LEADERSHIP USA®

Learning to Lead: Proven Strategies Guaranteed to Succeed

Presented by Richard Bryan, CSP

June 24, 2024

2024 Calendar of Learning Events

LEADERSHIP USA®

LEADERSHIP USA®
DEVELOPING YOUR EXTRAORDINARY LEADERS

Location:
The Conference Center at RidgeGate
9878 Schwab Way, Suite 401, Lone Tree, CO 80124

Schedule:
8:30 AM registration, 9:00 AM to 12:00 PM meeting
Includes breakfast, materials, and parking

Cost (includes recording):
Live Event (instructor-led): $249 per person (group discounts available)
Live Stream (watch from any location): $129 per person (bulk discounts available)
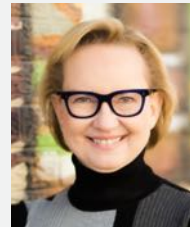
Registration:
Go to LeadershipUSA.com/events, email Nadine@LeadershipUSA.com, or call 303-471-7401

Monday, January 22, 2024

Elaine Dumler presents
Presentations That Influence Change: Getting the Right Information . . . to the Right People . . . in the Right Format

Monday, February 19, 2024

Cindy Solomon presents
Building Your Courage: Creating Engagement, Accountability and Results

Monday, March 25, 2024

Carolyn Strauss presents
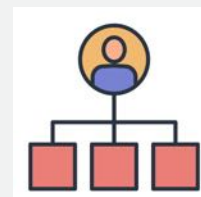**Effective Execution: The Art of Getting Work Done**

Monday, April 22, 2024

Jon Macaskill presents
Unleashing the Power of Preparedness, Resilience, Grit, and Compassion: A Navy SEAL Commander's Blueprint for Personal Growth

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Monday, May 13, 2024

Jenn Dewall presents

How to Manage Burnout and Overwhelm: Find Joy at Work Again

Monday, June 24, 2024

Richard Bryan presents

Learning to Lead: Proven Strategies Guaranteed to Succeed

Monday, July 22, 2024
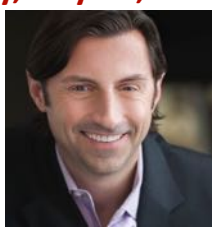
Gerry O'Brion presents

Maximizing Your Influence: Influencing Customers, Co-Workers and Employees to Say Yes to You

Monday, August 19, 2024

Keith Bailey presents

TrustWorking: Cultivating Connections Within Your Sphere Of Influence

Monday, September 16, 2024

Julie Holmes presents

UPGRADE Your Team: 7 Steps to Becoming an AI-Empowered Organization

Monday, October 14, 2024

Jerome Wade presents

The Momentum Accelerator: Unleashing Dynamic Strategies for Massive Breakthroughs

Monday, November 11, 2024

Greg Williams presents

Rise to Superhero Status: Mastering Vital Soft Skills for Exceptional Achievement

Monday, December 16, 2024

Stephanie Wachman presents

Wired to Connect: The Neuroscience of Communication and The Impact of Our Words

Information About This LEADERSHIP USA® Learning Event

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AGENDA
Registration starts at 8:00 AM. The workshop starts at 9:00 AM and concludes promptly at 12:00 PM. A fifteen-minute coffee break is scheduled for 10:30 AM. Breakfast is served from 8:00 to 9:00 AM. Restrooms are by the elevator door, as well as the 1st & 2nd floors.

MICROPHONES
This event is being livestreamed around the U.S., so please use the wireless microphones when speaking. Even if the live audience can hear you in the room, the remote audience can't unless you speak into the microphone. Thank you in advance!

PHONE CALLS
As a courtesy to others, please mute your phones during the program. If you must take a call, please take the elevator down to the first floor lobby. (We can hear your conversation if you stand by the restrooms.)

OUTSIDE WORK
Texting, working on your laptop, and responding to email can be a distraction to your fellow learners. Please be present during the event and work outside the meeting room.

REGISTRATION
The schedule of upcoming LEADERSHIP USA learning events is included in the front of this workbook. Register with a credit card online at LeadershipUSA.com/events or email Nadine@LeadershipUSA.com to receive an invoice.

FEEDBACK
To best meet your needs, we need your input! At the conclusion of the session, please complete the paper or online evaluation using the QR code or URL on the inside back cover.

CERTIFICATION
To receive 3 SHRM, and 3 HRCI credits for this event, please email your request to Nadine@LeadershipUSA.com.

Thank you and have a great day!

RICHARD J BRYAN
THE BRYAN GROUP, INC.

Family Business Story

1. SET A CLEAR VISION

- Start with the end in mind. This should be looking at least 5 to 10 years in the future and a stretch from where you are today.

Exercise One: Write a Letter   15 Minutes

- Write a letter to you today from your future self in 5 - 10 years' time. Write it as if you are connecting with your best friend and sharing all of the great things you have done professionally, personally and in your community.

- What are you most proud of? What are some bucket list items you have checked off your list?

- Don't be afraid to think big.

- Write as a stream of consciousness with no editing - you can do that later.

2.   DEFINE YOUR ROLE

- Focus on doing the things that *ONLY YOU* can do in your business.

Exercise Two: Time Audit   15 minutes

- First, list everything you currently do at work in a typical week/month. Then estimate how much time you spend on each task.

- Second, identify the things that **ONLY YOU** can do. This is where you should be spending the majority of your time.

- Third, what is the **ONE THING** you could stop doing or delegate today that would free up the most time?

3. BUILD A TEAM OF A-PLAYERS

- A Players = Self-Disciplined People Who Consistently Live Core Values & Hit KPI-Driven Goals

Exercise Three: Job Scorecard   15 minutes

- Complete the job scorecard for a position you are hiring for now or one you will be hiring for in the next 12 months.

- Alternatively complete the scorecard for one of your direct reports.

- Competencies: 12 to 15 for C Level position, 8 to 12 for a mid level position, 5 to 8 for an entry level position

- Core Values: 3 to 5 max

Scorecard for the role: VP of Sales

Employee/Candidate: Jill Tan
Date: 8/1/2019
Rating and Comments (A,B,C): A

Supervisor/Interviewer: Jay Simms
Recommendation: Proceed

MISSION: The mission for this role is to convert existing consulting clients into software customers, to achieve $100M in sales by 12/31/2025.

ACCOUNTABILITIES/OUTCOMES:

	ACCOUNTABILITIES/OUTCOMES (What KPI has to go from X to Y Two Years Out?)	RATING and COMMENTS
1.	SALES: Grow software sales from $30.5m in 2023 to $100m by 12/31/2025.	A. Karen implemented a new sales strategy in mid-2020 and is pacing to improve her team's performance by 30% in 2022. She should land at $80m by EOY, well on her way to hitting the $100m target in 2023.
2.	CUSTOMER SATISFACTION: Improve from 75% customer satisfaction in 2023 to 90% customer satisfaction by 12/31/25 by selling appropriately-scoped software, and by providing excellent training and support.	A. Won "Top Customer Ratings" award two years ago; cleared 90% customer satisfaction ratings in 2 of last 3 years.
3.	MARGIN: Increase gross margin from software sales from 18% in 2022 to 25% by 6/30/25 through pricing, by focusing on high-value clients, facing high-value problems, at high-value moments in time.	B. Tends to "give away the store" to make first-time buyers happy, but increases price later.
4.	HIRING: Build an inside sales team from 5 account managers with 60% A Players (3 As, 1 B, and 1 C) in 2023 to 10 account managers with 90% A Players by 7/31/25.	A. Karen won the "Recruiting Maniac" award in 2021 and has built a strong account management team with 80% A players.
5.	UPSELL: Increase upsell average upsell from $30 in 2022 to $60 by 11/1/25.	B. Karen took some time to adopt an "upsell" philosophy during her previous role, but once she found an upsell path, proceeded to coach her team to hit goal in 3 out of the next 4 quarters.

COMPETENCIES:

SKILLS TO EXCEL WITH PRIORITIES	SKILLS TO EXCEL MANAGING PEOPLE (IF APPLICABLE)	SKILLS TO EXCEL WITH INTERNAL & EXTERNAL RELATIONSHIPS	TECHNICAL SKILLS FOR THE ROLE
Brainpower/learns quickly, B	Hires A players, A	Integrity/honesty, A	Finance, B
Analysis skills, C	Develops people, A	Calm under pressure, A	HR, A
Strategic thinking/visioning, B	Removes underperformers, A	Aggressive, A	Legal, B
Creative/innovative, B	Network of talented people, A	Moves fast, A	Information Technology, B
Sets high standards and goals, A	Holds people accountable, A	Follows through on commitments, A	Other Role-Specific Skills Direct sales, A Digital marketing, B PR, B
Organization and planning, A		Enthusiasm/ability to motivate others, A	
Time Management, A		Persistent, A	
Proactivity/takes initiative, A		Work ethic, A	
Attention to detail, B		Treats people with respect, A	
		Flexible/adaptable, B	
		Listening skills, A	
		Open to criticism and others' ideas, A	
		Written communications, B	
		Oral communication, A	
		Teamwork, A	
		Persuasion. A	

Scorecard for the role:

Employee/Candidate:

Date:

Rating and Comments (A,B,C):

Supervisor/Interviewer:

Recommendation:

MISSION:

ACCOUNTABILITIES/OUTCOMES:

	ACCOUNTABILITIES/OUTCOMES (What KPI has to go from X to Y Two Years Out?)	RATING and COMMENTS
1.		
2.		
3.		
4.		
5.		

COMPETENCIES:

SKILLS TO EXCEL WITH PRIORITIES	SKILLS TO EXCEL MANAGING PEOPLE (IF APPLICABLE)	SKILLS TO EXCEL WITH INTERNAL & EXTERNAL RELATIONSHIPS	TECHNICAL SKILLS FOR THE ROLE
Brainpower/learns quickly	Hires A players	Integrity/honesty	Finance
Analysis skills	Develops people	Calm under pressure	HR
Strategic thinking/visioning	Removes underperformers	Aggressive	Legal
Creative/innovative	Network of talented people	Moves fast	Information Technology
Sets high standards and goals	Holds people accountable	Follows through on commitments	Other Role-Specific Skills Direct sales Digital marketing PR
Organization and planning		Enthusiasm/ability to motivate others	
Time Management		Persistent	
Proactivity/takes initiative		Work ethic	

COMPETENCIES *(Cont'd)*:

SKILLS TO EXCEL WITH PRIORITIES	SKILLS TO EXCEL MANAGING PEOPLE (IF APPLICABLE)	SKILLS TO EXCEL WITH INTERNAL & EXTERNAL RELATIONSHIPS	TECHNICAL SKILLS FOR THE ROLE
Attention to detail		Treats people with respect	
		Flexible/adaptable	
		Listening skills	
		Open to criticism and others' ideas	
		Written communications	
		Oral communication	
		Teamwork	
		Persuasion	

SKILLS vs. COMPETENCIES

Skills and competencies are just two ways of talking about ability, right? Not exactly. Competencies tend to be limited to individual behaviors in particular roles. Skills are better for transformation and agility; they're quantifiable, standardized, and create a structure for internal mobility.

Skills
- Based on expertise
- Universal meaning
- Transferable across roles
- Tracking inputs that lead to specific business outcomes

Competencies
- Based on behavior
- Contextual meaning
- Aspirational within a given role
- Mixing together knowledge, skills, actions, and attitudes

List of Competencies and Core Values

List of VALUES

Accountability Achievement
Adaptability
Adventure
Altruism
Ambition
Authenticity
Balance
Beauty
Being the best
Belonging
Career
Caring
Collaboration
Commitment
Community
Compassion
Competence
Confidence
Connection
Contentment
Contribution
Cooperation
Courage
Creativity
Curiosity
Dignity
Diversity
Environment
Efficiency
Equality
Ethics
Excellence
Fairness
Faith
Family
Financial stability
Forgiveness
Freedom
Friendship
Fun
Future generations

Generosity
Giving back
Grace
Gratitude
Growth
Harmony
Health
Home
Honesty
Hope
Humility
Humor
Inclusion
Independence
Initiative
Integrity
Intuition
Job security
Joy
Justice
Kindness
Knowledge
Leadership
Learning
Legacy
Leisure
Love
Loyalty
Making a difference
Nature
Openness
Optimism
Order
Parenting
Patience
Patriotism
Peace
Perseverance
Personal fulfillment
Power
Pride

Recognition
Reliability
Resourcefulness
Respect
Responsibility
Risk -taking
Safety
Security
Self-discipline
Self-expression
Self-respect
Serenity
Service
Simplicity
Spirituality
Sportsmanship
Stewardship
Success
Teamwork
Thrift
Time
Tradition
Travel
Trust
Truth
Understanding
Uniqueness
Usefulness
Vision
Vulnerability
Wealth
Well-being Wholeheartedness
Wisdom

Write your own:

_____

_____

_____

4. MAKE THE TOUGH DECISIONS

- We have established that nothing replaces hiring somebody's history of success. Much more valuable than hiring experience.

- But what about the people you already have on your team? Are they A, B, or C-Players?
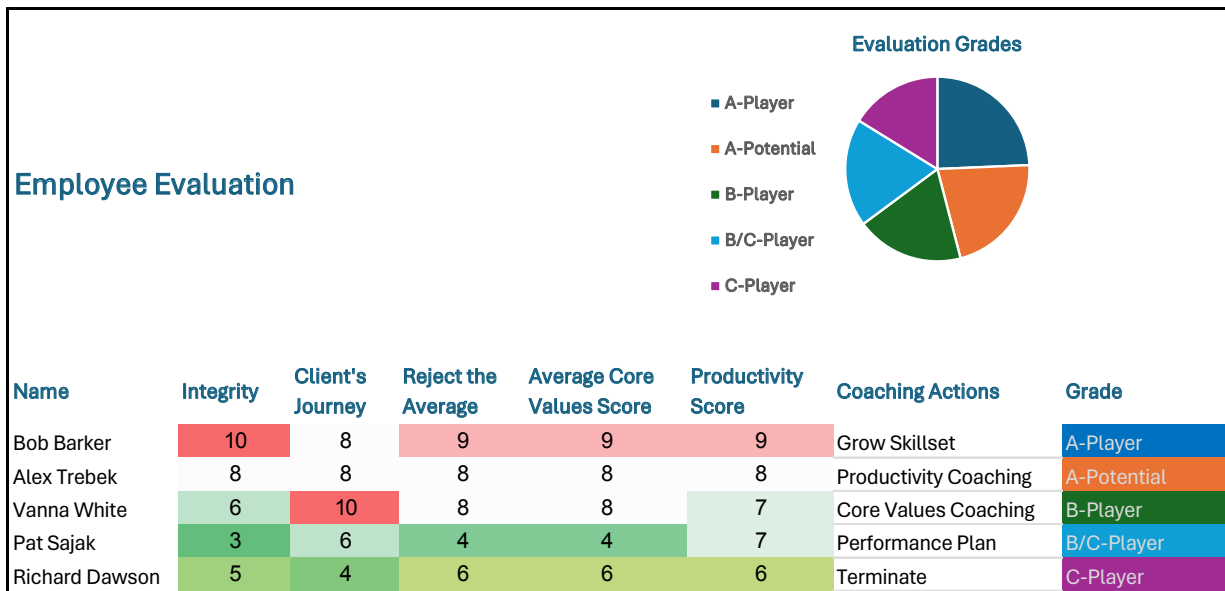
Understanding How to Grade Talent

- A-Player: Highly Productive; Hits KPI-Driven Goals Often, Lives Core Values
- A-Potential: Potential to Function as an A-Player within 12 months
- B-Player: Mediocre Productivity; Lives Core Values
- B/C-Player: Highly Productive, Does Not Live Core Values
- C-Player: Lower than Average Production, Does Not Live Core Values

Every leader from the CEO out must know the A Player % of their team and commit to improving their talent through:

- Growing A-Players
- Coaching A-Potential Players and B Players
- Warning B/C-Players
- Removing C-Players

Talent Evaluation is the process of grading the combined behavior and performance of employees, resulting in a single score of A, A Potential, B, B/C, or C.

Employee Evaluation

Evaluation Grades

- A-Player
- A-Potential
- B-Player
- B/C-Player
- C-Player

Name	Integrity	Client's Journey	Reject the Average	Average Core Values Score	Productivity Score	Coaching Actions	Grade
Bob Barker	10	8	9	9	9	Grow Skillset	A-Player
Alex Trebek	8	8	8	8	8	Productivity Coaching	A-Potential
Vanna White	6	10	8	8	7	Core Values Coaching	B-Player
Pat Sajak	3	6	4	4	7	Performance Plan	B/C-Player
Richard Dawson	5	4	6	6	6	Terminate	C-Player

Observation - Likelihood of Change

o A-Player: 10-15% Chance of Decline (Role Outgrows Skill Set, Promotion to Incorrect Role, Major Life Event Occurs)

o A-Potential: 60% Chance of Becoming an A-Player

o B-Player 40% of Becoming an A-Player

o B / C: 60% Chance of Becoming an A-Player

o C-Player: 10-15% Chance of Becoming an A-Player

Exercise Four: Evaluation Template   15 minutes

Prepare an evaluation template so you are ready to discuss with your team members.

- Recognize and praise A-Players
- Coach B-Players to improve
- Commit to terminate C-Players*

* **Note:** *C-Players are the No.1 reason A-Players leave a business.*

Employee Evalutation

Name	Integrity	Client's Journey	Reject the Average	Average Core Values Score	Productivity Score	Coaching Actions	Grade

5. CELEBRATE SUCCESS

- When it comes to retaining A-Players, pay is a hygiene factor. Praise and recognition and working with other A-Players is what keeps them.

- What are some examples of creative ways that you celebrate success with your A-Players?

## Continue Your Learning
After Todays' Learning Event!

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LEADERSHIP USA Learning Library

Access additional self-study resources (eBooks, Videos, MP3s, articles, etc.) from our distinguished faculty members at LeadershipUSA.com/learning-library (use password **STRATEGIES**). Just click on the wheel to jump right to your desired skill!
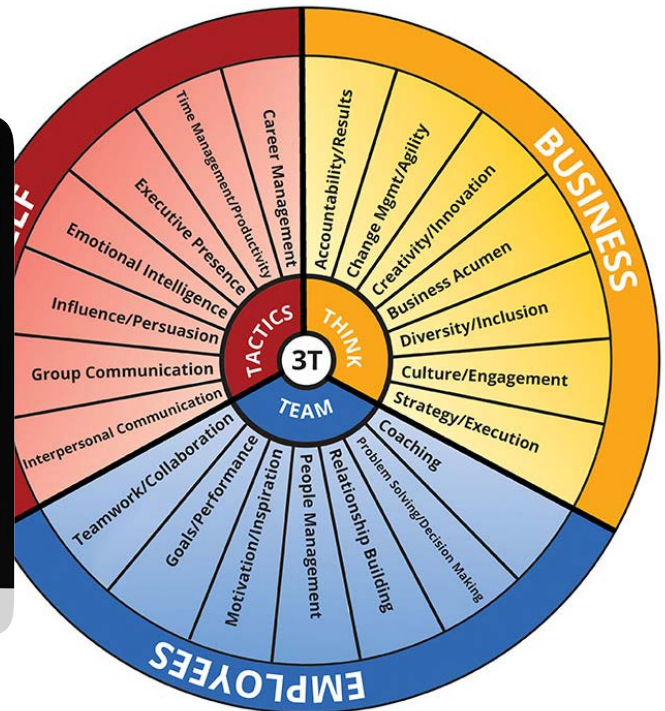
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Who Should Participate

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- Large Corporations with internal training departments who want to supplement their existing leadership development programs to "fill in the blanks" on performance improvement needs

- Larger Organizations that don't have internal training departments or an established leadership development program (who need an outsourced L&D function)

- Small-to-Medium Size Firms who need a consistent leadership development strategy for the senior leaders and managers in their organizations