

Katja Schäfer

Leadership made simple

WORKBOOK



Thank you

Thank you to everyone who inspired me to create this workbook. In particular the feedback from the participants in the annual program for new leaders “Leadership Made Easy” has allowed for continuous growth. Besides, many thanks to Ulrike Luckmann for her friendship and collegial support as well as with my mentee group at the German Speakers Association.

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Why this workbook was created



This workbook should do no less than change the world. Your world. The world of leadership.

It was in my early 30s that I found myself in my first role as a leader. Back then, I embodied the so-called “bulldozer mentality”. This meant that I always went full steam ahead, regardless of the consequences. My boss had big plans for me. At the time, it was my job to set up new branches of the company and breathe new life into those branches currently struggling.

This is how I found myself driving to the outskirts of Munich or neighbouring cities once a week, alongside my full-time job, to support new teams and whip existing ones back into shape. Any support from my supervisor whilst tackling this job singlehandedly was few and far between. But why would they be concerned? Each job worked out

and they got the desired result. Any issues were neither visible, nor of interest to them. I felt like I was being hung out to dry.

With a solid 300 hours overtime, a tinnitus and headaches in tow, I pulled the emergency brake and rescued myself, swapping the year of leadership responsibilities for a month of downtime in Malaysia.

The much-needed break took care of the tinnitus and I decided to start from scratch. All the support I needed, I received from fellow students in my part-time management degree. This group of individuals turned out to be my most crucial sparring partners. I had by far the most examples of real-life, practical implementation in my lectures and was led to question my approach and leadership style. I had managed to allow a multi-year project with funds of 500,000 Euros to go under. To understand all this, I decided to use my master’s thesis to evaluate my shortcomings in more detail.

After university, I embarked on my first coaching and training courses. Once again, I was able to directly apply freshly-acquired theoretical skills in my new job, supporting and advising young executives in their new roles. A dream job. Here, I could pass on all I had learnt from my own “bulldozer” times.

In these 5 years, I focused on three things:

1. That all employees in left-behind teams learned to enjoy their work again.
2. That my new mentees, who had the confidence to take on the role of a leader, do so with their own “leadership personality,” enabling authentic leadership, with a focus on people.
3. That I support them for as long as it takes to assure both sides that the leadership role will be taken on soundly and that my new colleague (always female managers, just to point out) is confident in their new role.

Since June 2019, I have been self-employed as a coach and mentor for the target group which I've come to care about most. They are those who are new to management roles, to whom I can pass on everything I missed back when I started out. I do so by providing practical support, help the personal application of simple, everyday tools 4 the pocket, and offer a step-by-step guide to creating your own authentic leadership personality.

We are all unique, wonderful people. We have no need to compare ourselves to others. We can, nevertheless, find suitable role models for ourselves, from whom we can learn.

Your personality is, therefore, the basis for successful, authentic leadership with ease. That's why you should "dare to be yourself" and choose the things from this workbook that fit you as an individual.

How to optimise this workbook for your needs

This workbook exists alongside the online course “Leadership made simple”. I have created it in a way that offers valuable support for your start into leadership even without the addition of the course.

Don't be put off by the numbers you might find beside the exercises. Example: Worksheet (M.1.1) simply provides the participants of the “Leadership made simple” course with orientation as to which exercise should be completed at a given time. Exercises highlighted in blue are integrated as an add-on for your use.

Tasks with this blue background are add-ons to the Mindstone Academy online

Brief explanation of the online course: Leadership made simple

First of all, to those of you already participating: have fun with this workbook! I'm looking forward to our next live call!

For all users of this workbook: the online course “Leadership made simple” was founded in the summer of 2021, and includes a total of 6 modules and plenty of extras that will provide you with comprehensive support on your journey to successful leadership. Take a look at my website: www.katja-schaefer.de and search for “courses”. Here, you will find a detailed description of what you can expect of “Leadership made simple”. Among the highlights are the monthly live calls as well as ongoing discussion and support from the community throughout. Of course, you have the option to speak with me directly before you decide whether the course is the best solution for you. If this sounds interesting to you, drop me a message and we'll go from there.

What is the workbook all about?

In this workbook, we build your individual leadership role house. This is a tool that I have been using for many years now when coaching new leaders and has proven its effectiveness over and over again. In every building block you will find simple tools which you can apply in your daily routine as a manager, whenever you might need them.

Why is it important to build yourself a house of roles?

It's quite simple: you exist only once in this world. You can imagine your house of roles to look like the most individually suited job description for your profile. Particularly when it comes to themes such as responsibility, stress management, or employee management, it is important to take a closer look at yourself. You will create your leadership personality and role so that it integrates your strengths, weaknesses, goals, visions, and individuality. This is the foundation of your successful self-management and proficient team leadership.

In this workbook and online course, you will learn how to build your house of roles.

Advice: work through this workbook chronologically.

Modules in the Workbook

1. **Kick-off:** success factors for proficient team leadership
2. **Modul 1:** Build your foundation: values, strengths, goals
3. **Modul 2:** Communication and network
4. **Modul 3:** Assignments and boundaries
5. **Modul 4:** Creating a framework, conquering change
6. **Modul 5:** Constructing a vision, internalising the culture
7. **Modul 6:** Conclusion: build your leadership toolbox

From this workbook, you hand-pick the knowledge and skills which will support you in your everyday role as a leader and your leadership personality. Decide freely, based on your needs, which tools you want to pack into your personal leadership toolbox at the end of the workbook.

The objective of our journey together is to achieve clarity and assurance for you in your role as a leader, to develop your own leadership personality and house of roles, and finally, to create your individual toolbox – suited to your daily needs.

At the end of the day, you are always your own expert. Best of luck and enjoy the workbook!

Yours truly,

A handwritten signature in black ink that reads "Katja". The signature is written in a cursive, flowing style with a large initial 'K'.

An overview of the Leadership role house or house of roles

In this workbook, we will successively **construct your house of roles**. It will help you not only define your individual leadership role but will be filled with your experiences so that the building blocks reflect your daily leadership life and personality. In the following modules, we will look at each building block in detail.

House of Roles



***»There was never any more inception
than there is now.«***

Walt Withman

Build your Framework!

Objectives of this Module

1. Understanding management and leadership
2. Your framework: values, the first building block of the house of roles
3. Defining your goals: the second building block
4. Defining your strengths: the third building block
5. Understanding and gathering implementation ideas: How does your framework relate to employee management?
6. Collecting tools 4 the pocket

1 MODULE

Understanding leadership and management

Management & Leadership

Management

Entails analytical skills for planning of organisation, structures, processes and capacities.

Leadership

Entails qualities like charisma, personality and skills such as the ability to motivate and persuade.

Key characteristics: interaction-based, influential, motivational

Why we differentiate between management and leadership

Management envelopes all tasks and responsibilities an executive must carry out in relation to organisation and administration. Leadership defines all the tasks and responsibilities centred around the individual and their character.

Why is differentiation important?

- If executives only “manage,” they run the risk of forgetting all tasks that are people-related; their employees are neglected over time.

Executives who forget leadership run the risk of:

- Retreating to their office, organising and getting caught up in operational issues
- Not knowing their employees or their skillset well enough
- Not knowing the general mood of the team

Executives who forget management run the risk of:

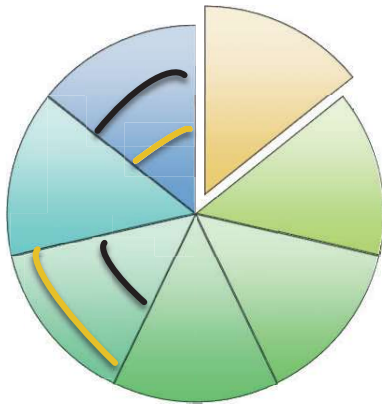
- Focusing solely on the people and, in the meantime, forgetting all tasks associated with numbers, facts and data.
- Failing to maintain an overview of cost plans, shift plans and holiday plans etc.

That’s why it is essential to:

- Include both perspectives
- Maintain an overview
- Consciously determine your priorities
- ...and if possible: delegate tasks from time to time – how, you will learn in no time. 😊

Tool 4 the Pocket: the Pie Chart*

Example of a pie chart of management and leadership tasks



Management tasks: (blue)

Organisation of meetings

Currently is (black): 8

Should be (yellow): 4

Leadership tasks: (green)

1:1 meetings with employees

Currently is (black): 5

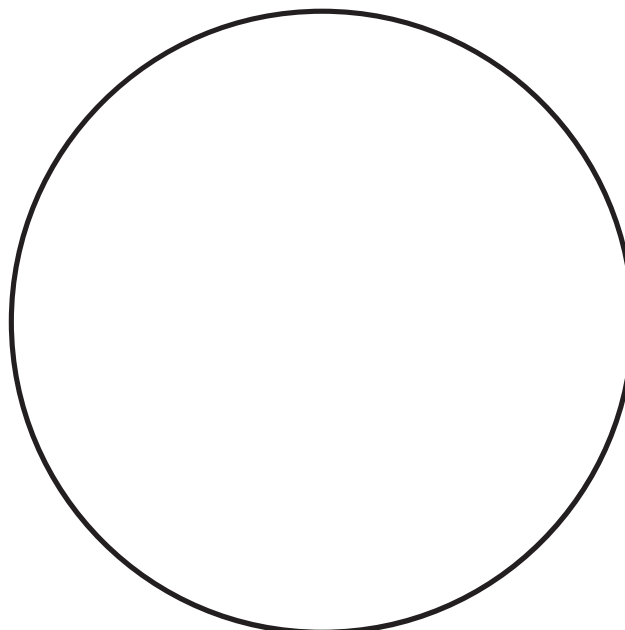
Should be (yellow): 7.5



* you will find a summary of all tools in the final chapter

Exercise: Create your Own Pie Chart

- Create your pie chart based on your regular tasks and categorise them as management or leadership. Highlight these different categories in different colours.
- Define your current state on a scale of 1-10
- Define your target state on a scale of 1-10
- Is there a section on the pie chart which you haven't even taken into account in your daily routine as an executive?
- Into which tasks do you want to invest more or less energy in the future?



Your Values Hierarchy

Your Framework: values, the first building block of the house of roles

The “framework” consists of three elements:



First we `ll have a look to your most important values



Caution!

Your “framework” is unique. Our values are the basis of our thoughts and actions. You are your own best expert.

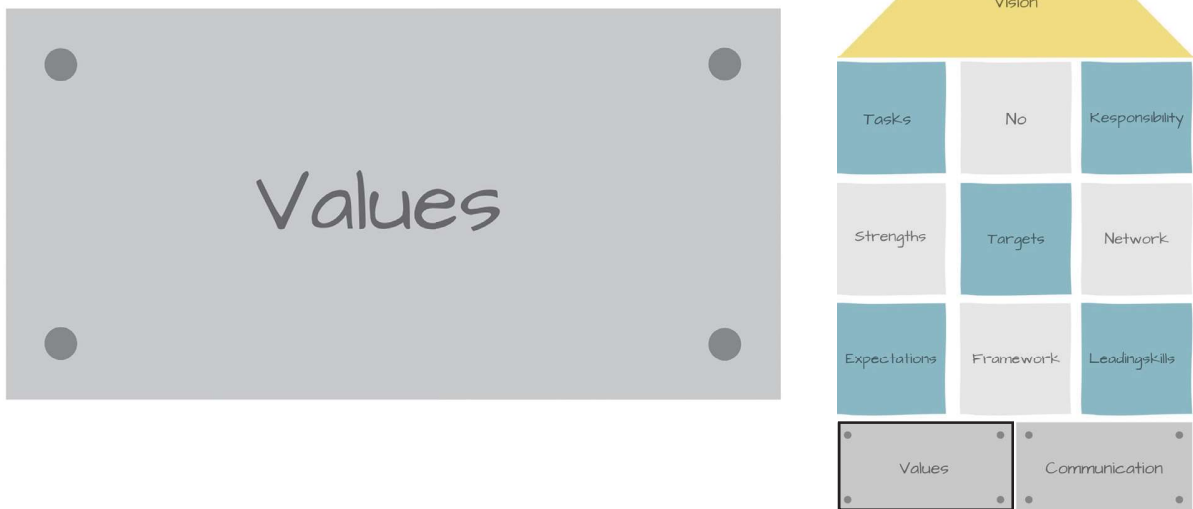
Why we differentiate between management and leadership

The first building block for your house of roles: your values

How are values related to leadership?

- Values define our leadership style.
- Values determine our treatment of others. Professionally as well as privately, with our team as with our supervisors.
- Abuse of our values is typically a cause of conflict; it is often accompanied by strange feeling of inner resistance.
- A mutual basis of values ensures understanding and good communication.
- In the best case, your values are in line with those of the team and the company.
- Conscious as well as subconscious values are reflected in the culture of a team and a company.
- It is, therefore, helpful to first be sure of your own values. This way, we can understand not only our own thoughts and handling of situations, but also that of the team and the company. As a result, we can optimise our communication and actions to suit these.

Construct your values building block



Explanation: when you have completed your values hierarchy, fill in your values on the building block. You can cut it out and use it to build your house of roles with the other building blocks at the end of the workbook.

Worksheet (M1.2) Build your hierarchy of values

For this exercise you'll need about 15 minutes

Step 1

- Choose your 10 most important values from the following table.
- Tip: assess the values on a scale of 1 (not important) to 5 (absolutely essential) first, and then choose your 10 most important ones.
- Determine these based entirely on your personal opinions, not as you think you would need to as a leader.
- Take around 15 minutes to complete this task.

Step 2

- Write down your top 10 values.

Step 3

- Put these 10 values into an order entirely personal to you.

Step 4

- Now choose the top 5 from your list and decide what they mean to you. Write these onto your values building block.

A sense of purpose	Effectiveness	Influence	Respect
Acceptance	Efficiency	Innovation	Responsibility
Activity	Empathy	Integrity	Security
Adventure	Enthusiasm	Intelligence	Self-confidence
Affection	Environmental conservation	Interest	Self-discipline
Agility	Fairness	Intuition	Self-realization
Altruism	Faith	Joy	Sense of duty
Appearance	Fame	Kindness	Sensitivity
Attention	Family	Learning	Serenity
Authenticity	Fitness	Lightness	Seriousness
Balance	Flexibility	Loyalty	Setting something in motion
Belonging	Foresight	Mindfulness	Sharing
Bravery	Forgiveness	Modesty	Sincerity
Camaraderie	Freedom	Motivation	Sociability
Caring	Friendliness	Neutrality	Solidarity
Charity	Friendship	Objectivity	Stability
Charm	Frugality	Openness	Stamina
Cleanliness	Fun	Optimism	Strength
Closeness	Generosity	Order	Success (professional)
Compassion	Gentleness	Origin	Superiority
Competence	Giving love	Passion	Sustainability
Confidence	Good mood	Patience	Sympathy
Consideration	Gratitude	Peace	Taste
Consistency	Growth (personal)	Perseverance	Team spirit
Contribution to the common good	Happiness	Personality	Tenderness
Control	Harmony	Pleasure	To be the best
Cordiality	Health	Politeness	Tolerance
Courage	Helpfulness	Power	Tradition
Creativity	Honesty	Pragmatism	Tranquility
Credibility	Honour	Precision	Transparency
Decisiveness	Hospitality	Presence	Trust
Democracy	Humanity	Professionalism	Truth
Determination	Humility	Propriety	Uniqueness
Devotion	Humour	Prudence	Validity
Dignity	Idealism	Punctuality	Vigilance
Diligence	Imagination	Realism	Warmth
Discipline	Incorruptibility	Recognition	Wealth
Distance	Independence	Reliability	Willpower
Education	Individualism	Reputation	Wisdom

Example: How to use the values framework in your leadership role

Look at all the points. With which of them can you identify? Find examples from your everyday life which fit to these points.

- You are able to argue more authentically should you need to achieve a goal that is not in line with your own values. Example: fairness is an important value to you. You do not want to give notice to your employee the way your superior would. A viable sentence in this example would be: Dear boss (...). Fairness and appreciation are my most important values. Because of this, I would like to avoid informing my new colleague of his termination via human resources. I would like to personally take on this responsibility. Is that okay with you?
- You develop a sense for why people act in certain ways and how a company handles its business.
- The awareness that the people you deal with may abide by different values to your own offers distance and calmness. This is important during conflicts when trying to understand the other person and to position yourself to do so, as all our values differ.
- Appreciation of your counterpart will feel much easier when you understand the background as to why people act and communicate differently.
- You can question your counterpart on their values to determine where they may overlap with your own. You can then decide on which values you would like build together, and, should you have a common goal, how you aim to achieve it together.
- If you know the values of your team and you define them as a group, you can give the team and the project significant power to achieve the goal and also provide considerable stability in times of crisis.
- You are able to go into meetings more relaxed and sovereign with those outside your level in the hierarchy.
- You are able to react in a calm manner when someone is trying to convince you of something you disagree with.
- You need to stay calm when facing challenges whilst also remaining authentic.
- When you want to introduce a new member to the team and need to figure out how well they will integrate into the team.
- When you want to understand a funny feeling – why something within you is disagreeing.
- When you want to understand why someone is behaving entirely illogical in your opinion, and want to figure out whether an overlooked value may be the cause.
- When you're looking to build a stable framework for teamwork, you are able to evaluate whether your values overlap with those of your potential partner.

Summary: Values

Values belong in the framework of your house of roles

- ✓ Our values have developed throughout our life and actively affect our thinking, actions, and our leadership style.
- ✓ Consciously defined values are an important building block in your role as a leader because they influence your leadership style.
- ✓ Consciously defined values can help you to understand yourself and others better. A violation of personal values may simply be what is hiding behind your employees' illogical reactions and thinking.
- ✓ If you know or can assume the values of your counterpart, you can adjust your communication to be on the same wavelength as them, especially important in critical situations. The more aware you are of your own values, the more confident and at ease you will be when facing challenges.



*»Often enough, all you need to see clearly is a
change of perspective.«*

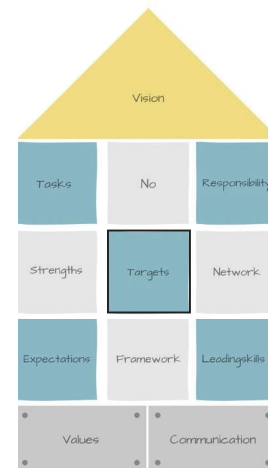
Antoine de Saint-Exupéry

Defining and achieving goals

The second building block: your goals

Why goals are important:

- Good goals lead to success
- Clear and mutual goals are the basis for good teamwork
- Unspoken or unclear goals hinder progress
- Strong goals motivate and lead to exceptional performance by you and your team



TOOLS 4 THE POCKET: define bullshit bingo goals

- Remove the pronoun “one” from your list of goals. Put it in the bin!
- Do not define your goals generally using “we” or “one”. Instead, use “I”.
- Do not soften your phrasing by using “would have,” “maybe,” “possibly,” “could,” etc.
- “I don’t want to...” There is no benefit in phrasing goals in the negative. Formulate them positively.

TOOLS 4 THE POCKET: the “Warning” sign

“Oh no! I’ve made the same mistake... again?”

The “warning” sign always appears when you catch yourself making a mistake and it will help you to positively confront your errors. It will also help you evaluate your decision-making and help you improve.

- Be kind to yourself and enjoy the process of getting to know yourself as a leader, evaluating your errors, and observing your own progress in becoming more professional. Consider mistakes an opportunity to improve.
- Catch yourself relying on poor habits when defining and achieving your goals.
- The “warning” sign assists you in learning to appreciate your “mistakes” and “weaknesses” with humour.

