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LEADERSHIP PLAYBOOK

Your ~~Survival~~ Success Guide to
Career-Critical Activities

CREATE THE CAREER THAT YOU WANT, ONE PLAY AT A TIME





TABLE OF CONTENTS

INTRODUCTION

Lead In Your Career - Start Here

- 1) PULSE SURVEY
- 2) CAREER OBJECTIVE SETTING
- 3) LEAD GOAL-SETTING DISCUSSIONS

Leading Self

- 4) LEAVE WORK AT WORK
- 5) BOUNDARY SETTING CHECKLIST
- 6) DECISION-MAKING PROTOCOL
- 7) RIGHT-ON-TIME RESET

Leading Others

- 8) LEADERSHIP STYLE PROFILER
- 9) LAYOFFS SURVIVAL GUIDE
- 10) MAXIMIZE PERFORMANCE REVIEW

IMPLEMENTATION SUPPORT



INTRODUCTION

THE LEADERSHIP PLAYBOOK

Business is evolving at an extreme rate, the likes of which we have never seen in our lifetime. The level of stress, distraction, and overwhelm is unprecedented. An unintentional approach to our careers in this age would lead to an aim of merely surviving our high-stakes, high-powered work and enduring our day-to-day lives.

You were meant for more. This moment can become the greatest opportunity to lead in your career, to have the impact you dreamed of, and to truly enjoy the journey. Your unique set of skills and experience has prepared you to leave a significant impact through your work. It's time to design your work on your terms to thrive in this exciting time in business.

DESIGNED TO THRIVE IN YOUR CAREER

We may feel committed and willing to do what it takes to create more success and satisfaction in our work, but we feel at a loss at *what* to do in order to make it so. "If only there were a playbook to follow..." Enclosed you will find a blueprint for significant moments in any business leader's career that can be crucible moments to catapult your success and boost your satisfaction. Turn to it when you feel inspired to elevate your impact by implementing strategies and perspectives that work.

Choose to begin with the tool that is most fitting for your current situation or, when in doubt, begin with the section entitled "Start Here". Remember this Playbook is meant for action and results, so do not move on without implementing the steps on the page.

Let's begin.
Cheri



PART 1

PULSE SURVEY

ASSESS CURRENT SUCCESS & SATISFACTION

Beyond your organization's engagement survey, I invite you to pause to take stock of your career and life - what is going great and what is not. This pulse survey is the first step to creating a better future. Use a 10 point rating scale to assess where you are now and what to you want to change next to bring you closer to where you want to be.

CAREER

WORKING WELL

Consider these dimensions:

- Content of work
- Level of work
- Level of skill
- Level of rewards
- Level of job security

NOT WORKING

Consider these dimensions:

- Content of work
- Level of work
- Level of skill
- Level of rewards
- Level of job security

DO DIFFERENTLY

What I will

- think
 - feel
 - do
- differently to achieve the different results I want next

HEALTH

WORKING WELL

Consider these dimensions:

- Physical fitness
 - Nutrition / Hydration
 - Movement
 - Sleep
- Emotional wellness
- Spirituality

NOT WORKING

Consider these dimensions:

- Physical fitness
 - Nutrition / Hydration
 - Movement
 - Sleep
- Emotional wellness
- Spirituality

DO DIFFERENTLY

What I will

- think
 - feel
 - do
- differently to achieve the different results I want next

RELATION -SHIPS

WORKING WELL

Consider these dimensions:

- Partner
- Children
- Friends
- Family
- Community

NOT WORKING

Consider these dimensions:

- Partner
- Children
- Friends
- Family
- Community

DO DIFFERENTLY

What I will

- think
 - feel
 - do
- differently to achieve the different results I want next

CAREER OBJECTIVE SETTING

OBJECTIVES FOR YOU, BEYOND YOUR BUSINESS

We have built out processes to set business objectives, but often overlook our own careers. This contributes to days, quarters, and years passing with progress in our business, but not in our career. Set specific goals for yourself across these 4 dimensions now, using those included as inspiration that you might choose from. If you completed your Pulse Survey, consider these as goals that would bring you to a rating of "10" in each area, once achieved.

INCREASED EXCELLENCE

- Performance ratings
- Business results generated
- Expanded impact
- Skill mastery
- Prioritization
- Swift decision making
- Compelling personal branding
- High-ROI calendar design

INCREASED EASE

- Honor ideal schedule of working hours
- Intentional breaks to recharge
- Blocked time for deep, strategic work
- Resolve internal conflict
- Lead effectively and manage horizontally
- Resolve interpersonal conflict
- Routines for better wellness
- Work / Life synergy

INCREASED EARNINGS

- Manage up
- Promotion of title
- Compensation target
- Content of work
- Scope of role
- Size of team
- Autonomy
- Flexibility

INCREASED ENJOYMENT

- Time off targets
- Travel plans
- Hobbies
- Protected quality time with others
- Clarified purpose
- Increased fulfillment
- Active management of mindset
- Curated experience of work / life

LEAD THE DISCUSSION GOAL SETTING

AS A LEADER AND CONTRIBUTOR

If you lead a team, you are holding these discussions with your team members, but you are also meeting with your people leader as a contributor. Resist the temptation to people-please, presume it's not worth the effort, or that everything is obvious. Use both sides of the page to prepare for your respective roles and maximize the impact of this annual discussion. Set the tone for year-end results now!

LEADER

THE MISSION

Explain to your team member how they can be successful, holding the belief that they can and will do it

ACTION PLAN

- Explicitly state all goals and ways of delivering required to meet expectations
- Make sought after outcomes objectively observable so nothing is left to interpretation
- If feedback from stakeholders on the manner in which they delivered these results are important, note it
- Set the system for checking in on progress throughout the year - the format, forum, frequency
- Clarify the responsibility lies with the team member to push updates to meet these expectations
- If the bar has been raised, be crystal clear about what this team member must do to meet expectations in this new paradigm
- Sell the team member on why these goals are important to the organization and to their career

CONTRIBUTOR

THE MISSION

Know how to be successful in your role, how to recognize success, and meet or surpass expectations

ACTION PLAN

- Use this conversation to gauge where you stand on career goals too, including promotion, compensation, shifting scope, etc.
- Ask for what you want by setting it as a goal for this year
- Frame it in a business-first benefit to the organization manner, i.e. your impact grows and then your career grows, what's in it for your leader
- Ask how feasible your leader believes that timing is
- Ask what other goals you need to have to make it happen
- Propose your ideas for how to achieve your goals for their feedback
- Give your leader something thoughtful to react to
- Ask if there are opportunities or exposure that you should be raising your hand for

PART 4

LEAVE WORK AT WORK

THE BUSINESS CASE FOR ENJOYING TIME OFF

When you are off from work for the holidays, vacation, a weekend or a weeknight, a flurry of festive activity may be happening around you, but may be somewhere else...

...still replaying that misstep at work, or lamenting the missed sales target for end of year, or experiencing PTSD on that tough performance review you had to deliver, or worrying about how the reorganization will play out for you, or dreading the layoff you have to communicate soon, or feeling the weight of the expectations on you and your team, wondering how you will get it all done., and a million other things from the office that are occupying your mind...

while the people you love the most are right there next to you, so you smile half-heartedly, or get another glass of refreshments to lighten up, or get lost in a screen to forget, or unload your work drama on an unsuspecting relative, or step outside for fresh air just to try to center yourself and get back in the moment.

Follow this protocol to remind yourself of the clear case for true rest, then practice the mindset that will enable you to follow through on these actions.

CLARITY

- **Logic** - rest and recharge fully to perform better upon your return
- **Empathy** - do it for the people you care about, to deeply connect with those whom you value more than achievement
- **Authenticity** - do it for the future you to avoid regrets of not living a full life alongside a successful career

MINDSET

- **Sustainable Success** - is the true goal, because burnout is bad for careers and bad for business
- **Delegating** - shares opportunity and scales your impact through others
- **Maintenance Routine** - like any asset, and every person, you require maintenance to perform your best

ACTION

- **Set Boundaries** - Advise when available and when offline, emergency contact method, who to contact in your absence
- **Mindful Relaxation** - Interrupt the cortisol / dopamine roller coaster ride to decompress
- **Tie Workday In A Bow** - Close your day noting the top 3 priorities to pick up on tomorrow

BOUNDARY SETTING CHECKLIST

GOOD FOR YOU, COLLEAGUES, & THE BUSINESS

Boundaries allow you to make decisions ahead of time that keep you performing your best, so that your value-add is sustainable and your time is spent on the highest priority, highest ROI activities. Clear expectations prevent surprises and grow your impact. These examples can be tweaked to fit the standards that you are ready to put in place. Each takes on a specific challenge, poses a question, and offers a draft boundary in the form of an "If... / Then I..." statement.

TIME

PHONE CALLS

- 1.C: Constant phone interruptions
- 2.Q: Who will I pick up the phone for?
- 3.I/TL: If someone who is not on my list of VIPs calls while I am working on my top priority, then I will let them leave a message so that later I can decide when to respond after evaluating against my current priorities

REAL-TIME

- 1.C: Spending much time responding to messages, emails, and visits from colleagues on their timeframe
- 2.Q: What is the best use of my time?
- 3.I/TL: If someone wants to reach me when I am advancing my top priority, then I will respond when I am free.

ADMINISTRATIVE

- 1.C: Drowning in overhead tasks
- 2.Q: How will I prioritize deep, strategic work in my day?
- 3.I/TL: If I have overhead or administrative tasks to be done, then I will schedule them after my protected time for deep work on strategic tasks that move our business forward.

BACK-TO-BACKS

- 1.C: I loathe being in back to back meetings, but that is every day
- 2.Q: Am I willing to break the habit of accepting all meetings?
- 3.I/TL: If I receive meeting requests not in my working hours, or without a clear agenda, or not a good use of my time, or that conflicts with holds for deep work / breaks, then I decline.

OTHERS

WORKLOAD

- 1.C: Assigned increasing amounts of work
- 2.Q: Which asks will I say yes to?
- 3.I/TL: If I am asked to take on a new task, then I will note to my leader which one of my current responsibilities will be stopped or slowed in order to accommodate, and my stack rank of priorities & timeframes.

SHIFTING FOCUS

- 1.C: We don't stick with one priority through completion around here
- 2.Q: How do I want to let changes in priorities impact me and my work?
- 3.I/TL: If priorities are changed from above, then I will point out the cost / benefit of doing so. If it holds, then I will disagree and commit.

VENTING

- 1.C: Drained from others' venting
- 2.Q: Am I here to make people comfortable or make things better?
- 3.I/TL: If someone starts to vent to me, then I will respond with "I could see how you could feel that way, what can you do next to make things better?" later followed by, "I've got to get back to work."

CONFLICT

- 1.C: I am spoken to unprofessionally with a raised voice
- 2.Q: What behavior will I tolerate?
- 3.I/TL: If someone speaks to me unprofessionally, then I will end the conversation by noting "When you are ready to speak to each other respectfully so that we can partner to help the business, we can discuss then."

PERSONAL

CATCHING UP

- 1.C: I have to catch up on work at night and on weekends
- 2.Q: When will my working hours be enough?
- 3.I/TL: If I have more to do at the end of the day, then I set my priorities to pick up the next morning and I rest until then. If I am given more work, then I still only work X hours a day.

SELF-CARE

- 1.C: My work is so important that I can't take care of myself, there is no opportunity to fit it in
- 2.Q: What self-care is non-negotiable to keep me performing at the highest level?
- 3.I/TL: If I am due for health appointments, meals, and breaks, then I take them to work at my best.

MISSING OUT

- 1.C: My work is so demanding that I miss important milestones for my spouse or children
- 2.Q: At end of life, will I have wished I worked more and skipped that personal event?
- 3.I/TL: If I have a milestone for a family member, then I shift my work so that I can be present for that event.

TIME OFF

- 1.C: I don't take my time off because it's too painful to catch up when I return and what's the point because even when I am off, I am working
- 2.Q: What else is important to me in life beyond work?
- 3.I/TL: If I take time off, then I delegate to others to cover me until I return.

DECISION -MAKING PROTOCOL

ASSESS. DECIDE. COMMIT.

Here is my simple, battle-tested framework to make decisions faster and love your reasons for making them. Use this process when facing any meaningful decision. If you arrive at a decision before completing all of the steps, proceed. This is an exhaustive framework to ensure you reach clarity and commit to making the decision right.

1 OPTIONS OUT

- List all viable options.
- Identify options you hadn't thought of yet.
- Define pros and cons 1 year and 5 years out.
- Estimate the probability of each outcome.

2 PRIORITIZE

- Define your criteria.
- Stack rank based on what is most important to you.

3 WORST-CASE

- Name the worst case scenario.
- Decide how you would handle it.
- Realize you would be okay.

4 CONSTRAINTS

- If time and money were not an issue what would you do?
- If no one was watching what would you do?

5 INNER WISDOM

- If you choose option A, what would option B want you to know?
- And vice versa?
- Is there an option C with the best of both?

6 FUTURE SELF

- Imagine your future where everything worked out the way you dreamed.
- What would that version of you tell you to do here and now?

7 DECIDE

- Set a deadline.
- Make the decision.

8 TAKE ACTION

- Send the message.
- Book the meeting.
- Sign the document.

9 MAKE IT RIGHT

- Commit fully.
- Create momentum.
- Build confidence through action.

RIGHT-ON-TIME RESET

RESET EXPECTATIONS TO WORK YOUR BEST

Use this exercise to prime yourself at the start of the work day, when assessing your career progress, or any time that you feel yourself rushing and hurrying to advance your career.

The purpose is to calm your nervous system so that you are clear-headed to be creative, innovative, and able to spot opportunities to grow and progress. This reset will enable your best performance and will ensure you have higher satisfaction at every step of the way.

RESET QUESTIONS

How am I right on time within the bigger picture?

- How am I meant to be exactly where I am at this moment for my best interests?
- What are all the ways that “all is well” right here and right now?
- What are all the things that are going right?
- How are things coming together in my favor?
- How am I better off because of what just happened?
- How do I have everything I need in this moment?
- How is where I am now more than enough?
- What are all the ways that I am competent?

What benchmark am I using to assess my progress?

- How have I progressed when I look back to where I was before?
- What am I learning?
- How am I growing?
- What am I learning?
- How is what I have accomplished enough for right now?

Why do I choose my current role today?

- What are the benefits to me?
- What are my reasons for showing up?
- What is in my control right now?
- Why does this make perfect sense as my decision today?

RESET BELIEFS

I am right on time and all is well.

- It takes as long as it takes.
- I'm exactly where I am supposed to be because this is where I am
- It's time to accept what's happening now and recognize all the good in this moment
- I decided I am going to enjoy every step as if it were done even before it is.

I measure progress against where I was before.

- If I want to move forward, the fastest way is from where I am now
- Practice makes progress.
- I'll be learning and growing my way to that goal.

I am free to make the choice that is best for me daily.

- Every day I choose what has the highest ROI for me.



LEADERSHIP STYLE PROFILER

KNOW AND ENGAGE YOUR AUDIENCE

Which leadership style do you lead with? Which describe your key stakeholders? Once you know your audience, it's time to effectively engage stakeholders based on their style. Incorporate their preference for learning, listening, and processing information for best results. This is how we hold the room.

STRATEGIC VISIONARY

STRENGTHS

- Big Picture
- Charisma
- Innovative

AVERSIONS

- Logistics
- Timelines
- Structure

MOTIVATE

Creativity that sparks intellectual curiosity, paint the vision

MODE

Kinesthetic - Action-oriented, experiential demo

RATIONAL THINKER

STRENGTHS

- Logical
- Analytical
- Data-Driven

AVERSIONS

- Distraction
- Emotion
- Enrolling Others

MOTIVATE

Arrive at a logical conclusion using measurable evidence

MODE

Quantified - Data analysis and specs of inputs & outputs

EMPATHETIC CONNECTOR

STRENGTHS

- Emotion
- Inclusion
- Relationships

AVERSIONS

- Business Case
- Conflict
- Change

MOTIVATE

Establish buy-in and consensus caring for the impact to people

MODE

Auditory - Talk it through together with room to reflect

ORGANIZED MANAGER

STRENGTHS

- Planning
- Execution
- Details

AVERSIONS

- Brainstorming
- Chaos
- Uncertainty

MOTIVATE

Controlled implementation with milestones

MODE

Visual - Share the plan and offer reference material

LAYOFF SURVIVAL GUIDE

LAYOFFS AS OPPORTUNITY

As the manager, colleague, or impacted employee, there is a way to thrive during periods of layoffs or reduction in force. Most will see this as an unfortunate situation to be ruminated in at length with remorse for employees lost. Instead, use this natural lifecycle for mature businesses to work in your favor.

AS MANAGER

When asked to meet a cost savings target, you can explore how to achieve savings without layoffs, such as reduction of general and administrative expenses. If staff reduction is the only option, consider this as a new constraint on your business. Evaluate the roles and the talent in the roles. Role elimination or consolidation is one option. Eliminating individual talent due to relative contributions or to replace with more junior, less expensive talent is another. Own the difficult tradeoff decisions to preserve the business as a continued viable employment opportunity for the remaining employees.

AS A COLLEAGUE

We can be tempted to look at laid off employees as though their life is over. This is an exaggerated state of affairs. We assume the individual is worse off and was forced out against their will, when sometimes this development is for the best. The individual may have been languishing in a role but clinging to the familiar. Sometimes a severance package is the seed investment in our next opportunity. Colleagues can often torment themselves in the horror story version of a layoff, even when the impacted employee has already moved on to a better future. Support the colleague as a friend and release fighting what has already occurred.

WHEN IMPACTED

There is a natural flood of emotion when impacted by a layoff. It can be perceived as rejection or failure, triggering shame or discouragement. Taking the blame ourselves for layoffs that are the result of the business shrinking or being mismanaged isn't helpful or entirely accurate. The sooner we can shift from fighting reality to searching for how we can turn it into opportunity, the more constructive we will be. Finding your next role is your new full-time job and the more serious you work it, the sooner you will find your next work. Direct your mind to finding all the reasons why this change will be better for you in a more highly valued role that's a better fit.

MAXIMIZE THE PERFORMANCE REVIEW

MAKE THE REVIEW WORK FOR YOU FIRST

A typical strategy for performance reviews is just to make it through. We may show up to listen and then file the written review away. We think we are simply a taker of any feedback our leader chose to share and may later only remember the performance rating itself.

A more powerful strategy is using this formal milestone in the work year to advance your goals. Follow the playbook to do exactly this, whether your performance review just happened or is upcoming.

IMPORTANCE OF A PLAYBOOK

- **What do I want my leader** to think / feel / do following this performance review?
 - They think my contributions are valuable to the business when learning of them in more detail and in their entirety
 - Feel appreciation for my leadership in their team
 - So they reward and recognize my contributions to retain me
- **What do I want** to think / feel / do myself following this performance review?
 - My work is recognized and understood, giving myself the best chance to be rewarded in kind
 - I feel appreciated and valued
 - I know what development areas to focus on to expand my impact
- **My reflection on this year** and articulation of my concrete value-add that they are likely not fully aware of
 - Quantified impact of my efforts, “so what?”
 - Activities and ownership that is broader than the scope of role as defined
 - Sponsorship from other stakeholders
- **Express my goal** as my big motivator, whether it is promotion, compensation, scope of work, autonomy, or flexibility
 - Gauge their level of support
 - Arrive at estimated timing
 - Ask clearly what you can do now to expand your impact to earn your target



IMPLEMENTATION SUPPORT



EXPLORE ONE-ON-ONE COACHING SUPPORT

Well done on working to master these leadership skills! If you could use additional support in applying these tools to your unique situation, your next step is to schedule your free consultation with me at www.CheriGregov.com.

This is our agenda:

01 BRING YOUR MOST PRESSING CAREER CHALLENGES INCLUDING UNMET GOALS OR HEAVY STRESS

02 I SHOW YOU THE ROOT CAUSES BEHIND THOSE CHALLENGES AND HOW TO OVERCOME THEM

03 IF COACHING WOULD HELP YOU GET THE RESULTS YOU WANT FASTER, LEARN HOW IT WORKS

