The Legacy Leadership® Model

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LEGACY Leadership®

CERTIFIED MASTER FACILITATOR and INTERNATIONAL FACILITATOR CERTIFICATION TRAINERS:

Limitless Leadership International

PARTNERING FOR WHOLE LEADERSHIP

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CoachWorks® International
The LEGACY Leader® Company

What Is Legacy Leadership®?

Legacy Leadership® is the wisdom of the ages structured and packaged for today's - and tomorrow's - leaders. Its truths and Best Practices are timeless, proven keys to sustained significance and form the foundation for real-time legacy in today's business environment. Legacy Leadership® is a complete program—a philosophy, a process, and a model. Legacy Leadership® is not a leadership style—it is a life system and a way of "being," not just "doing."

This vital and highly adaptable model was developed as the result of over 40 years of the combined experiences of the CoachWorks® principals in individual, corporate, and organizational leadership development. Legacy Leadership® is more than a program. The founders of CoachWorks International have refined reliable, time-honored principles into an intentional, powerful system for success—today and tomorrow, for self and for others.

Are you living your legacy? "Legacy" is commonly defined to be something you leave behind when you're gone. What if you were living your legacy now? What if your vision for the future was evident in everything you do, every day? It can happen.

Drs. Lee Smith and Jeannine Sandstrom developed the Legacy Leadership® program as a result of their work with business leaders in all sectors. When they observed the most common behaviors of successful leaders, they identified the Best Practices that set outstanding leaders apart from their peers. When they listened to the deepest issues that were on leaders' minds, they were matters of legacy. The Legacy Leadership® program was developed as a map for ensuring excellence in leadership practices that would enable leaders to leave the legacy they intended.

CoachWorks® International has isolated, defined, and made transferable the practices common to leaders who are able to achieve and sustain success—with people, product, and revenue. Legacy Leadership® is based on 5 Best Practices which are common in all great leaders, whether it be the ancients whose successes leap from the pages of history, or the Fortune 500 leaders of today—and will be observed in the leaders of tomorrow.

> **"In my 22 years of management consulting, Legacy Leadership® provides the most comprehensive model of what leadership is really about that I've seen. Its power in diagnosis and improvement is much greater than other models that focus only on leader behavior."**
>
> *Dr. Jerry Fletcher, Author of PATTERNS OF HIGH PERFORMANCE*

Legacy Leadership® is a philosophy, a model, and a proven process for bringing out individual best, developing other leaders in the organization, establishing organizational leadership culture, and positively impacting the bottom line.

What Is Legacy Leadership®?

Current leader books and articles cover various aspects and techniques of leadership, but do not deliver a comprehensive model. Legacy Leadership® is a complete framework of practices, behaviors, attitudes and values that addresses every aspect of successful leadership.

LegacyLeaders® become students of leadership while focusing on building other leaders who build leaders, who build leaders…

We hear stories every day about the lack of strong leadership talent. Legacy Leadership® is a comprehensive model for developing such talented leaders. It includes competencies and practices with immediate applicability to almost every possibility and challenge leaders face today. These practices embrace both vision and accountability for results, as well as methods for creating an environment for team success, strong and dependable relationships, and maximizing the talents of diverse perspectives and strengths.

Many organizations have a set of competencies with which to measure their leader performance; others do not. In either case, Legacy Leadership® provides a sound structure for such competencies to reside. With the structural map of the 5 Best Practices, you have a full and complete picture of the destination of your leader development program, for you personally, and for those you lead. The basic focus of Legacy Leadership® is on OTHERS, rather than on the leader, in order to develop leaders who then develop other leaders. The outcome is fully developed leaders, both current and emerging, and a greatly enhanced leadership potential within the organization.

Legacy, in this model, is not about building things, but building people. It is about investing in individual leaders who then share what they have learned with others. Legacy is realized in this perpetuating cycle of leadership development by enabling your personal and organizational plan to come alive and thrive. Your best self is offered to others in order to develop their best selves and so on, leaving a multi-generational imprint—a living legacy.

Growing Tomorrow's Leaders…Today

The 5 Best Practices
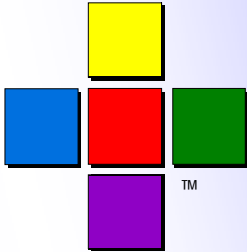
**Leadership Competencies and
Critical Success Skills—
The 5 Best Practices of Legacy Leadership®**

Given that leadership can be complex, we have simplified and distinguished five core competency platforms and associated critical success skills for successful leadership. These platforms represent a complete set of observable and measurable behaviors. The behaviors, when used in total, are leverage points for success. We have included those practices of leadership that are essential for every leader, regardless of their industry or level within the organization.

There are many leaders in our world, but only those who desire to grow their competencies will be the most successful, influential and effective leaders; and more importantly, leaders whom people desire to follow— LegacyLeaders®.

Now, like no other time in history, there is a need to develop strong leadership abilities. Using a model with proven success for both the best of times and worst of times, Legacy Leadership® embodies a compelling and comprehensive set of competencies and skills. LegacyLeaders® blaze the trail for others to follow to the edge of current development and beyond.

Legacy Leadership® is:

- A complete leadership program, addressing every aspect of successful leadership
- A plan that changes the culture of an organization from a command post to a community
- A method to actively grow tomorrow's leaders…today
- A hands-on, hands-together commitment to meeting mutual goals
- A set of practices to inspire and develop positive changes within any organization or individual
- A philosophy of leadership that encourages confidence, learning, wisdom, courage, insight and compassion
- A process to achieve personal best, team best and company best
- A framework of practices, behaviors, attitudes and values that energizes people and their organizations
- A balanced approach to people and production
- A way to reach great potential and possibilities
- A way to attract and retain high potential employees of diverse perspectives
- Simple, yet powerful. It works.

The Model

Legacy Leadership® is based upon five core competency platforms for successful leadership which we call *The 5 Best Practices*. Most major leadership models or approaches will find a fit within this balanced framework. We have included those practices of leadership that are essential for every leader, regardless of their industry or level within the organization. These practice areas form the context of the Legacy Leadership® Model.

1
Holder of Vision and Values ™

direction and commitment

2
Creator of Collaboration and Innovation™

the environment of working relationships

3
Influencer of Inspiration and Leadership™

connecting with individuals, the heart of relationships

4
Advocator of Differences and Community™

distinction and inclusion

5
Calibrator of Responsibility and Accountability™

execution and performance

www.CoachWorks.com

1

Holder of Vision and Values ™

(It's about direction and commitment)
ABILITY TO:
- *Keep vision and values clear*
- *Sustain focus and clarity*
- *Develop and execute strategy*
- *Establish the measurables*
- *Gain commitment to action*

2

Creator of Collaboration and Innovation ™

(It's about the environment of working relationships)
ABILITY TO:
- *Be creative and foster trusting environment*
- *Masterfully listen and facilitate*
- *Acknowledge the unknown and think beyond what is*
- *Gather perspectives and ask tough questions*
- *Discern need for change and project the innovative impact*

3

Influencer of Inspiration And Leadership ™

(It's about connecting with individuals, the heart of relationships)
ABILITY TO:
- *Build positive, meaningful relationships with energy*
- *Place leadership emphasis on people for positive outcomes*
- *Recognize, acknowledge and inspire others*
- *Enable others to lead through positive modeling*
- *Be humble, with a fierce resolve for each person's success*

4

Advocator of Differences and Community ™

(It's about distinction and inclusion)
ABILITY TO:
- *Be an advocate for people and raise their visibility*
- *Recognize strengths and build value*
- *Build diverse teams*
- *Promote an inclusive environment*
- *Recognize impact of business directions and communicate appropriately*

5

Calibrator of Responsibility and Accountability ™

(It's about execution and performance)
ABILITY TO:
- *Execute strategies well with implemented action plans*
- *Have vigilant awareness of progress towards goals*
- *Require peak performance, support and buy-in from all*
- *Have clear consistent accountabilities, follow-through*
- *Be aware of trends, adapt to change and recalibrate as necessary*

It's about the people.

LEGACY Leadership®

	Holder of Vision and Values™	Creator of Collaboration and Innovation™	Influencer of Leadership and Inspiration™	Advocator of Differences and Community™	Calibrator of Responsibility and Accountability™
BEST PRACTICE	**1**	**2**	**3**	**4**	**5**
DEFINITION	Leaders embody, hold out for all to know, company's vision and values. Vision and values spell out where company is going and the guiding principles by which they will operate. Leaders' behaviors are such that all work is organized around these 2 factors and leadership team, all performance measured against them.	Leaders supply environments where team members are comfortable enough to create possibilities greater than they would have alone. The group then discovers new practices, tool or products that changes or improves everything.	Leaders are "trail blazers" with a positive influence so that everyone is lifted up to be the best they can be. Participants are invited (not commanded) to contribute from strengths and are filled with energy to deliver high quality outcomes.	Leaders possess a mindset that all people have unique and compelling contributions to make. Leaders speak up for each person to forward that person's development and progress with the company.	Leaders who demonstrate personal standards of behavior and accountability, who provide clarity about expectations for results and who ensure measurement of progress toward the vision, with an eye for flexibility and mid-course corrections.
CRITICAL SUCCESS FACTORS	Must be in place: ■ Clear, compelling vision ■ Values statement ■ Business objectives ■ Strategic design ■ Roadmap and milestones ■ Communication throughout company of all above ■ Ways to measure all	Must be in place: ■ Creative environment ■ Commitment to innovation ■ Processes for collaboration ■ High levels of trust ■ Process of capturing outcomes	Must be in place: ■ Positively inspired leaders ■ Abilities and processes to engage others from strengths ■ Personal connections ■ Stories that inspire	Must be in place: ■ Processes for identifying strengths and styles ■ Comfort with differing perspectives ■ Practice inclusion vs exclusion	Must be in place: ■ Calibration processes vs discipline ■ Measurements and rewards ■ Measurements against roadmap and milestones
BARRIERS TO SUCCESS	What prevents success? ■ Lack of commitment ■ Missing Communication ■ Lack of Measurements ■ Focus on short term activity vs long term commitment ■ Lack of modeling of values by leadership	What prevents success? ■ Mindset for change avoidance ■ Lack of trust ■ Lack of inspiration by leader ■ Lack of methods for discovery ■ Fear of creative tension	What prevents success? ■ Focus on numbers not people ■ Not knowing what influences ■ Fear or mistrust ■ Previous history with the influencer	What prevents success? ■ Belief systems and biases ■ Stereotyping ■ "Rubber stamp" mentality ■ Avoidance of vulnerability ■ "Us against them" thinking	What prevents success? ■ Leader not holding self or others accountable ■ "Either/Or" thinking ■ Qualifiers that diminish ■ Exclusion of customer in the measurement mix

LEADERSHIP MODEL	ORGANIZATION, PROFESSIONAL, OR BOTH	FOCUS	GOAL	ISSUES COVERED									
				Vision	Values	Collaboration	Innovation	Inspiration	Influence	Differences	Community	Responsibility	Accountability
Smith/ Sandstrom: Legacy Leadership	Both individual and organization	The "who" of the leader and the "what" of behavior. Based on a comprehensive set of 5 Best Practices: 1. Holder of Vision and Values 2. Creator of Collaboration and Innovation 3. Influencer of Inspiration and Leadership 4. Advocate of Differences and Community 5. Calibrator of Responsibility and Accountability	To create a multiplication effect where leaders develop leaders, who develop leaders, who possess strength and agility to direct the organization to high levels of competition, profitability, and commitment to service of others.	X	X	X	X	X	X	X	X	X	X
Kouzes/ Posner: The Leadership Challenge	Individual development as he/she impacts the organization	Leader abilities 1. Challenge the process 2. Inspire shared vision 3. Enable others to act 4. Model the way 5. Encourage the heart	To develop behaviors to serve as a basis for learning to lead.	X	X	X	X	X	X	X		X	
Covey: Principle-Centered Leadership	Individual leaders	Principles on which to base leadership: 1. Alignment 2. Empowerment 3. Trust 4. Trustworthiness	To practice leadership from perspective of 4 "true north" principles	X	X				X			X	
Nanus: Visionary Leadership	Individual leaders	Helping to develop the right vision	Guidance for leaders to develop vision and strategy	X	X								
Greenleaf: Servant Leadership	Individual leaders	On the being of the leader and his/her highest priority of serving others	To serve first, lead second	X	X				X		X	X	
Ball: DNA Leadership	Individual leaders and Organization	Goals are the transforming agent that creates a DNA culture	Using DNA fabric to guiding and growing the Goal-Driven organization	X	X		X	X					
Oakley/ Krug: Enlightened Leadership	Both leaders and organization	Right vision while leading organization members to accept ownership for it and commitment to implement vision	To inspire others to act and developing other leaders	X					X			X	
Blanchard: Situational Leadership	Individual professional	Leadership style people need to be successful at what they are doing—Three stages of change based on situational need: Starting and orienting the journey Change and Discouragement Adopting and Refining Empowerment	Re-orients leader style based on evaluation of situation. Focuses on diagnosis, flexibility and partnering.	X	X	X				X		X	X

Expected Outcomes

	BEST PRACTICE		ORGANIZATIONAL (Your Company)	PROFESSIONAL (Your Leader)
1	**HOLDER**	**VISION**	▪ Clarity of focus ▪ Strategic implementation against vision ▪ Consistent communication about focus	▪ Reminds people of what's important ▪ Clear alignment with followers ▪ Brings whole self to leadership
		VALUES	▪ Reputation of a company with values ▪ Congruent guiding principles in the culture ▪ A culture of integrity	▪ "Walks the Talk" of personal core values ▪ Has meaning and purpose for efforts ▪ Models authenticity
2	**CREATOR**	**COLLABORATION**	▪ Fosters environment of trust and loyalty ▪ Breaks down "silos" ▪ Creates flexibility and adaptability	▪ Puts ego aside to hear brilliance of others ▪ Builds teams and networks ▪ Brings out best, asks tough questions
		INNOVATION	▪ Creative energy for competitive advantage ▪ Fast learning ▪ Environment of thought leadership	▪ Enhanced personal creativity ▪ Ability to shift quickly, personal agility ▪ Embrace change as opportunity
3	**INFLUENCER**	**INSPIRATION**	▪ Highly motivating environment ▪ Encouragement to bring whole self to work ▪ Employees feel valued for contribution	▪ Is both inspired and inspiring ▪ Passionate with focused energy ▪ Models that work is FUN
		LEADERSHIP	▪ Develops emerging leaders at all levels ▪ Links leadership with strategic plan ▪ A systems focus on leadership practices	▪ Stretches to be the best ▪ Leader competencies developed ▪ Has a "platform" for actively mentoring
4	**ADVOCATOR**	**DIFFERENCES**	▪ Is a "connoisseur" of talent ▪ Taps abilities of ALL, including "fringes" ▪ Reduced turnover, greater retention	▪ Discovery of own uniqueness ▪ Finds own distinguishing strength set ▪ Learns from those who are different
		COMMUNITY	▪ Reputation attractive to employees ▪ Greater commitment to community ▪ Greater sense of authentic purpose	▪ Gets voice heard while hearing others ▪ Releases old biases, is inclusive ▪ Makes alliances between leader and led
5	**CALIBRATOR**	**RESPONSIBILITY**	▪ Right people in right jobs ▪ Optimized strengths ▪ Consistent standards	▪ Is the right leader for the job ▪ Produces excellent results, value added ▪ Requires everyone's personal responsibility
		ACCOUNTABILITY	▪ High level of achievement ▪ Measurable outcomes ▪ Loyal customers	▪ Holds self and others accountable ▪ Communicates expectations ▪ Calibrates regularly and consistently

The Legacy Leadership® Institute

An intensive 3-day workshop including:

Reorient around a new definition of excellent leaders:

"those who embody deep personal humility and fierce resolve, influencing success which is felt long after they move on."

—Jim Collins, author of <u>Good to Great: Why Some Companies Make the Leap...and Others Don't</u>

- Thorough hands-on study of Legacy Leadership® and the 5 Best Practices
- Field Guide with resource information about Legacy Leadership® and the 5 Best Practices, behavior shifts, expected outcomes, inhibitors to concept application, development plans and extensive library list
- The Learning Journal, an extensive binder with Institute worksheets and supplemental information
- Legacy Leadership® Competency Inventory (LLCI)™ a self-evaluation assessment instrument for determining current behaviors and action planning
- Innovative approaches to experiential learning, including group case study work and creative exercises
- Extensive activity-based concept applications
- Concepts reinforced with fun
- Follow-on coaching for reinforcement of permanent shifts in behavior

Institute benefits:

- Realize permanent shifts in leadership behaviors to influence others and develop excellent leaders who develop excellent leaders
- Adopt a leadership philosophy instead of a prescription that will have lasting and far-reaching results
- Learn how to maximize your personal and professional potential through a process that grows both the organization and the individual
- Determine how to attract and retain high potential employees of diverse perspectives
- Participate with a community of leaders making the same life changing shifts who will become valuable resources for encouragement and continued collaboration

Legacy Leadership® is available in the following versions:

- **Legacy Leadership®, Business Model***
- **Legacy Leadership® for Educators***
- **Legacy Leadership® for Community**
- **Legacy Leadership® for Kids**
- **Legacy Leadership® Faith Version**
- **Legacy Leadership®, French* and Korean— Business Model**

*(*Full Institute and all materials available. Other versions limited materials only.)*

In addition to the 3-day Institute, CoachWorks® also offers a 1-Day Institute, a comprehensive 13-session TeleClass, and customized presentations for organizations as well as complete online automated 360 Feedback Assessment Tool Services, Executive Coaching around organizational initiatives and feedback results (see next page), and many other associated standard and customizable services and materials for leadership development. Contact CoachWorks® for more information (info@CoachWorks.com).

The Legacy Leadership®
Competency Inventory
360 Feedback Tool
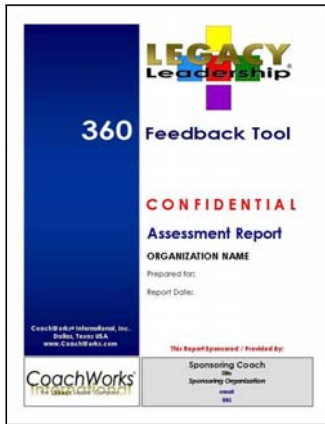
One of the advantages of the Legacy Leadership® Competency Inventory online 360 Feedback service is that the entire process is completely monitored and administered by CoachWorks®. Exceptional care is given to be sure all raters file in correct categories, so that the resulting report is accurate by category. CoachWorks also stands by to troubleshoot or answer any questions which might arise during the process, from either raters or sponsoring individuals. The ability to customize the comments section is also a helpful advantage. The 30+ page report generated is complete, accurate, and contains everything needed to properly interpret results and provide powerful coaching information for clients.

Online Assessment Service

A comprehensive 360 feedback tool for self- and 360 assessment, based on the 10 Critical Success Skills for each of the 5 Best Practices. 50 questions are answered by the participant and by selected bosses, peers, direct reports and customers (if applicable). This is a **DUAL factor inventory**, which means that the raters are asked to rank the person for both PERFORMANCE and EXPECTATIONS of performance. Raters also have the ability to make comments, as desired, and/or as directed (customized questions). The assessment is taken online. CoachWorks administers the online 360 program, providing complete instructions, passwords and oversight during the assessment process. After all raters have completed feedback, a complete confidential/security protected report (in PDF format) is generated for the participant with full-color graphs. The report includes helpful information for interpretation and coaching and very detailed tables showing hidden strengths and blind spots. The system will handle an **unlimited number of raters** in each of the 360 categories (boss, peer, direct report, customer) and one self-assessment per report.

The LLCI 360 Feedback tool, both pre and post assessment, provides a method of determining increased levels of performance in order to track return on investment and commitment to leadership growth.

This assessment service also provides the ability for raters to make extensive comments. If desired, the **360 can be customized** to ask specific targeted questions for the participant and/or organization. Customization can include rated questions (reported with graphs as standard assessment questions) or standard response/comment questions. If an organization has a set of competencies, these can be put in a ratings format at the end of the standard 360. Customization is available in many options. If this is desired, please contact CoachWorks directly (this cannot be arranged at the website).

CORPORATE/ORGANIZATIONAL USE

This 360 assessment service is available for both individual and corporate (facilitated) use. Individuals may use this service for personal/professional coaching purposes. Organizations may choose to provide feedback for certain groups of people (teams, leaders, managers, etc.). This is what is called "facilitated corporate use." A certified Level 1 user or Level 2/3 facilitator of Legacy Leadership is required to facilitate such a program. CoachWorks will still administer the program, but results will be sent to the Legacy Leadership facilitator for interpretation, coaching around the results, leadership development, etc. CoachWorks International can also provide coaching services around the 360 feedback results, as well as leadership development programs for Legacy Leadership. If you are interested in CoachWorks International assistance in organizational programs involving the 360 feedback process, please contact CoachWorks at info@coachworks.com for more information.

Group Composite Report also available.
The group report shows the level of leadership competency for a team (averaging all ratings). It serves as a diagnostic if there are gaps in leadership abilities. It is an invaluable feedback tool for the group as a whole.

Contact CoachWorks or visit the CoachWorks webstore for pricing.

CoachWorks® International, Inc.

As pioneers and leaders in the Executive Coaching profession, CoachWorks® coaches are uniquely positioned to work with leaders who want to accelerate their effectiveness and sustain organizational vitality. Our mission is to create, inspire and coach *LegacyLeaders*® who in turn are transforming their sphere of influence and creating legacy communities with stakeholders who achieve their best.

Founded in 1995, CoachWorks® International is an acclaimed worldwide provider of leadership development services. Its coaches are thought leaders in the profession of executive coaching. They coach key leaders through change implementation until the change becomes the sustainable new way of working.

Development Methodology for Legacy Leadership®

Legacy Leadership® was developed by Dr. Lee Smith and Dr. Jeannine Sandstrom, based on over forty years of combined observation and experience with leaders, leadership programs and the use of other models. In working with hundreds of leaders, behavioral indicators for successful leadership practices were identified. Over time, more than 150 leadership skill sets were reduced to the 50 critical success skills that support the definition of Legacy Leadership®. Background validity included review of research and statistics about leadership, review of practices, extrapolation from the statistics, and anecdotal evidence in the leadership literature, as well as our own work.

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For more information about CoachWorks® International, our principals, products and services, please contact us.

For more information about Legacy Leadership® training events, please contact these certified facilitators.

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