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**Leading Phase I - Two Critical Questions**

**–Action Templates**

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| **Critical Question #1 – “Why?”**  **Potential Return on Investment (ROI)**  In identifying the potential ROI for the initiative, it is important to pull from as many domains as possible. The ROI is important not only at the beginning for justifying attention, effort, and resource allocation – it is also important over the course of the journey for reminding people why we are doing this – “what’s worth it?”  **Note.** This is a Word document, so it will naturally expand as needed – and it can be easily modified. And the two templates can be separated by cutting and pasting them if desired. |

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| **Domain** | **Potential Benefits** |
| **Moral Case**  For example, it’s the right thing to do, match America’s founding values, match religious values, etc. | √  √  √  √  √ |
| **Business Case – Internal**  Recruitment, retention, development/promotion, performance, innovation, decision-making, cross-boundary collaboration, etc. | √  √  √  √  √ |
| **Business case – External**  Market expansion, supply chain, customer relations, compliance, community standing, etc. | √  √  √  √  √ |
| **National Case**  Model “American Greatness” in taking on one of the toughest challenges, impact on GDP of closing gaps, redeploy resources from countering racism as gaps close, increased confidence and hope, etc. | √  √  √  √  √ |
| **Other** |  |

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| **Critical Question #2 – “How?”**  **12 Critical Success Factors (CSFs)**  The readiness template is designed to support focusing leadership actions. On which critical success factors (CSFs) do we need to act to be ready to lead? Where is our leverage?  These actions should “leap out” – they should be very evident upon reflection and conversation.  The intent is to identify the highest impact actions, not identify as many as possible.  **Leadership Leverage Scale**  1 = Little or no leverage here  2 = Some leverage – put some attention and effort here, but don’t undermine 3 & 4  3 = Significant leverage – put some serious attention and effort here  4 = Great deal of leverage – make this a leadership priority  **Note.** This is a Word document, so it will naturally expand as needed – and it can be easily modified. And the three templates can be separated by cutting and pasting them if desired. |

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| **Critical Success Factors (CSFs)** | **How We are Doing** | **Next High Impact Actions** |
| **1.**  **Answer the “Why?” Question** | 1 2 3 4 |  |
| **2.**  **Answer the “Why?” Question** | 1 2 3 4 |  |
| **3.**  **Make a Powerful Leadership Commitment and Build the “Web of Leaders”** | 1 2 3 4 |  |
| **4.**  **Put Clear and Compelling Plans in Place** | 1 2 3 4 |  |
| **5.**  **Establish the Organization or Community Architecture** | 1 2 3 4 |  |
| **6.**  **Build the Web of Leaders** | 1 2 3 4 |  |
| **7.**  **Prepare People for the Journey and for Success in the Desired Future** | 1 2 3 4 |  |
| **8.**  **Build the Competencies Required** | 1 2 3 4 |  |
| **9.**  **Connect People Through Communication** | 1 2 3 4 |  |
| **10.**  **Connect People Through Relationships** | 1 2 3 4 |  |
| **11.**  **Establish Healthy Accountability** | 1 2 3 4 |  |
| **12.**  **Align the Organization or Community** | 1 2 3 4 |  |
| **Notes:** | | |