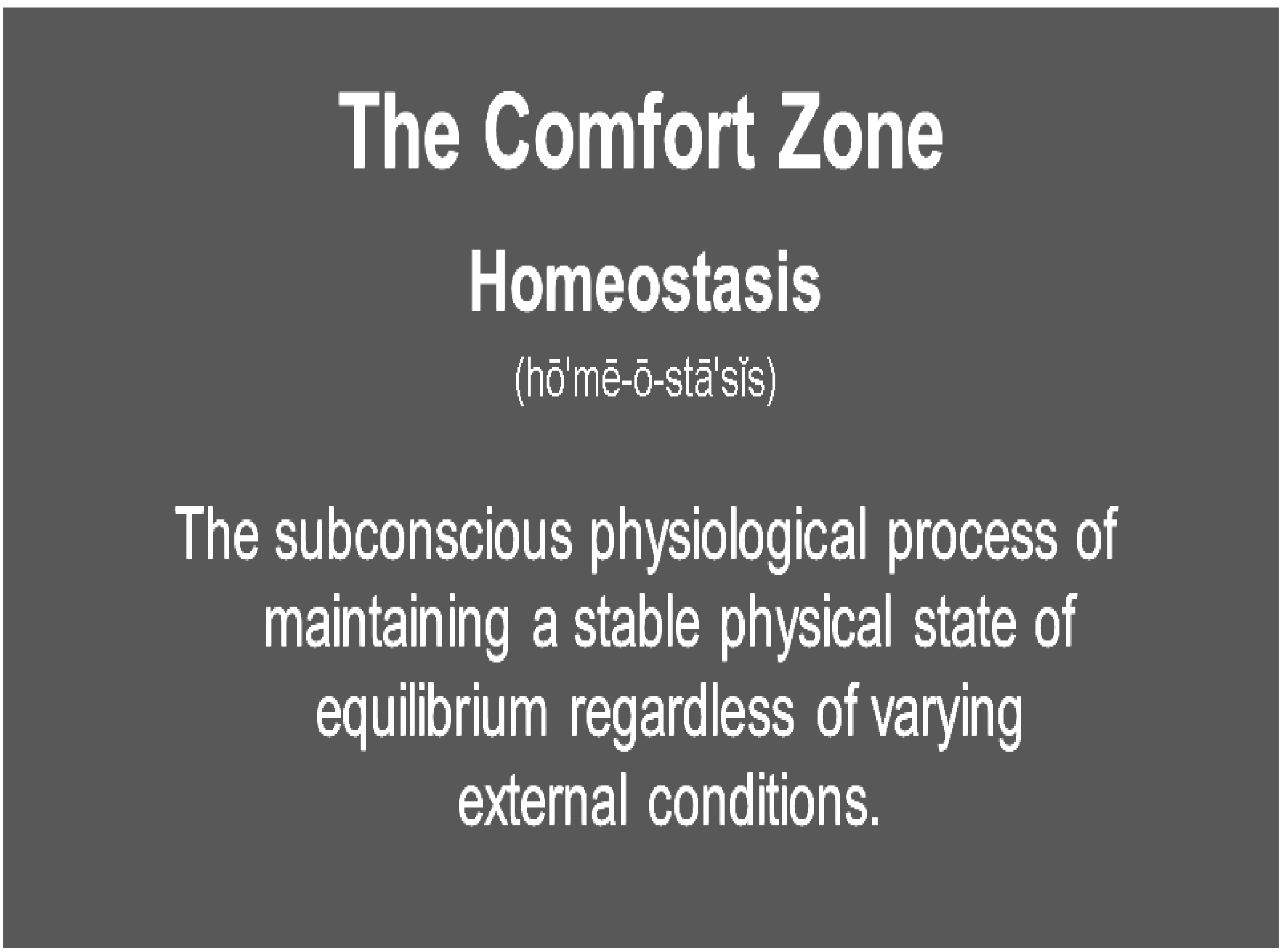
> From age zero to approximately age eight, the child develops a library of associations and identifications. She/he learns that some of these are good (positive) and some of these are bad (negative). The positive and negative associations form what is referred to as our 'life script'.
>
> Between the ages of eight to twelve (approximately), we start to develop logic and reason. We are capable of making decisions and developing our power. This becomes our conscious mind, which represents 12% of our total mind power. The subconscious mind is made up of the remaining 88% of our total mind power.
>
> Further Dr. Kappas writes, "The critical area of the mind separates these two areas and protects us from unknowns. It acts as a filter between the conscious and

subconscious. If it were not for this filtering mechanism, we would have no protection from the vast number of message units coming into our mind."

To summarize:

- Stage 1 is from ages 0 – 8. During this stage, we develop our library of associations and identifications. We accept everything as normal and our comfort zone is created.
- Stage 2 is from ages 8 – 13. During stage 2, we develop our reasoning and our critical conscious mind.
- Stage 3 is from ages 13 and on. In stage 3, we already have our critical conscious mind set. We have an innate drive (homeostasis) to remain in our comfort zone.

Homeostasis - (hō'mē-ō-stā'sĭs)



Homeostasis is the subconscious physiological process of maintaining a stable physical state of equilibrium regardless of varying external conditions.

Homeostasis is the ability to regulate internal conditions, such as the chemical composition of body fluids, so as to maintain health and functioning, when conditions deviate from their optimal state. Just like our continuous breathing is subconscious, so is homeostasis. We don't consciously take each breath, nor do we consciously realize that we are pulled back into our comfort zones. It happens at a survival level, just like breathing. It's subtle and happens instinctually – totally unconscious.

Just before stepping onto a stage to give a speech, (one of the top 3 most stressful things to do), a person may notice physical changes. They may notice things like: their palms are sweaty, their mouth is dry, their stomach is doing summersaults, and their heart rate has increased.

What is happening here?

The subconscious mind is activating hormones and chemicals to prepare the body for fight or flight response to the stress created by stepping out of one's comfort zone as they step onto the stage.

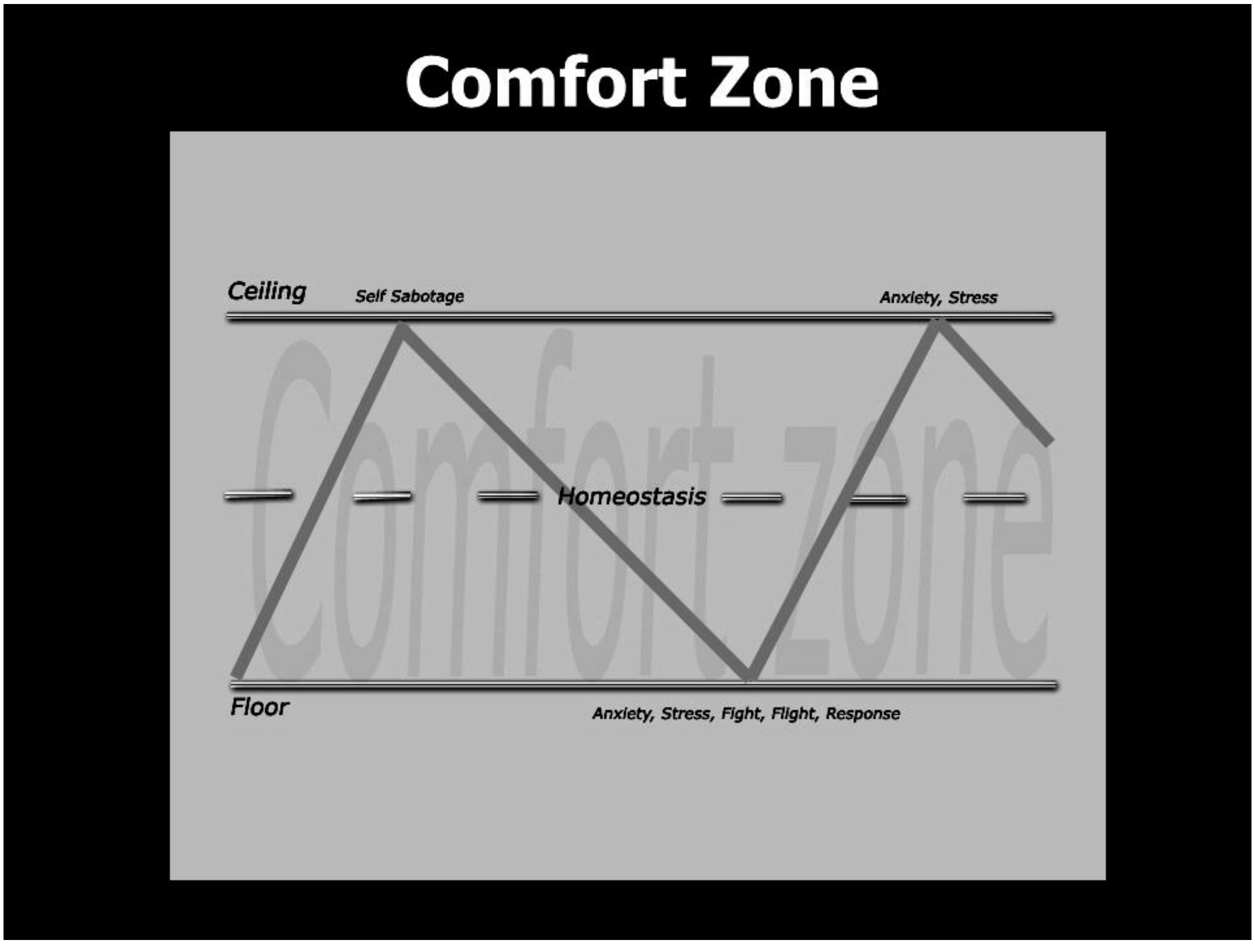
How does this apply to coaching?

When it comes to our clients goals, they CONSCIOUSLY realize that they want to change (lose weight etc.) but SUBCONSCIOUSLY their homeostasis will PULL them back to their comfort zone. Yet, science teaches us that coaches can help individuals consciously choose to be proactive and set forward-looking goals to attain better than expected results. This is known as *disciplina*-focus (see Rand, 2014; see also Lawlis, 2009).

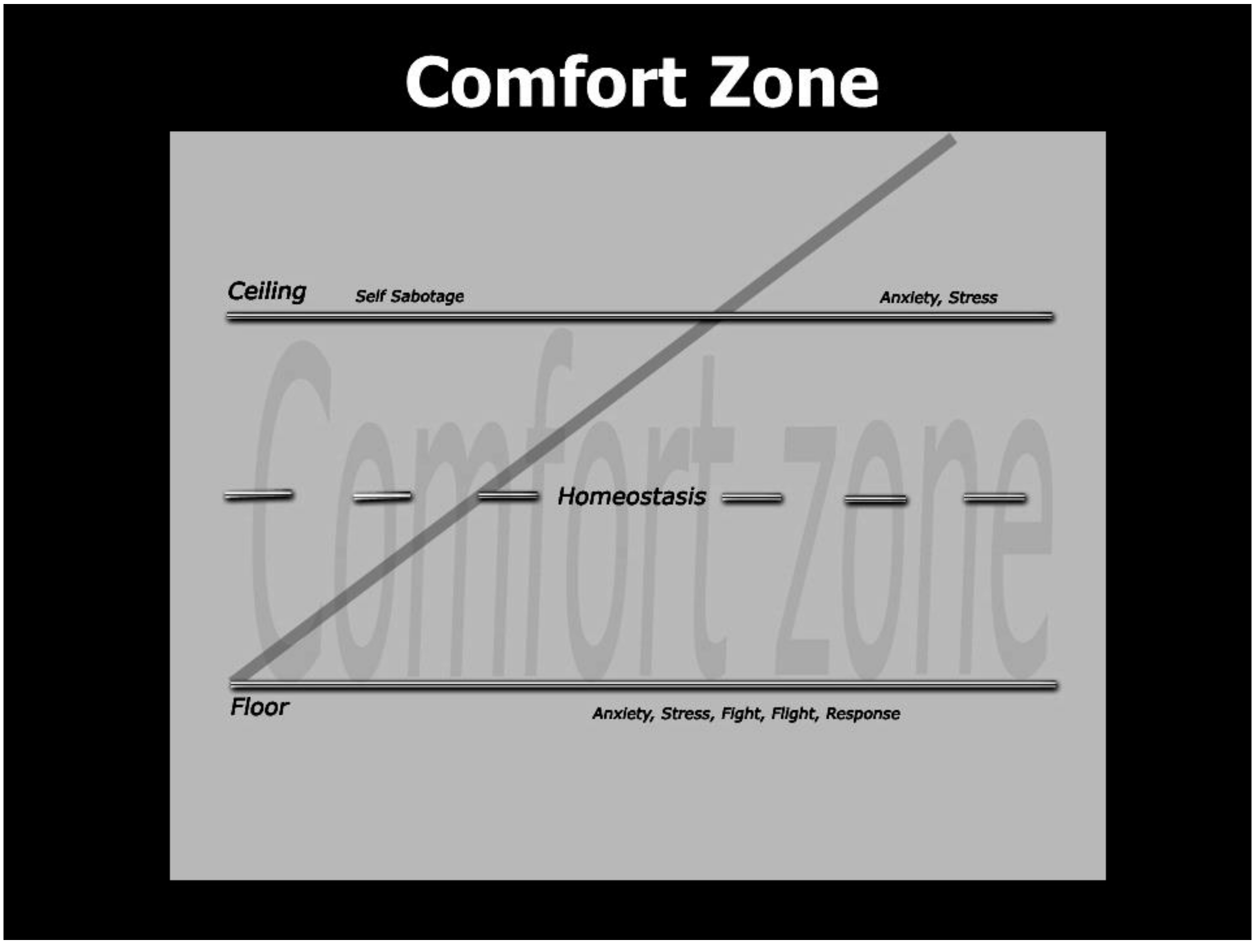
We are SUBCONSCIOUSLY programmed to eliminate STRESS so that our physical bodies don't expire (heart attack, cancer etc.), just like we are SUBCONSCIOUSLY programmed to perspire so that our bodies don't overheat.

In order for our clients to change/grow, they need to eliminate/manage the subconscious stress associated with change. Let's look at how we can help our clients with that.

The Comfort Zone



We subconsciously bounce between the floor and the ceiling of our comfort zone. When the anxiety gets too great, we are subconsciously pulled back right into our comfort zone.



When we help our clients to “reprogram” their subconscious mind to accept change as though it has already occurred, one is no longer subconsciously pulled back and is free to soar into their success. “Reprogramming the subconscious mind” may be a bit abstract for some. Another way to say this is: we help our client to create new neural pathways in their brain (see Lawlis, 2009). In turn, these new neural pathways assist our clients to think outside of their limited paradigm (belief system or comfort zone) and choose a more excellent, integrative mindset for future success.

Conscious vs. Subconscious

The late Maxwell Maltz, M.D. (1960), was and American plastic (cosmetic) surgeon and he wrote a (now classic) book called, *Psycho-Cybernetics.* He wrote this book when he noticed that changing a person's physical appearance didn't necessarily increase his/her self-esteem. He also noticed that some of his patients seemed like completely different people (in a positive way) after surgery.

From his observations, Dr. Maltz (1960) hypothesized this view; "A person must have an accurate and positive view of himself or herself before setting goals, otherwise he or she will get stuck in a continuing pattern of limiting beliefs."

Has anyone you know ever been stuck in a pattern of self-defeating or limiting behavior?

Can you see the connection of how they could definitely benefit by working with a coach?

How does this relate to Learning & Leadership?

Dr. Maxwell Maltz, MD. (1960), stated:

> Change occurs not by intellect, and not by intelligence; change is brought about by experience. Remember, experiencing is the same to the subconscious mind as imagining. The subconscious mind does not know the difference between real and unreal. It accepts what you feed it.

In other words, you will have a subconscious physical reaction to an imagined experience. You can't help it. For instance, while watching a frightening movie, your heart will pound. You can't help it…. or can you?

This will help you to realize that your client, as they reach for an unfamiliar goal, can't help but be pulled back into their comfort zone. What's the solution? When we help them to reprogram their LEVEL of COMFORT to BE the new end result, they will no longer have the self-sabotage that so frequently stifles change (Rand & SLA, 2012). By infusing learning activities; science; and a forward-looking paradigm that a person consciously sets – not is advised, counseled, or therapeutically healed (this is the important role of a therapist or counselor, and not a coach!)

Here's the key to change: Reprogram your subconscious mind to ACCEPT your dreams as REAL. Doing so, changes your body's physiological reaction to new experiences. Changing the physiological reaction eliminates the "flight or fight" response and the PULL BACK to the comfort zone. In fact, reprogramming the subconscious mind gives your client a NEW COMFORT ZONE, one that is in alignment with their dreams and goals. Just like the speaker who becomes comfortable in front of an audience no longer experiences the sweat, butterflies etc., your client will be freed from the self-sabotage, anxiety and stress of change.

Neuro-Linguistic Programming (NLP)

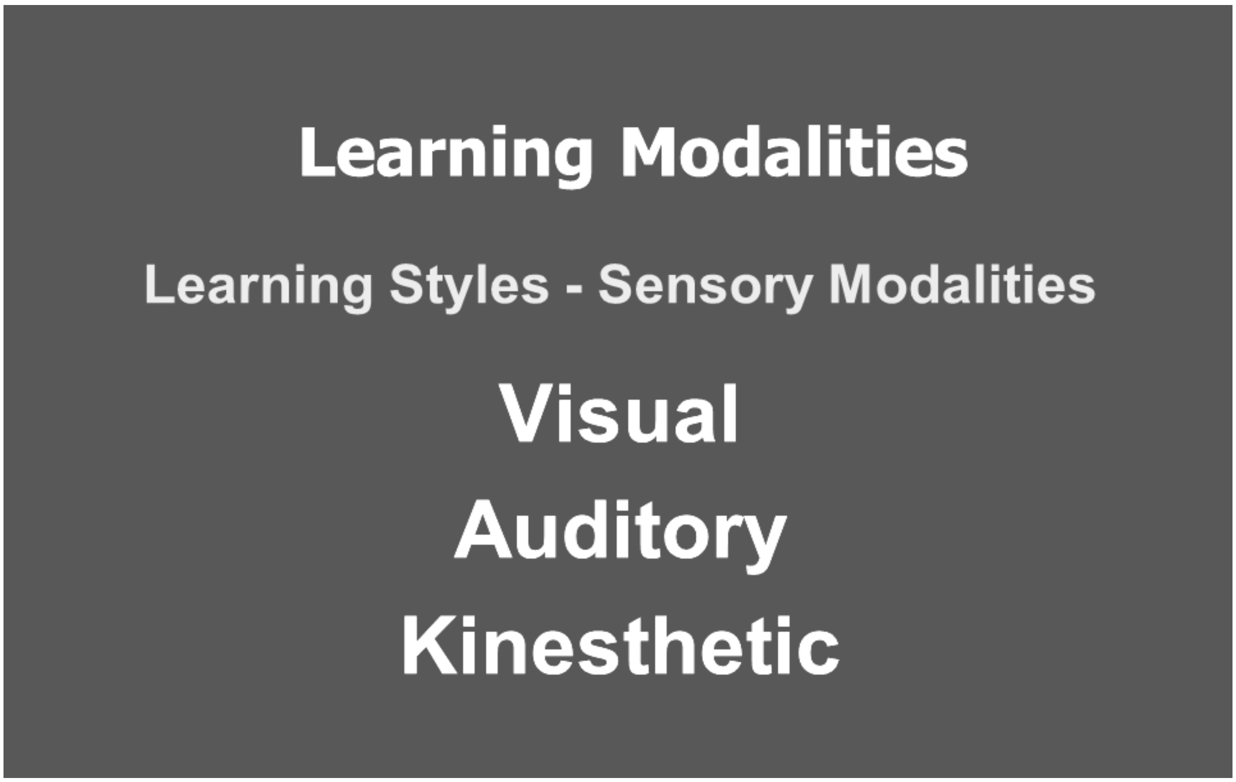
NLP has created the context to understanding how people think, process information, and make decisions. There are many reasons that NLP will help you be a great coach:

- NLP will help you to develop instant rapport with your client
- You will have the tools to create a powerful vision statement for your client
- NLP can be used to identify and eliminate negative states, habits or beliefs that are holding your client back.
- NLP can be used to help your client get into a positive state so that they can be their best at all times.

NLP has literally hundreds of applications and theories. For our purposes we will only discuss the most appropriate NLP strategies for coaching, programming and helping our clients to achieve their goals! With NLP you will understand the underlying cause and language of limiting beliefs: distortions, deletion, generalizations. You will learn how to recognize these limiting beliefs and challenge them using Socratic questioning. This is a very powerful way to get positive results for your client.

It's human nature for us to have beliefs that limit our success. Taking an objective look at these stumbling blocks and understanding what may limit our confidence in being successful is another key element in our coaching system. NLP was developed in the 1970's by John Grinder, a linguistic professor and Richard Bandler, a mathematician at the University of California Santa Cruz. You can learn a lot about NLP from their book "From Frogs to Princes".

NLP Learning Modalities: Visual, Auditory, Kinesthetic



People communicate in 1 of 3 ways or a combination of the 3: visual, auditory and kinesthetic. Using NLP tools and techniques will help you to easily identify your client's primary sensory modality which in turn, will help you to provide your client with a successful coaching experience. Typically, people use all three modalities, but there is usually a predominant one and our modalities may change by context. For instance, someone may be visual at work and kinesthetic at home.

Apply Blooms Model: How does this relate to learning to learn?

Primary Learning Modalities

Primary Learning Modalities

Visual	Auditory	Kinesthetic
See	Sound	Feel
Observe	Rings a bell	Grip
Mind’s eye	Hear	Handle
Imagine	Listen	Touch
Look	Articulate	Calm
Show	Discuss	Stress
Notice	Loud and Clear	Hang in there

The above lists are predicates in language (verbs, adverbs, and adjectives) that have specific representational systems. A way of detecting the primary (most commonly used) representational system a person has in consciousness is by listening to their language, the sentences generated, and noticing the predicates used. Other sensory modes are: olfactory and gustatory (smell & taste respectively).

Why is this important as a coach?

You will be able to develop instant rapport with your client, which of course, is how you will get clients! Becoming aware of your client’s primary modality gives you the pathway to communication that your client will feel comfortable with.

Secondly, you will also know the words to use in your client’s vision statement. The vision statement must seem, feel or sound, natural to your client. When you use words that are from their primary modality, the vision statement will be received as natural by the “critical conscious mind” of the client.

NLP Learning Modality Indicators You Can See

Modality Indicators

	Visual	Auditory	Kinesthetic
EYES	Look up to their left or right. May appear unfocused.	Level left and right, down to the left. May appear shifty.	Down and to the right. Look down a lot.
GESTURES	Are quick and angular, include pointing.	Rhythmic, touching ones face, (i.e., rubbing the chin), ears, mouth.	Rhythmic, touching the chest, in close.

These learning modality indicators can be used to identify your client's primary modality when you are working with them in person.

- People that are primarily visual learners/communicators will make a lot of hand movements while they quickly talk. They will look up as they recall and describe the picture that represents the words they are sharing with you.

- A primarily auditory learner/communicator may touch their chin, ear or face, as they speak the words they hear. Their eyes may shift from side-to-side as they recall information.

- A kinesthetic learner/communicator will seem very contemplative when they talk. They will look down as they convert their sensitivity and feelings into words. They may place the palm of their hand right over their heart while they are speaking.

NLP Learning Modality Indicators
You Can Hear

Modality Indicators

	Visual	Auditory	Kinesthetic
Breathing and Speech	Breathes high, shallow and quick. Speaks quickly, staccato	Breathes from the mid-chest. Speaks rhythmically	Breathes deep, slow, with pauses. Speaks slowly, with pauses.
Words	See, look, imagine, reveal, perspective	Hear, listen, ask, tell, click	Feel, touch, grasp, catch-on, contact
Presentation Preferences	Pictures, diagrams, movies, graphs, data, eye candy	Lists, summaries, quotes, reading	Games, movements, manipulative exercises.

Determining your client's primary modality can be done over the phone by listening to your client's language, breathing and speech patterns.

If your client is speaking quickly, see if you can match that pattern. If you are kinesthetic, you may really need to pick up the pace. To acknowledge you heard them, you can say things like: "I see what you are saying." "I have a clear picture in my mind's eye now." "I understand your perspective." "I can imagine."

If your client is speaking rhythmically, see if you can follow the rhythm with your voice. To acknowledge you understand them, say things like: "I hear you" "That clicked with me." "That rings a bell."

If your client is kinesthetic, they will be speaking slowly. Give them ample time to complete their thought. It may take a kinesthetic a little longer to convert their feelings into words that can be spoken. To let them know you understand them, say things like: "I feel you." "I connect with that." "I grasp what you are saying."

Notice the last row of information is "Preferences". These are the different ways visual, auditory and kinesthetic people like to receive and process their information.

Developing Rapport with NLP Mirroring and Matching

Mirroring and matching your client's primary modality is really important. First of all, it will help you establish rapport; they will feel comfortable with you, which is important for the coaching relationship to work. Secondly, a kinesthetic will drive a visual crazy. So, if you are kinesthetic and your client is visual, you are going to need to pick up the pace of your speaking. And, vice versa, if you are visual and your client is kinesthetic, you will need to SLOW DOWN your speech because a visual talker "feels like" a freight train barreling down the tracks aimed right at the kinesthetic, and instantly creates a sense of overwhelm for them.

Mirroring and Matching is the KEY to helping your client to be comfortable with you as a coach. You will want to mirror and match your client's gestures, words, speech patterns and their breathing. Think about these skills for a moment. Yes, they are great tools for coaches to use to better understand their clients, and how about all the other people that you communicate with in your life right now. These skills and tools are great assets that can be used in every area of your life, for the rest of your life.

Remember, you are responsible for your communication with others. If someone doesn't understand you, it is your job to first understand the primary communication modality of the person with whom you are trying to communicate.

And second, adapt to a modality that is appropriate for that person. This takes practice. The great thing is that you can do it every day in all your interactions with others. Before long, you will become a master of communications.

Why Personal Prose?

Learning your client’s personal prose and using it to motivate your client will make your client feel heard and empowered. Using your client’s “feel good” language (personal prose) in their vision statement is a KEY to acceptance of the vision as real. Once the vision is accepted as real by the subconscious mind, your client will naturally and easily move out of their comfort zone toward their dreams and goals.

What I Know About:	List (bullet points not long narrative)
Foundations of coaching	
Key Learning Points	
How Have I Encountered this Topic in life?	
How do I see myself applying this learning?	

How will I monitor my mastery of NPL?	
Set a Goal for Applied Learning of NPL	

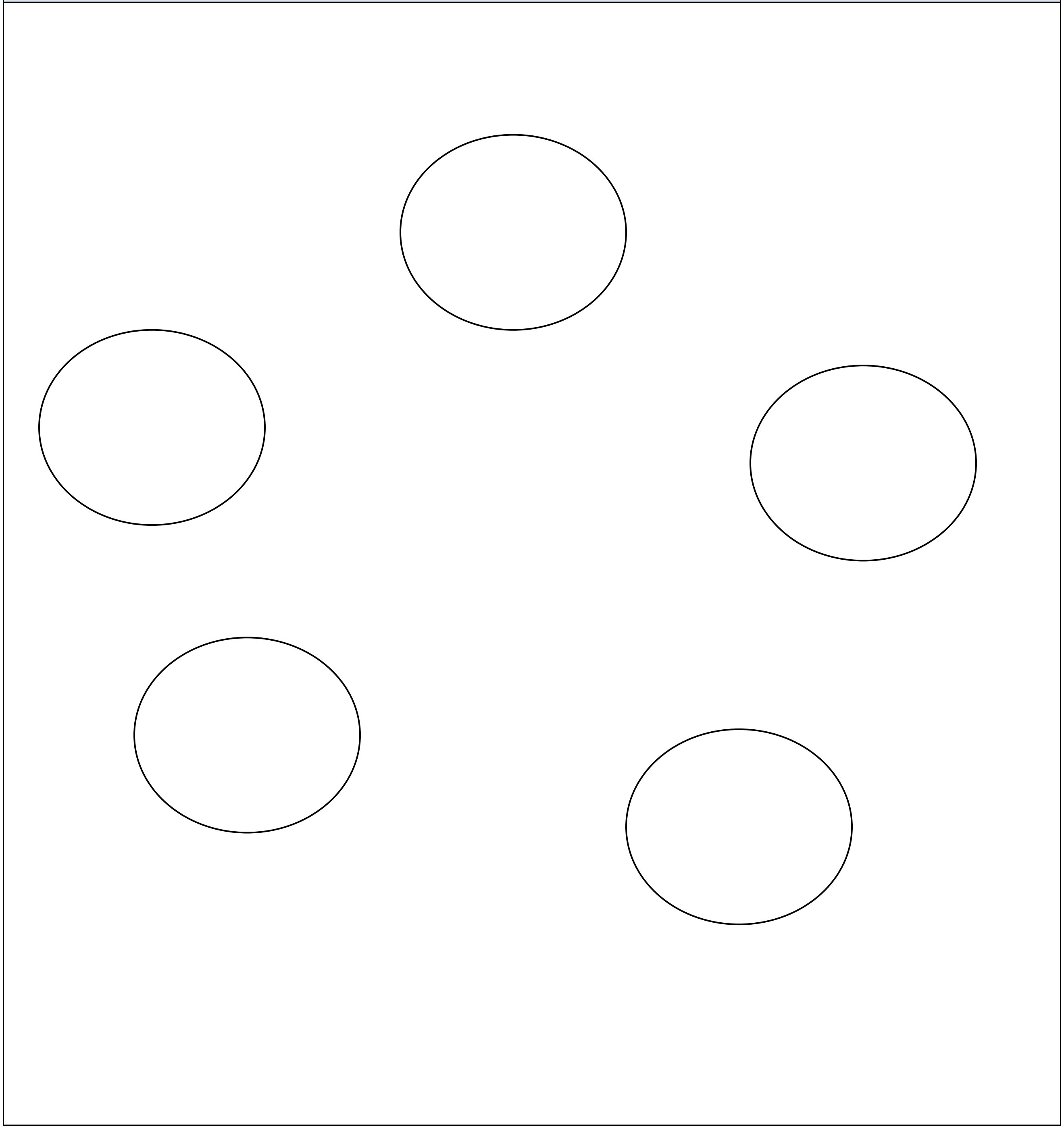
Use concept mapping (mind-map) to understand, develop, and creatively learn about the key points you identified in all of the modules.

Concept Map for Module 1

Create an interrelation diagram to deepen your understanding of these concepts and hone in on the relationship between them.

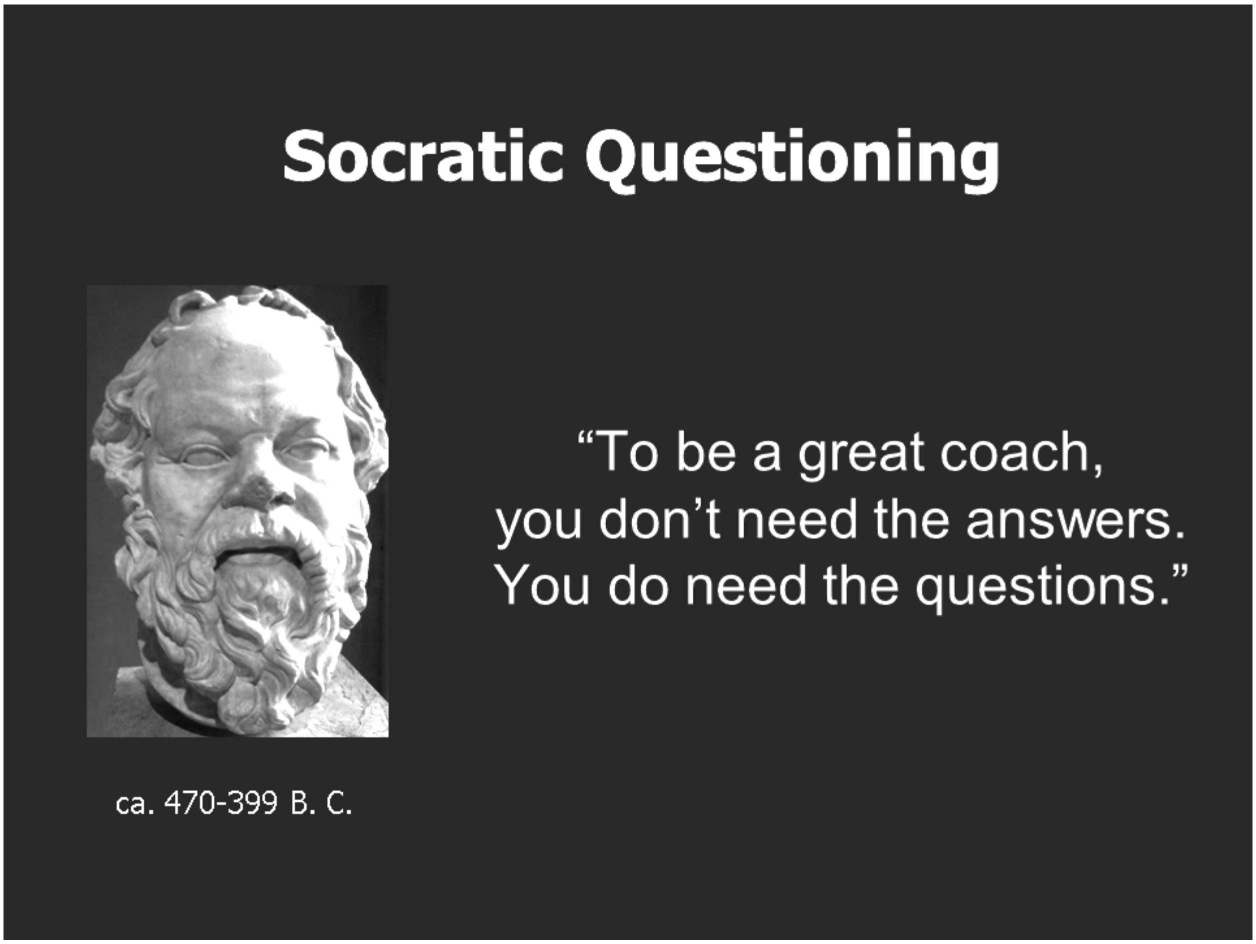
Video (

Interrelation Diagram for Module 1: Write key themes/concepts in each circle



The goal of this exercise is to formalize a general conceptual understanding of the learning objectives (holistic learning) in a very concise description by blending key themes, concepts, terms, and experiences into a statement that opens your mind to understanding how this module will relate to future learning sections.

Socratic Questioning



A Socratic approach to teaching, (named after Socrates, the early Greek philosopher and teacher0, is based on the practice of disciplined, rigorously thoughtful, dialogue.

Socrates was convinced that a disciplined practice of thoughtful questioning enables a student to examine ideas logically. This is known as *disciplina-focus* within the science-of-purpose (SLA, 2014). And the student, from this logical point of view, would be able to determine the validity of those ideas. This process of disciplined questioning can help to correct misconceptions and empower the student, and hence lead them to progressively greater truth and accuracy.

Although "Socratic questioning" appears simple, it is in fact intensely rigorous. Plato, a student of Socrates, described it as feigning ignorance about a given subject in order to acquire another person's fullest possible knowledge of a topic.

Conceptual Clarification Questions

Conceptual clarification questions

Why are you saying that?
What exactly does this mean?
How does this relate to what we have been talking about?
What is the nature of ...?
What do we already know about this?
Can you give me an example?

Note that in this example, the conscious choice a coach makes to remain in profound questioning mode. Applying NPL and strategies to lead a client toward discovery and design of their OWNED solution is a coach. As you will learn in the next section of this chapter, a COACH will want to be equipped with the power of KNOW! In other words, a professional coach is NOT a counselor nor a therapist. They are not a consultant not advocate. Being aware to remain in questioning mode and applying disciplina-focused as a coach will compel individuals to clarify their owned forward-looking pathway.

What happens when the PAST keeps being selected as the future focus?

Correct: refer mental, health, or spiritual advisors when those skills are required. Over 9 million healthy adults seek counseling services every month (Rand, 2014); therefore, help coach a person to the power of that service; keep them forward-looking but do NOT cross the ethical line of attempting to be a healer. That is not a coach.

Be prepared to say NO! when the answers continually seek affirmations, advice, or healing. KNOWING who you will refer is imperative to the Ethics of Strategic Learning Alliance professionals. This doesn't mean people cannot work with you as a coach, be sure that the boundary is properly defined and you execute a disciplined and focused role properly. Probing questions have been demonstrated to be effective in helping people consciously break-through barriers by remaining in a conscious forward-looking modality.

Probing Assumptions Questions

Probing assumptions

Probing assumptions

What else could we assume?
You seem to be assuming ... ?
How did you choose those assumptions?
Please explain why/how ... ?
How can you verify or disprove that assumption?
What would happen if ... ?
Do you agree or disagree with … ?

Probing your client's assumptions makes them think about the presuppositions and their unquestioned (usually limiting) beliefs. People frequently make assumptions based upon their past experience, education, family systems and/or cultural influence. Many times people assume that others will respond/behave the same way that they themselves would.

Probing assumptions question Scenario:

Reflect on in-class examples & compare to recent interactions you have had lately:

Probing Rationale, Reasons and Evidence

When your client gives a rationale for their thinking, question that reasoning rather than assuming it is a given. People often go into a trance state when they begin speaking about their experiences. People tend to "tell their story" in a repetitive manner, rather than really thinking through what happened. Many times, taking a look at a childhood experience through the eyes of an adult will shift their thinking and result in new action.

Scenario:

Your client, Joe, has a goal to fly an airplane. It's reasonable since Joe has a sufficient expendable budget to cover the charges.

"I've decided to learn to fly."

"What is your decision based upon?"

"I love the idea of a faster mode of travel."

"How often do you need to travel fast?"

"Actually, I just like the idea and wanted to get your input."

"Is that a good enough reason to make such a large investment?"

Questioning Viewpoints and Perspectives

Most arguments are given from a particular position; the viewpoint of the client. Often, the client's viewpoints haven't changed since childhood. Challenging their perspective by asking questions may be the perfect catalyst for your client's evolutionary change. You can expand their thinking by demonstrating that there are other valid viewpoints. Examples of questioning viewpoints and perspectives

Have your client examine the forecast of their planning. Do their plans make sense? Are they desirable?

"How could ____________ be used to ____________?"

"How does ____________ affect ____________?"

Meta Programs

Knowing these meta-programs can help us understand how people make decisions and how they think. There are over 20 meta-programs that have been identified. For the purposes of coaching, we are going to look at four of them.

Toward vs. Away

The client is motivated by either moving away or towards something. For example, if you ask your client why they want to lose weight and they say, "I just hate feeling heavy." This is a *moving away* meta-program. As a coach, we want to encourage our clients to move TOWARD their goals, toward what they DO want.

Internal vs. External

The client is motivated by someone else's opinion or is internally driven. For example, if you ask what's been stopping them from losing weight and they say "I don't know what my significant other would think about it". We want to encourage our clients to be INTERNALLY MOTIVATED and not to be influenced by what others think about them. As author Terry Cole-Whittaker said "What others think of me is none of my business."

Global vs. Specific

Big picture vs. every little detail. “Global” clients don’t want to waste time on the small print while “Specifics” want to review every line in the contract; knowing these are necessary to fully understanding the drivers of well-being (Rand, 2014).

This is important for “matching” your client. You do not want to bore a “Global” person with the details. And at the same time, you do not want to gloss over the details with a “Specific”. The key is to leverage the right tools to best understanding your client at a deep level.

Once vs. Several Times

Does your client need to see something more than one time? Do they need to see references or do they operate by their gut feel? Do they need to read dozens of testimonials or can they make a decision on the spot? This is important to know when it comes time to hold your client accountable. You may need to remind your client several times. On the other hand if your client is “Once”, he or she will quickly let you know “he heard you the first time”.

If you have frequently heard the phrase, “I heard you the first time”, you may be “Several Times” person. A “Several Times” person has an innate operating mode of asking several times. They may also hear “I already told you that” or “We talked about that already.”

Common Obstacles to Listening

- **Being Judgmental:** Listening only to gain support for the negative images you already have
- **Rehearsing:** Actively creating your argument against the speaker's point of view as it is being presented
- **Mind Reading:** Disregarding what the speaker is saying, while trying to surmise what they really mean
- **Advising**: Giving advice, instead of just listening, to make you feel needed. Maybe you are giving advice as a way of distancing yourself from the speaker's true feelings
- **Pleasing:** You are so concerned about being nice and placating that you will not hesitate to interrupt to agree just in order to maintain peace. Doing so prevents you from hearing what the speaker needs to say
- **Filtering:** Know that you will hear some things the speaker says, but not everything. Our critical conscious mind has powerful filters.
- **Deflecting:** Redirecting the topic of conversation by changing the subject or telling a joke when the topic is uncomfortable for you

Guidelines for Good Listening:

- Remember the rule to make them "feel important"
- Never interrupt when the other person is speaking
- Allow the speaker to complete his/her thought
- Eliminate distractions
- Maintain eye contact with the speaker, without giving the impression of "staring"
- Show interest by pulling your chair closer and leaning forward
- Keep your posture aligned with that of your target—mirror and match.
- Give verbal and nonverbal responses to what the speaker is saying.

Power Words

Power Words

Influence, Persuade and Motivate

Abundance	Confident	Experience	Infinite
Accomplish	Create	Generate	Inspired
Achieve	Discover	Grace	Naturally
Aware	Easily	Harmonious	Now
Because	Energized	Imagine	Purpose
Before	Enhanced	Immediate	Realizing
Clarity	Exceeds	Impact	Possibilities
Claim	Expanding	Increasing	

Power words influence, persuade and can be used to motivate your client. These words are powerful tools for the professional coach. Using these words as part of your coaching technique will help you:

- naturally and easily influence,
- persuade
- motivate

These words are particularly powerful when sprinkled generously through-out your client's vision statement.

For example:

Because **you took the time to earn your master's degree, you** naturally **feel** energized **and** harmonious **as you become** aware **that you** now hold infinite possibilities before **you. That's right! You** now **have** expanded **your paradigm and can** imagine realizing **your** purpose easily **with** grace**.**

Poison Phrases

Poison Phrases

Deflate, Destroy and Defeat

But	Should have
Can't	Someday
Could have	Sometime
If only	Try
Maybe	What if
Might	Would have

There are words that can poison our minds; words that can discourage, defeat, deflate and destroy our confidence, energy and self-esteem.

Using the word "but" negates anything said before. For example, "I really don't like doing that but, I will". A thoughtful way to say this is to express the true feeling behind the statement "I don't like doing that". Perhaps like this: "This stretches my comfort zone and I will do my best."

"You can't do that!" You may have heard this statement before. And again, Socratic questioning comes in handy. For example, "Can't do what? Have you tried it before? What was the result? What could you do differently next time?"

"Should have", "could have", "would have" "if only"; these phrases indicate regret and thinking about the past. The best-selling author, Eckhart Tolle says that our "pain" is in the past and our "fear" is in the future and our "power" is in the now. Contemplate this for a moment. When we use the phrase "I should have done that", our focus is on a past experience. When we use the phrase "I will do that now", our focus is on the present moment, which truly is our only place of power.

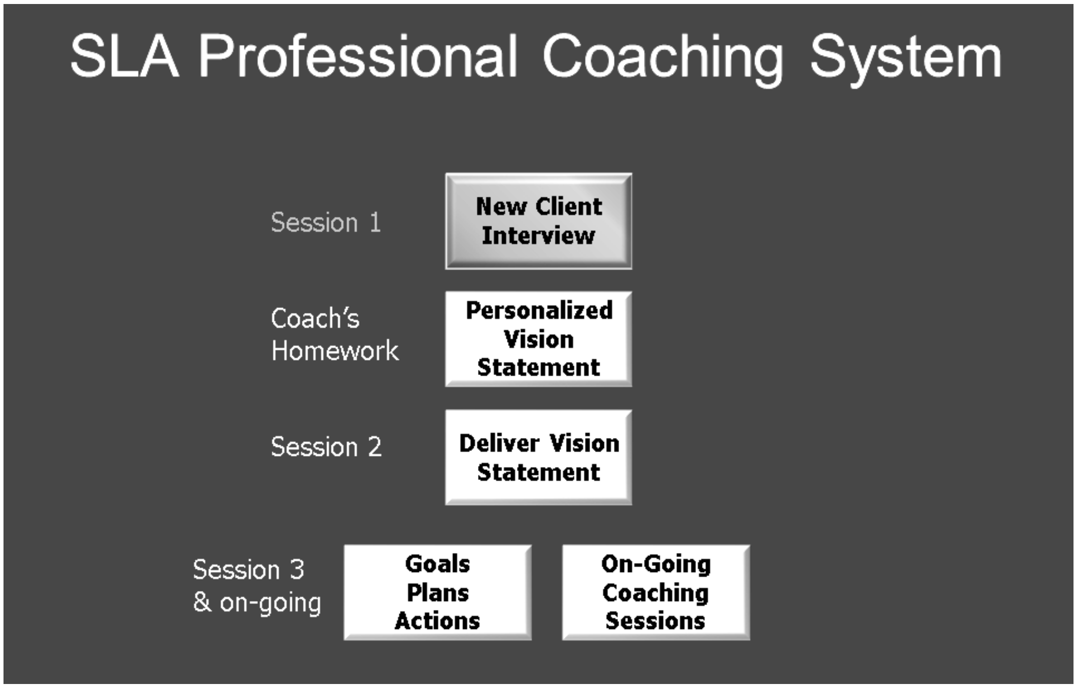
"What if" is a phrase that I listen for when reviewing a client's goals. I call this, "The What If Game". Typically, the "what if's" are associated with fear-based thinking. While it's good to look at the possible consequences of our actions, typically I've found that clients are stifled by "What if" scenarios that they conjure up as reasons not to move forward.

"Maybe" or "Might" are non-committal words. Some people use the "maybe or might" words to avoid the consequence of saying "yes or no" outright. Considering all the consequences of taking an action and making a well-thought out decision of "yes", or "no", is empowering for all involved.

"Someday" or "Sometime" are also non-committal words. As a coach, you don't want to let these slip by you. Always ask your client to commit. "When will you do it? Please put it on your calendar."

And finally, the ambiguous word "Try". When someone says they will "try" to do something, it is another way of being non-committal. Don't let your client get away with using "try". For example, if they say "I will try to make it", this gives a client some wiggle-room to later excuse themselves with "I tried". Truly, they either will make it or they won't make it. Get them to commit to a "Yes" or "No".

The New Client Interview



The new client interview process has two parts. First establishing the baseline of where your client is at and second, identifying the end goals. To get your client from "A" to "B", you need to have a clear picture of where they are AND where they want to go. We begin with the Circle of Personal Perspective to establish the baseline. Then we move into the questions surrounding their one-year goals.

The Vision Statement

The vision statement a powerful affirmative statement about your client's goals, dreams and desires that works to reprogram the subconscious mind and to create new neural pathways in your client's brain. The vision statement is the key to reprogramming the subconscious mind.

The vision statement is:

- A powerful affirmative statement about your client's goals, dreams and desires
- Works to reprogram the subconscious mind by creating new neural pathways
- Uses the Client's Personal Prose
- Uses Power words vs. Poison words
- Uses moving toward vs. moving away statements
- Uses internal motivation vs. external motivation

Five important things to remember when writing your client's Vision Statement:

- Use your client's **Personal Prose**
- Use as many **Power Words and Power Phrases** as you possibly can
- Use **Present Tense** as if your client's goals have already been achieved
- Use **Moving Toward** statements
- Use **Internally Motivated** statements

The Format of the Vision Statement

Relaxation Statement: This can be as simple as, "In a moment, I want you to take 3 deep breaths, breathe in to the count of 4 and breathe out to the count of 8. Begin. When you feel completely at ease, let me know by expressing an "Ah"."

Personalized Vision Statement: Write your client's goals from each coaching category. Follow the rules of the "Five Important Things to Remember".

Summary: Write one or two statements to summarize the goals.

For example: You now experience the Universe working in your life, [*It's very important to use your client's vernacular when referring to their source of power. This could be God, the Core, The Source, My Maker, The Universe, The Grand Architect of The Universe, The Angels, etc.*], creating new possibilities for you moment by moment. You realize now that you are one with everything and you are at peace.

Reminder to Listen Daily: Include a "reminder" to listen to the vision statement daily.

For example: You make the time (20-30 minutes daily) to be with yourself and to listen to your vision statement. You are aware that this daily quiet time expands your awareness of your potential and keeps you aligned with your authentic goals.

Post Relaxation: This can be as simple as, "In a moment, you may want to bring your awareness back to the present. As you gently wiggle your fingers and toes, allow yourself some time to attune to this new paradigm."

	Write your paragraphs here
Identify and summarize the key concepts/themes contained in your learning experience.	

Identify three to five aspects that you learned about coaching and the content you have studied (Note: this will be valuable for one of your portfolios)	
Reflect on your new understanding of coaching; how you will use coaching and the tools you have explored to be an effective coach immediately.	

Coaching Part Two

Delivery of the Vision Statement

Step 1 is to make sure your client is in a comfortable position so that they can be fully present for their vision statement. Make sure your client will not be distracted for the next 20 minutes.

Step 2 is to begin reading the vision statement. There are 3 main components of the Vision Statement. You will read them as follows:

- A - Relaxation Paragraph (read once)
- B - Personalized Vision Statement including the Summary (read 4 to 5 times)
- C - Post relaxation (read once)

Important Note: You may be tempted to stop and discuss the vision statement with your client after the first reading. DON'T DO IT – keep reading. I will explain why.

It important to READ the vision statement four to five times because, the first time you read it through, your client's critical conscious mind will be fully active. Their mind will be thinking things like: "Did I say that? Oh yeah I said that! Wow, my coach really listened. I like how this sounds. I like the feeling I have now. I can really see my new life!"

The second time you read it through, your client's critical conscious mind will STILL be active. Because their critical conscious mind was so active during the first reading, their mind will now hear new things not heard the first time. The third time you read it through, your client's critical conscious mind will start to settle down. The client's mind will be recognizing that these are all the things that they said and that it feels/sounds/looks really good.

The fourth time you read it through, your client's critical conscious mind will FINALLY be relaxed enough for reprogramming to occur. Your client's physical posture may change. Their facial expression may change. They will be really associating and identifying with the vision statement and what their new life will be like once they have accomplished their goals. The fifth time you read it through, your client will really absorb and benefit from the new neural pathways that are being created in the brain.

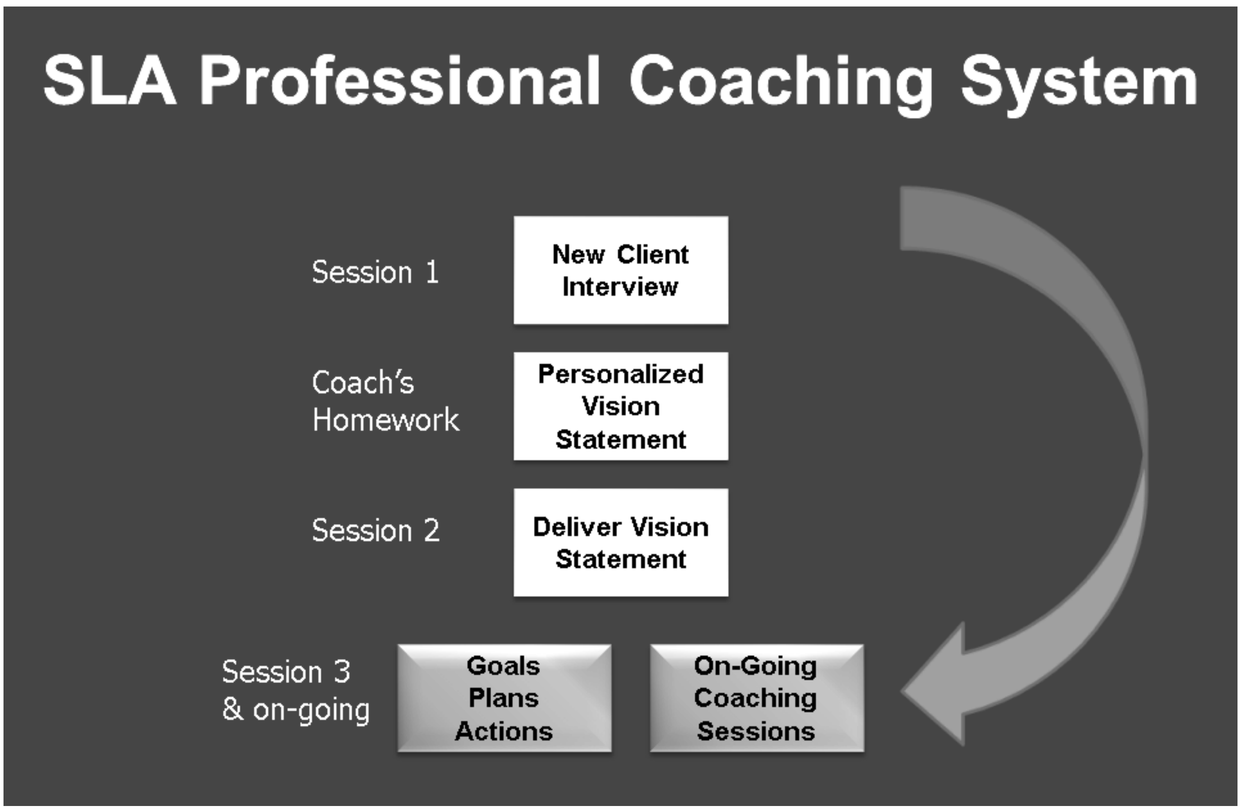
Once your client has taken a moment to fully realize their new potential, it's a good time to remind them of these things:

- The affirmation process helps to reprogram the subconscious mind.
- It helps to create new neural pathways in the brain.
- Explain the importance of listening to it every day for 30 days.
- Explain when to listen to it (and why), and what to expect. They should listen when they are in a relaxed state.

Once you have read the vision statement to your client, it's time to record it. There are many different ways to record your client's vision statement. I recommend you look for resources on the internet. You are sure to find something that suits your style. Before ending the second session:

- Set or confirm your next appointment.
- Ask them to be thinking of which specific 30 day goal(s) they'd like to focus on during your next appointment.

Third Coaching Session



These sessions help your client to:

- Determine their goal priorities
- Articulate the step-by-step actions required to achieve the goals
- Uncover any roadblocks that may be obstruct completion
- Develop a plan to overcome roadblocks
- Get a strong "Why". What are the benefits?

- Commit to a completion date for each action

In your on-going sessions, you will want to:

- Consistently review the goals set in the previous coaching session and acknowledge accomplishments
- If progress was not made, what were the roadblocks and what can they do to work around them?
- Use a new Coaching Session Goal Form and potentially create new goals.

These on-going sessions are the "meat" of coaching. This is where you help your client to:

- Strategize which goals to tackle first
- Devise a plan
- Conquer obstacles
- Stay focused on the tasks at hand

During this coaching phase, it's imperative that you keep your client motivated, inspired and wanting to move forward.

Ask them:

"How would you rate your success on each of these goals?"

"What do you need to do to continue to move forward?"

Review their "WHY" using their personal prose.

Remember to set realistic goals. As a coach, we have no value judgment or criticism, only encouragement that "YOU CAN DO IT".

And finally remember: "Whatever your mind can conceive, and your heart can believe, you will receive." As the beautiful author Marianne Williamson says: "Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure." We are all creators of our experience.

As we fulfill our purpose, we unconsciously give permission to others to fulfill theirs.

Negotiations: The Power of K*NO*W

Negotiation is a part of everyday life! What can you do to increase your ability to influence peers, persuade team members, and improve your relationships and performance?

This highly interactive presentation explores the ways that people negotiate to create value and resolve disputes both personally and professionally.

This book is designed to improve understanding of the negotiation process and to identify negotiation strategies that assist in implementing the highly integrative negotiations process.

This book explores the ways that people negotiate to create value and resolve disputes. Designed both to improve understanding of the negotiation process and to build negotiation skills, this book integrates negotiation research from several academic and professional fields related to applied negotiations.

A unique approach will be identified which combines an integrative process of effective negotiations with successful strategies employed by experienced negotiators. This powerful approach allows participants to: separate people issues from the problem and turn differences into mutual gains.

It will focus on a powerful process of negotiations planning, emphasizing the ***WHAT, the HOW and most importantly the WHO*** of negotiations.
The Power of KNOW is design to provide a process and negotiating strategies to enhance your ability to:

- ✓ Negotiate a better working relationship
- ✓ Negotiate with team members who have their own agendas
- ✓ Negotiate with peers whose cooperation is vital
- ✓ Control escalation of interpersonal conflict
- ✓ Avoid perception of conflicts and keep control of the negotiation process

Who will benefit:

Executives, directors, managers and professionals in many different professions including Engineering, Purchasing, Sales, Finance, IT, Project Management, Legal, and Human Resources who are interested in developing skills they need to achieve success through effective interaction and coalition building

The Power of Know is different from any other book written about negotiations because it specifically focuses on:

1. **Emphasizing the process of negotiations**: While the process is generic it can be effectively utilized in formal, intra-organizational and interpersonal negotiations.

2. **Linking Thinking, Acting, and Learning**: Negotiations are not an isolated function of leadership or management. Rather it is a powerful technique to improve both management and leadership.

3. **Whole-Person Focused Negotiations with a behavior-based model:** based on the Collins method (2005), taking a who-first approach followed by what and how is strategically most effective in a negotiation.

4. **Designing negotiation strategies directly related to the negotiating behavioral model**: most negotiators are driven solely by tactics. Tactics are important. However strategies must be considered early in the negotiation process in order to provide a clear direction, timing and focus to the dialogue and discussion phase of the negotiations process. Furthermore, strategies should focus on holistic understanding not only of the situation, but of the negotiators involved to ensure win-win outcomes.

Executive Summary:

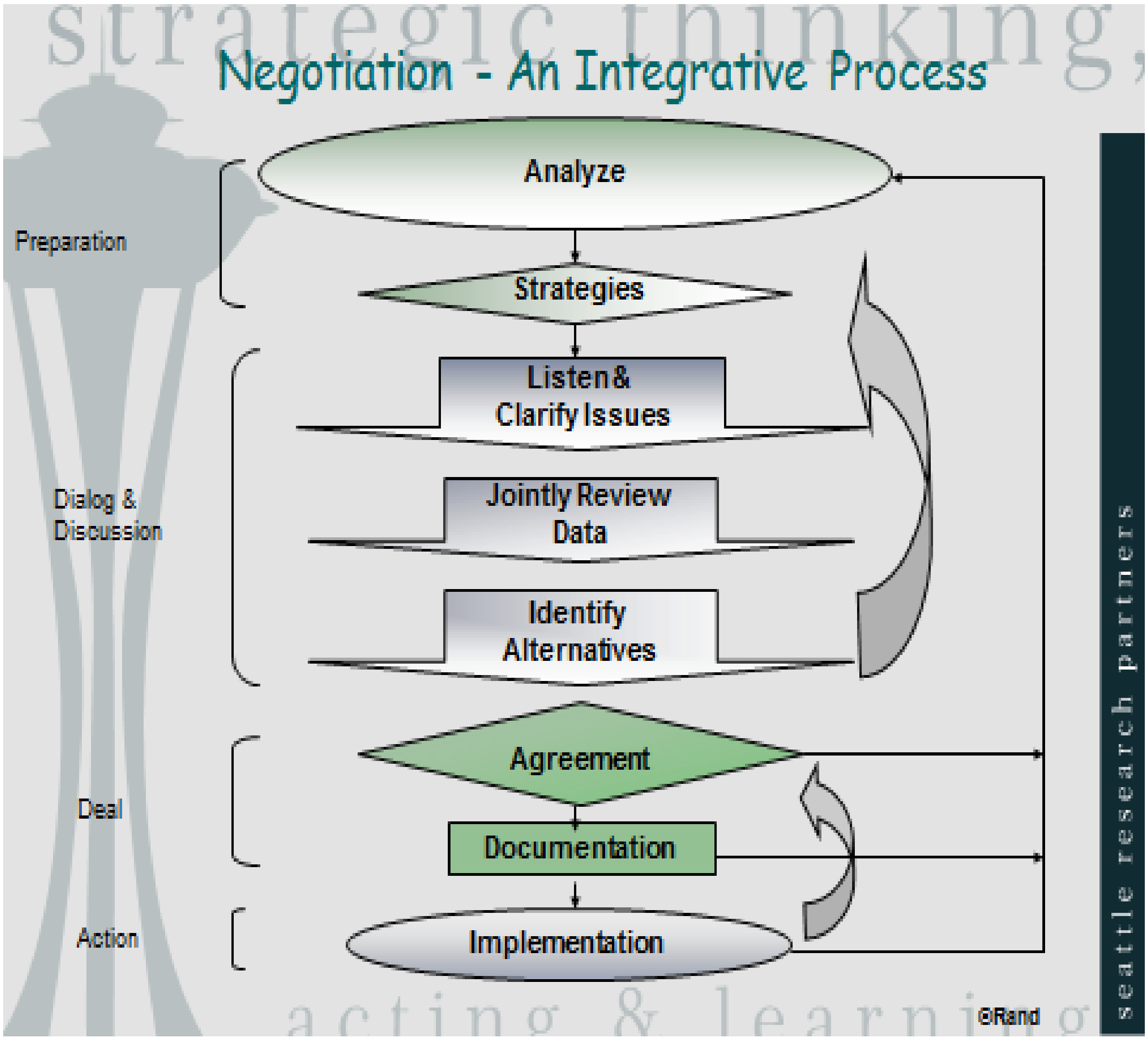
The negotiations process is iterative. It is the link between people, teams, and strategies. Through this guidebook, you are driven toward a process to ensure win-win solutions by first:

- Understanding how to learn: the discipline of continuous greatness by focusing on who-first.
- Understanding how to ask the right question by coaching: gain insight, obtain data for analysis and preparation;
- Cultivation of purpose: win-win negotiations require an individual is trusting, observant, and able to constructively see the and hear the viewpoint of others.

The challenge many will often have is making the leap from strategic thinking into tactical analysis and implementation. The link to ensuring you drill-down with each strategic phase is the negotiation process. This process ensures that while you may drill down throughout the exploration, discovery, and design phases; that you are doing so while building toward a win-win.

For this reason, we teach the "Power of KNOW." Effectively applied knowledge is fundamentally different than efficiency and skill. Research tells us those individuals who cultivate themselves as an effective leader; do so by choice (Rand & Mashuta, 2012). Furthermore, they choose to ensure they apply the right tools as the right time!

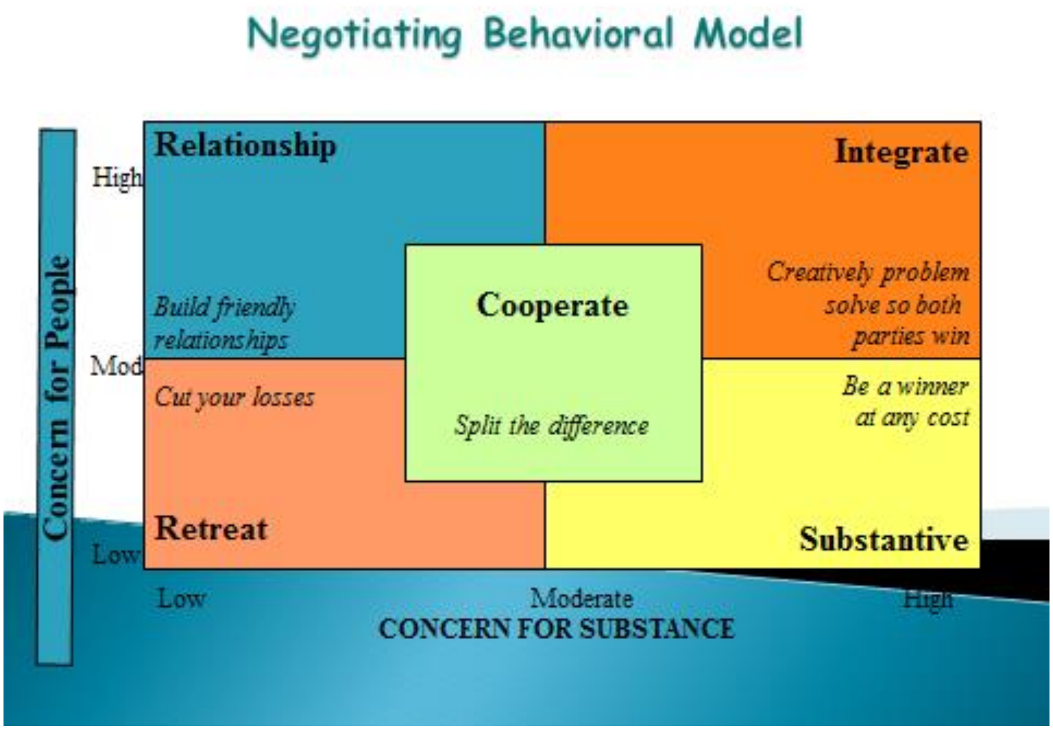
A negotiation, most aptly defined, is an integrative process where by two or more parties work to arrive at a desired outcome.



Negotiation Process:

There are four primary negotiation styles. Unfortunately, negotiators may often find themselves in positions where trust is not established. As a result, issuing assessments is not always possible.

Therefore, the key to effective negotiations is learning to understand negotiations behaviors of one 's self; applying the strategic learning process to then accurately and effectively perceive other's position. Using the following tool, discover your primary negotiation style:



1) Using your Learning to Learn tools, LIST 3-5 people you feel fall into each category:

2) Why might cooperative strategies mistakenly be sought as a "win-win"

3) Which do you think might be your style?

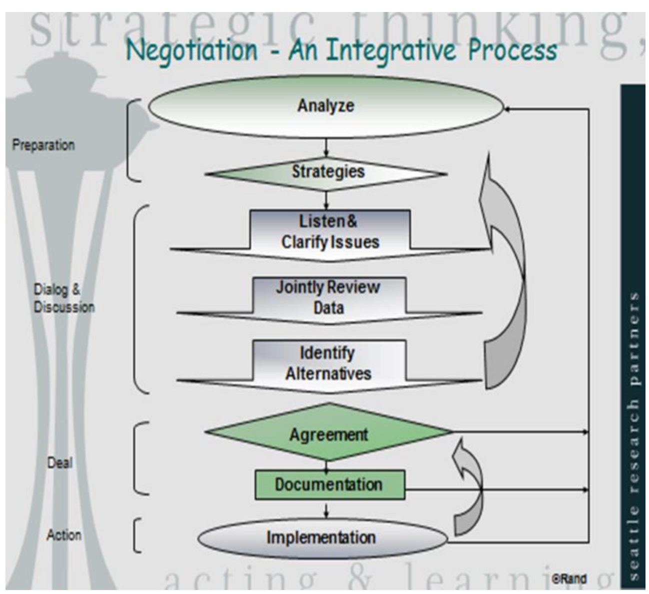
Negotiation Behaviors

Purpose

- ✓ Identify your primary and backup negotiation styles
- ✓ Design personal goals for the negotiation symposium
- ✓ Identify other parties' negotiations styles
- ✓ Develop strategies for responding to other's styles

Use the following process to assess your primary negotiation style:

1) Complete the assessment on the next three pages
2) Follow the directions to analyzing your results.
3) Compare the results to the histogram for secondary strategies.



Negotiating Behavior Assessment

Directions: Please consider the following 30 statements in terms of your approach to negotiating. Place an "x" in the box that reflects your level of agreement with each statement.

1= strongly disagree 2= disagree
3= somewhat disagree, 4=somewhat agree, 5=agree
6=strongly agree

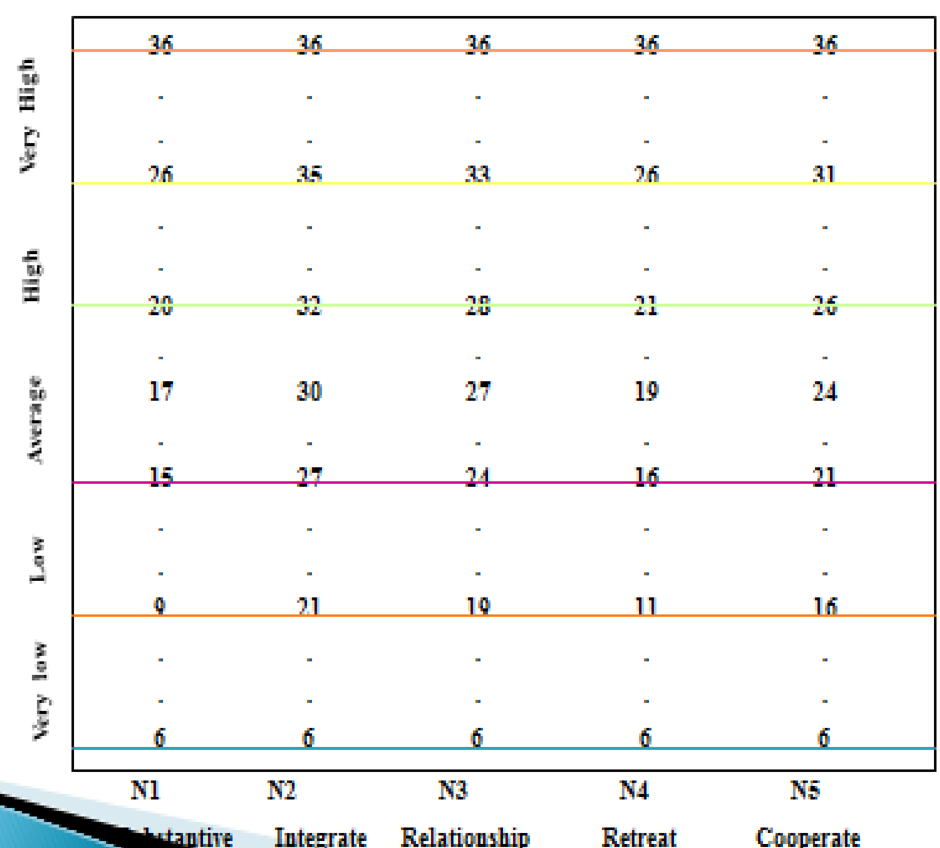
	STATEMENTS	1	2	3	4	5	6
1	My interests are most important when I negotiate.						
2	I try to use objective criteria rather than my demands						
3	A friendly approach to negotiating is better than a confrontational one.						
4	I often do not have the authority to produce a successful outcome.						
5	It is better to come away with something rather than nothing.						
6	Negotiation is an adversarial situation.						
7	I identify shared principles as a method for resolving dilemmas.						
8	You have to make concessions to build the relationship.						
9	You can only get what others are willing to concede.						
10	Compromise is the essence of effective negotiation						
11	I like having the reputation of being a tough negotiator.						
12	A negotiation is effective when both parties' needs are met.						
13	Affable relationships produce the best results						

	STATEMENTS	1	2	3	4	5	6
14	I keep a low profile during a negotiation.						
15	I like to Split the difference						
16	A negotiation is a contest of wills.						
17	Effective negotiators develop partnerships.						
18	A soft word can win a hard heart.						
19	Conflict can be reduced by playing down hot issues.						
20	My approach is to meet the other party half way.						
21	Do onto others before they do it to you.						
22	During a negotiation I try to work through differences.						
23	I try to find a solution that will make the other party happy.						
24	I let others solve the problems.						
25	I look for trade-offs when I negotiate.						
26	Threats, bluffs, and surprises are effective negotiating tools.						
27	The most successful negotiation achieves results for all parties.						
28	During a negotiation I assume the role of peacemaker.						
29	I put aside decisions until conflicts have been resolved.						
30	Negotiations require quid pro quo.						

Directions: **Each of the above statements correlates with a specific negotiating style. Add up the numbers and place your score in the left column. Then plot your score on the attached graph.**

PROFILE OF NEGOTIATING STYLES	**Your Score**	**Team Score**	**Nat Avg**
SUBSTANTIVE (#'s 1, 6, 11, 16, 21, 26)			
INTEGRATE (#'s 2, 7, 12, 17, 22, 27)			
RELATIONSHIP (#'s 3, 8, 13, 18, 23, 28)			
RETREAT (#'s 4, 9, 14, 19, 24, 29)			
COOPERATE (#'s 5, 10, 15, 20, 25, 30)			

Negotiating Behavioral Profile



Negotiations: The Power of K***NO***W

Negotiating is not a standalone process. It is connected with the process of Leadership as well as critical and strategic thinking. This highly interactive presentation explores the ways that people negotiate to create value and resolve disputes both personally and professionally.

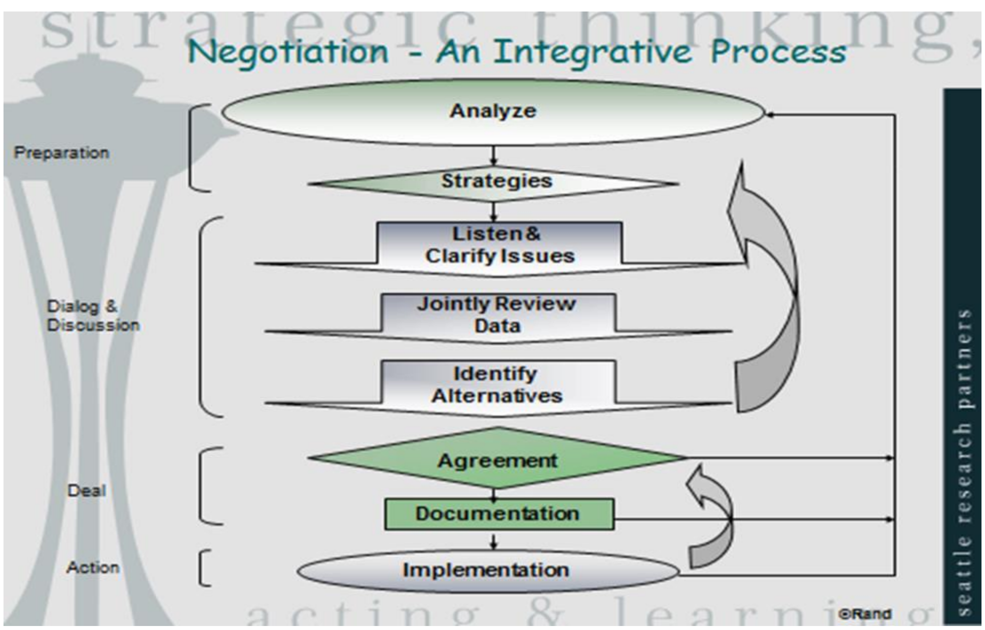
This book is designed to improve understanding of the negotiation process and to identify negotiation strategies that assist in implementing the highly integrative negotiations process. The key now is to LINK:

- Learning Purpose
- Learning Strategy
- Learning Critical Thinking
- Individual and Team Leadership
- Coaching WHO FIRST!
- Negotiating with the power of KNOW

What can you do to increase your ability to influence peers, persuade team members, and improve your relationships and performance?

NEGOTIATION PROCESS
Planning & Preparation

A unique approach was identified which combines an integrative process of effective negotiations with successful strategies employed by experienced negotiators who learn by asking questions and remaining in preparation, discussion, and dialogue.



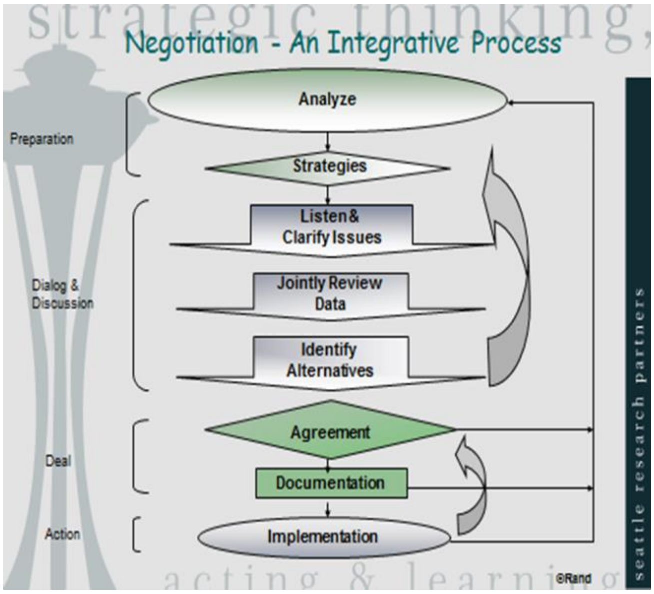
Define and Analyze

- Resources
- Organization culture
- Environment
- Issues
- Facts and circumstances

How do these topics above relate to exploration phase of strategic thinking?

Decide

- Objectives
- Positions
- Team
- Strategies



These skills have been explicitly linked to the power of compelling others to choose leadership (Rand & Mashuta, 2012; Rand & SLA, 2013; SRP 2007-2014; see also Rand, 2014). The preparation process starts a shift into discussion requiring the effective use of coaching as an applied skill-set.

Listen and clarify issues

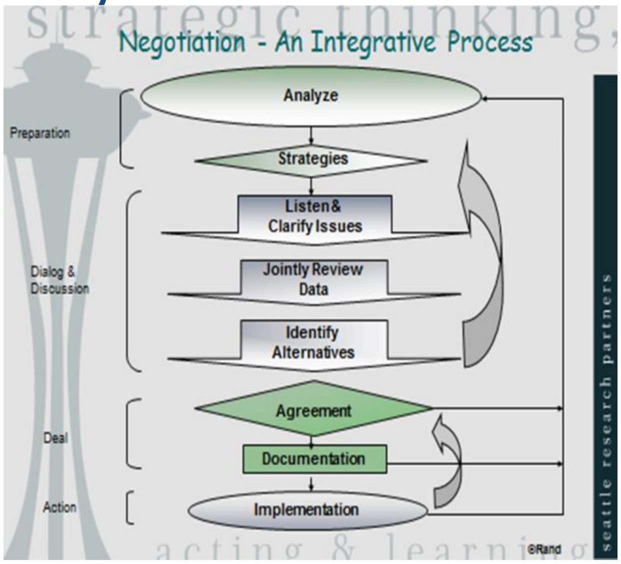
- How are they describing their issues and concerns?
- What are their expectations?
- How can differences be resolved from their point of view?
- Clarify interests, needs and concerns

Think of an opportunity you had to listen and clarify:

- How did your negotiation style impact your experience?
- What skills would you use to improve performance next time?
- What tool might help you recognize and unlock knowledge at the speed of innovation, patience, and REACH required in modern negotiations?

Write your analysis below in 3 paragraphs or less with IMPACT (see section 1 & 2 for writing with MEAT/IMPACT):

Jointly Review Data



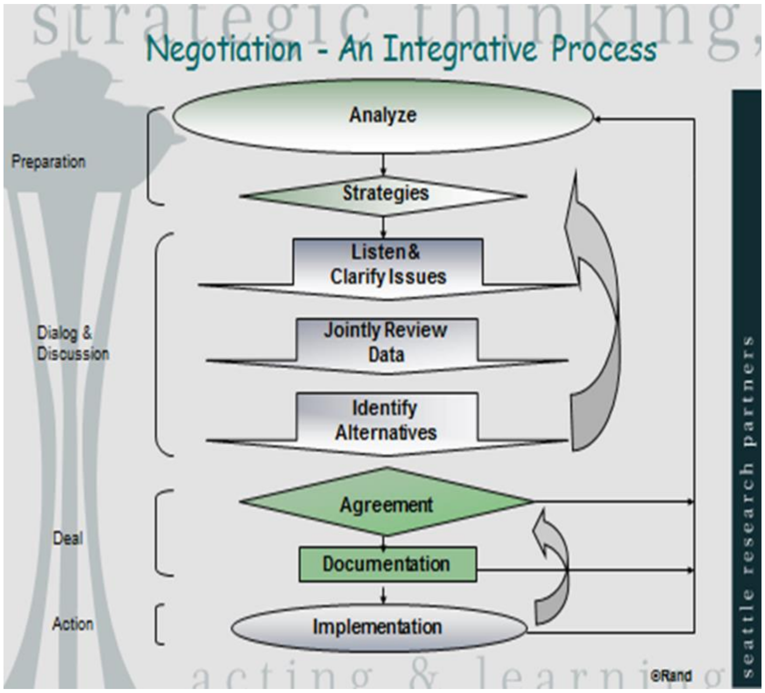
- Use available sources and information
- Obtain assistance from experts
- Gather additional information

What tools might you leverage to ensure accuracy of data focused on who first?

What skill(s) might be best used when you jointly review data? How do you know?

NEGOTIATION PROCESS

Dialogue and Discussion



Identify alternatives

- List issues
- Brainstorm alternatives
- Improve alternatives
- Jointly decide on the best alternatives

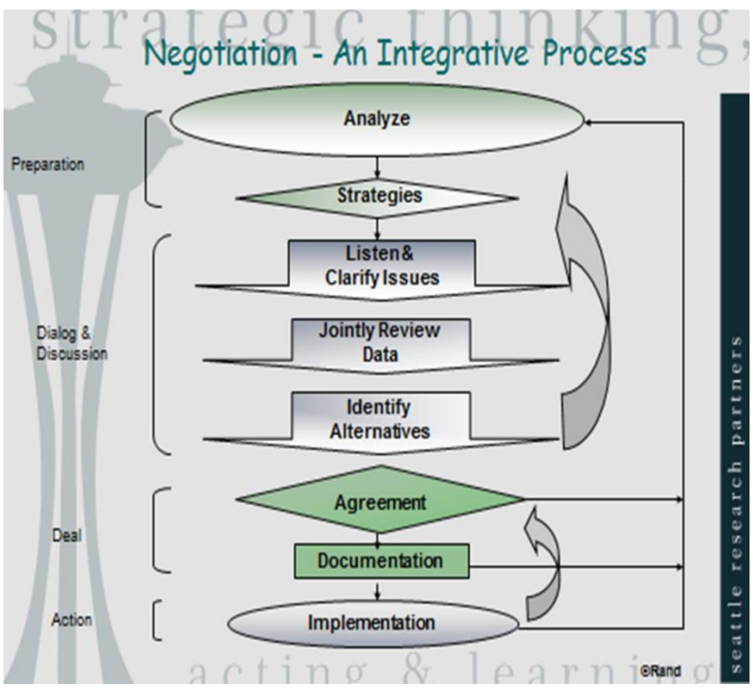
Describe a situation where you could have leveraged positive-thinking, acting, and learning to have defined better win-win alternatives prior to moving forward in a negotiation? How might you approach it differently in the future?

COMMITMENT

Ask for points of agreement!

How does a shared and inspired vision help with this step?

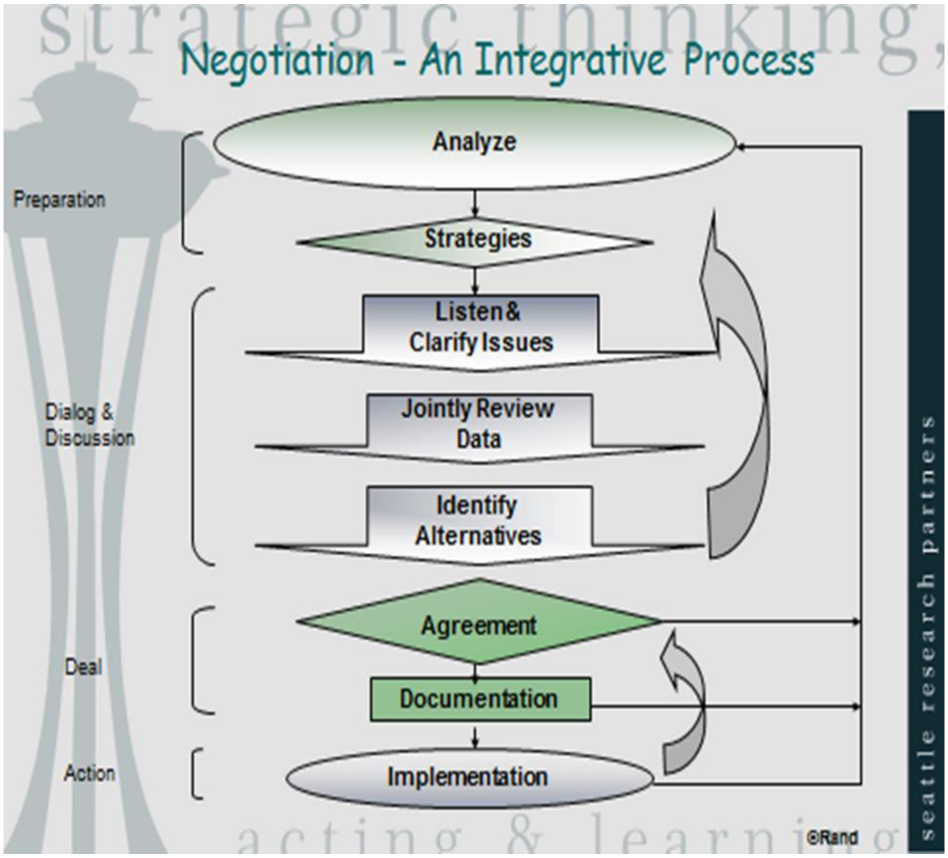
Think of a time you would have achieved win-win had you focused on coaching to a win-win vision. How would you approach that person now?



DOCUMENT

Specify overall completion date; list sequential action steps; edit, delete, combine or subdivide action steps; and identify specific accountability for each action with a cadence of accountability and routine meetings.

How does this step relate to learning-to-learn covered in early sections of this book?



"Build a MAP; Follow-the MAP; Document with profound purpose!" (Rand, 2014)

The Power of KNOW explores the ways that people negotiate to create value and resolve disputes based on their individual purpose. Designed both to improve understanding of the negotiation process and to build negotiation skills, this book integrates negotiation research from several academic fields with applied negotiation experience. The Strategic Learning & Leadership guide helps you effectively apply knowledge to attain professional excellence (PEAK)™.

BOOK REVIEW

Chapter 1- identifies the process of immediate learning to lead, coach, and negotiate with IMPACT!

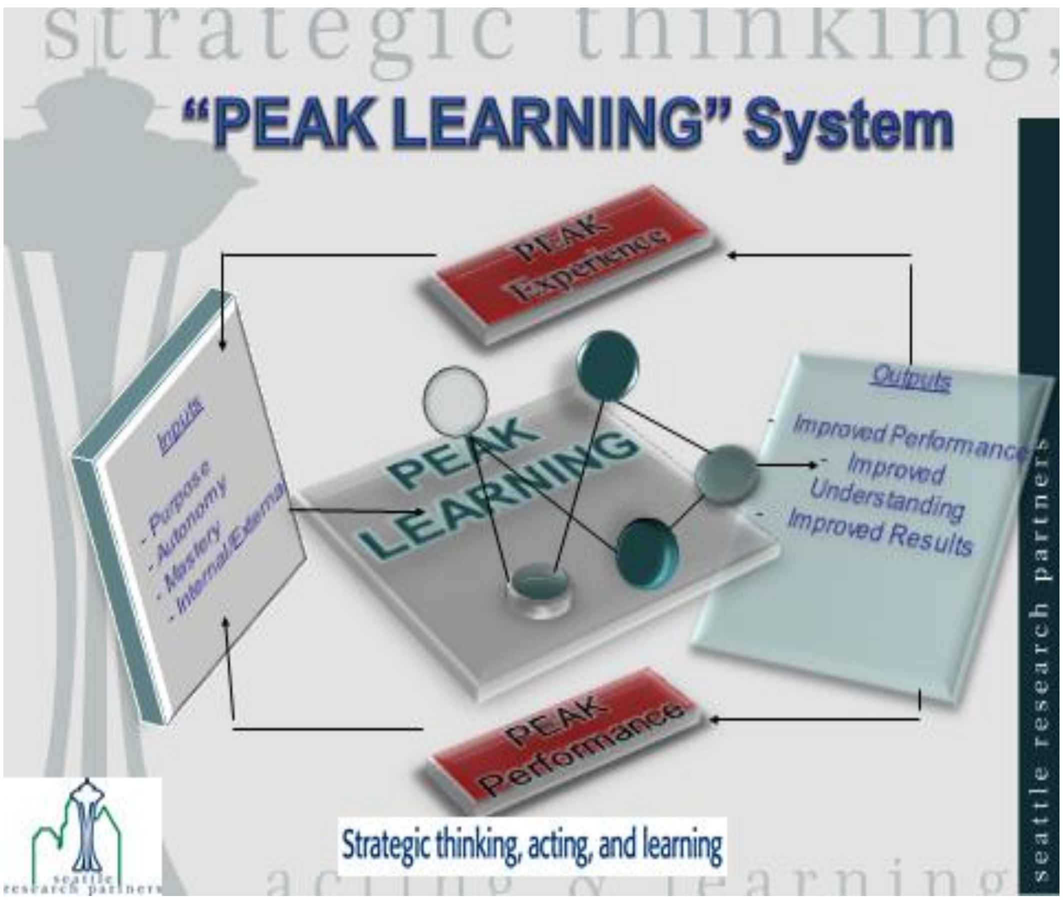
Chapter 2 - identifies the concept of leadership, critical and strategic thinking and their relationship to the process and science of learning purpose.

Chapter 3 – details the importance of preparation by understanding separate but integrated theories, skills, and processes. The preparation phase also indicated the importance of analyzing based on leveraging tools of learning, tools of REACHING others, and the process to discover the invisible driving character: Science of Purpose.

Chapter 4 - expands on the dialogue and discussion of these theoretical, applied, and process models by providing you an integrated opportunity to explore applied-learning; leverage tools of discovery; and engage others with the intent to hone your ability to understand WHO FIRST; REACH a person at their inner-purpose, or core, and effectively deploy a negotiations process to seek a win-win result.

Chapter 5 - identifies two key tools necessary to ensure the success of effective leadership by providing research-based data, recommendations, and purposeful direction (reflective brief) and cultivation of a disciplined and focused MAP of action. These tools, used in all industry, are empirically proven to work (SRP, 2011-2014; Pink, 2012; Rand & SRP, 2014; see also SRI, 1999).

Chapter 6 - reviews how the integration of negotiations ensures a disciplined link between learning, leadership, group engagement, strategic thinking, and implemented results.



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