Instrument Summaries:
Organization Development (OD) Tools

Founded in 1977, OKA is a training and consulting firm focusing on the growth and development of organizations, teams, and individuals. Blending both training and consulting principles, OKA’s interactive and experiential workshops connect new skills and tools to the real challenges facing organizations. This overview describes personality and team instruments that OKA frequently selects for our client-site workshops. In addition to unlocking the power of these tools for leaders and teams, we also qualify trainers and organization development professionals to use them within their own organizations.

<table>
<thead>
<tr>
<th>Tool/Instrument</th>
<th>Summary Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Myers-Briggs Type Indicator® (MBTI®) Assessment</td>
<td>The Myers-Briggs Type Indicator (MBTI) assessment is based on Carl Jung’s theory of psychological type, and is the most widely administered and researched personality assessment tool in use today. The MBTI assessment is based in the theory that we all have inborn preferences in the way we gather information, make decisions, energize, and orient ourselves to the outer world. Through the use of forced choice questions, the MBTI assessment identifies an individual’s personality preferences across four dichotomous scales.</td>
</tr>
<tr>
<td>Strength Deployment Inventory® (SDI®)</td>
<td>Based in Relationship Awareness theory, the Strength Deployment Inventory (SDI) focuses on describing the different values that motivate relationships and interactions with others. The SDI is unique in its ability to describe different approaches to conflict, as it reveals preferred styles both when things are going well, and in different stages of conflict.</td>
</tr>
<tr>
<td>Reversal Theory</td>
<td>Reversal Theory is a psychological concept addressing the inconsistency and changeability of individuals. Focusing on motivational styles, this theory proposes that people regularly reverse between psychological states, depending upon the meaning and motives felt by an individual in different situations at different times. These reversals are both healthy and necessary, both to ensure that one’s motives are being met, and to appropriately match personal style to the needs of a specific situation or other person.</td>
</tr>
<tr>
<td>Leadership Spectrum Profile (LSP)</td>
<td>The Leadership Spectrum Profile (LSP) is an award-winning instrument designed to assess a leader’s priorities encountered along an organization or project life cycle. The LSP outlines a results-driven framework that reflects the different demands that teams and leaders face when implementing any initiative. It also provides a practical way to influence “up the chain of command” to gain project support.</td>
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<tr>
<td>FIRO-B® (Fundamental Interpersonal Relations Orientation-Behavior™) Assessment</td>
<td>Based upon extensive research in interpersonal dynamics and needs, the FIRO-B and Element B are self-report tools in a family of instruments focusing on individual needs with respect to a team or group. The instruments effectively capture both what one wants to give interpersonally, and what one wants to receive from others. Furthermore, the instrument captures the distinction between what an individual perceives himself or herself doing, and what he actually wants to do.</td>
</tr>
<tr>
<td>Element B</td>
<td>The career crowning work of Will Schutz, the Element B is the continuation of his FIRO® theory that focuses on inclusion, control and openness and the degree to which we want, express, receive and want to receive each of these elements--all central to group life. Richer in detail and complexity than its better known predecessor, the FIRO-B assessment, Element B is a powerful coaching, team building and self-awareness tool.</td>
</tr>
<tr>
<td>Thomas-Kilmann Conflict Mode Instrument (TKI)</td>
<td>The Thomas-Kilmann Conflict Mode Instrument (TKI) is designed to identify a person’s approach to conflict. The different conflict styles are derived from two independent variables: assertiveness and cooperativeness.</td>
</tr>
<tr>
<td>Work Environment Scales (WES)</td>
<td>Assessment tool focused on providing diagnostic metrics across a broad range of workplace and team dynamics. The WES is a quantitative survey with 90 questions across ten scales in three major categories. It is designed to gather data related to these dynamics along two dimensions: the current “Real” state (perception of the “As Is”) against a future “Ideal” state (perception of the team’s “perfect” team).</td>
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</table>
Myers-Briggs Type Indicator® (MBTI®) Assessment

The Myers-Briggs Type Indicator (MBTI) assessment is based on Carl Jung's theory of Psychological Type, and is the most widely use personality assessment tool in the world. The MBTI assessment is based in the theory that we all have inborn preferences in the way we gather information, make decisions, energize, and orient ourselves to the outer world. Using 93 forced choice questions, the MBTI assessment identifies an individual's personality preferences across four scales (below). The output of the MBTI assessment is a four-letter psychological type, reflecting the respondent's reported preferences on the four scales.

<table>
<thead>
<tr>
<th>Scale</th>
<th>Scale Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>E/I –</td>
<td>Extravert (E) Gaining energy from outer world</td>
</tr>
<tr>
<td>Energy Source</td>
<td>of people, action and things.</td>
</tr>
<tr>
<td>I</td>
<td>Gaining energy from inner world</td>
</tr>
<tr>
<td>of concepts and ideas.</td>
<td></td>
</tr>
<tr>
<td>S/N –</td>
<td>Sensor (S) First perceive the immediate, practical,</td>
</tr>
<tr>
<td>Perceiving Function:</td>
<td>real facts of experience. Collect here &amp; now sensory</td>
</tr>
<tr>
<td>“Data Gathering”</td>
<td>information.</td>
</tr>
<tr>
<td>Intuitive (N)</td>
<td>First perceive possibilities, patterns and meanings of experience. Collect information through impressions.</td>
</tr>
<tr>
<td>T/F –</td>
<td>Thinker (T) Seek clarity by detaching themselves from</td>
</tr>
<tr>
<td>Judging Function:</td>
<td>problem; cause-effect oriented.</td>
</tr>
<tr>
<td>“Decision Making”</td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>Feeler (F) Seek harmony with inner values by placing</td>
</tr>
<tr>
<td>Judgment Function:</td>
<td>themselves within problem.</td>
</tr>
<tr>
<td>P</td>
<td>Perceiver (P) Prefer to live in a spontaneous flexible</td>
</tr>
<tr>
<td>Outer World Orientation</td>
<td>way.</td>
</tr>
<tr>
<td>J</td>
<td>Judge (J) SHOW external world</td>
</tr>
<tr>
<td>Orientation</td>
<td>Judging mental function (T/F)</td>
</tr>
<tr>
<td>P</td>
<td>Prefer to live in a decisive, planned way.</td>
</tr>
<tr>
<td>J</td>
<td>Prefer to live in a spontaneous flexible way.</td>
</tr>
</tbody>
</table>

The MBTI assessment is a cognitive personality tool that is particularly useful in understanding different communication, learning and leadership styles. In addition to leading hundreds of introductory sessions using this powerful tool, we also frequently apply type as a backdrop for leadership development, teambuilding, strategic planning, problem solving sessions, stress management, and communication planning. Our Partners are often invited to be keynote speakers at type-related conferences, and have authored several books and training support products related to the MBTI assessment.
Strength Deployment Inventory (SDI)

Based on Elias Porter’s Relationship Awareness Theory and rooted in the work of Erich Fromm, the Strength Deployment Inventory (SDI) describes the different values that motivate relationships and interactions with others. Relationship Awareness Theory asserts that:
(1) We behave the way we do because we want to feel good about ourselves; (2) We take different approaches to situations depending on whether we perceive things as going well or poorly. (3) Our personal weaknesses can also be seen as “overdone strengths.” (4) We naturally assume that others’ values and behavior reflect our own values, and the way we typically behave ourselves.

Using 20 multiple-choice self-report questions, the SDI calculates the relative importance of separate values systems in an individual—resulting in one of seven Motivational Values Systems:

- **Altruistic-Nurturing** - Concern for the protection, growth and welfare of others
- **Assertive-Directing** - Concern for task accomplishment and organization of resources to achieve results
- **Analytic-Autonomizing** - Concern for well-thought out approaches, order, individualism, and self-reliance
- **Flexible-Cohering** - Concern for flexibility, group welfare, and team members
- **Assertive-Nurturing** - Concern for the protection, growth and welfare of others through task accomplishment and leadership
- **Judicious-Competing** - Concern for intelligent assertiveness, justice, leadership, order and fairness in competition
- **Cautious-Supporting** - Concern for affirming and developing self-sufficiency in self and others, concern for thoughtful helpfulness with regard to justice

Alone or in combination, these styles often lead to unique behaviors, which can be both strengths, and weaknesses if overused. Unique as a conflict management tool, the SDI also captures the idea that we approach conflict along a sequence of three separate stages, characterized by different values, interests and styles. Understanding this helps anticipate others’ reactions to difficult situations, and provide strategies for altering approaches.

Other tools in the SDI Suite provide additional insights into how relationship awareness plays out in daily life and work. These tools include: the Portrait of Personal Strengths (maps one’s self-reported strengths when things are going well), the Portrait of Overdone Strengths (describes how one’s strengths could be perceived as overdone or misapplied); and the Expectations or Feedback Profiles, which provide more information about how others perceive either their role or their respective strengths (or overdone strengths) within the organization.
**Reversal Theory**

**Reversal Theory** is a psychological theory addressing our inconsistency and changeability. The theory specifically focuses on motivational styles – proposing that people regularly reverse between different psychological states, depending upon meaning and motives felt in different situations at different times. The key idea is that people do not have static motives and emotions, but routinely, and somewhat predictably, shift between different motivational states. This provides a template that people can use to understand their own and other peoples motives — and even give them actionable next steps to change or impact them.

Reversal Theory proposes that key emotions (such as anger and fear) and values (such as achievement and control) can be traced to different motivational states. We reverse between states based upon personal meaning, and whether our values are being fulfilled or not. The four domains of Reversal Theory are:

- **Means-Ends** - Focus is on the intention of an activity – and whether motivation comes from achieving goals (ends) or experiencing the process itself (means).
- **Rules** - Focus is on rules and norms – and whether we perceive rules, belonging, and conformity as supportive or restrictive.
- **Transactions** - Focus is on interactions and exchanges between people – and whether motives are based in power, ability, and control; or in care and emotional support.
- **Relationships** - Focus is upon whether one is motivated by fulfilling one’s own needs or another’s.

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**MEANS-ENDS**

- **Serious**
  - Future Goals, Achievement
  - Values ambition & future focus
  - Avoids arousal, risk and anxiety
  - Knows no humor or joy
  - Image: “Think of the Future”

- **Playful**
  - Process, Passion & Fun
  - Moment driven & present focused
  - Seeks arousal to avoid boredom
  -知s no consequence or ambition
  - Image: “Live for Today”

**RULES**

- **Conforming**
  - Belonging, Rules
  - Values tradition and duty
  - Seeks group identity
  - Knows no anger or change
  - Image: “Everybody’s Doing It”

- **Rebellious**
  - Freedom, Change
  - Rules seen as restrictive
  - Seeks innovation & change
  - Knows no embarrassment
  - Image: “Do It Your Way”

**TRANSACTIONS**

- **Mastery**
  - Power, Ability
  - Values control & strength
  - Seeks competence & pride
  - Knows no love or care
  - Image: “Feel the Power”

- **Sympathy**
  - Relationship, Care
  - Values compassion
  - Seeks personal connection
  - Solves no problems
  - Image: “The Joy of Intimacy”

**RELATIONSHIPS**

- **Self**
  - Self-Oriented
  - Values self-awareness
  - Focused on personal needs
  - Takes personal responsibility
  - Image: “You Owe It to Yourself”

- **Other**
  - Other-Oriented
  - Values giving & generosity
  - Focused on others’ needs
  - Group needs override self
  - Image: “The Pleasure of Giving”

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Leadership Spectrum Profile (LSP)

The Leadership Spectrum Profile (LSP) is an instrument designed to assess a leader's priorities encountered along an organization or project life cycle. The LSP outlines a results-driven framework that reflects the different demands that teams and leaders face when implementing any initiative. It also provides a practical way to influence "up the chain of command" to gain project support.

Use the LSP to reveal six key business priorities and a groundbreaking new framework that balances leaders’ and team results orientation, improves their effectiveness, and bolsters their ability to communicate persuasively. The six priorities along the cycle are:

- **Inventor** - Priorities focus on innovation and survival, creating new products, approaches, and methods.
- **Catalyst** - Fast growth is key, and the priority is to seize opportunity and gain support.
- **Developer** - Manage risk and establish order, developing infrastructure and effective processes and systems.
- **Performer** - Maximize results, by improving procedures, introducing measures, and focusing on resource allocation and results.
- **Protector** - Maintain success, by maintaining identity, culture, competencies, and success.
- **Challenger** - Position for the future, questioning assumptions and perspectives to ensure a strategic perspective.

The LSP is a self-contained self-report instrument, used in either an individual or team setting for both personal development, and as a project management support tool.

FIRO-B® (Fundamental Interpersonal Relations Orientation-Behavior™) Assessment & Element B

OKA offers training in two different FIRO theory instruments, the FIRO-B® Assessment (published by CPP, Inc.) and the more recent and updated Element B (published by High Performing Systems, Inc). Introduced in 1958 by Dr. Will Schutz, this theory rests with the idea that there are three dimensions of interpersonal relations playing out in most human interactions:

- **Inclusion** - The interaction and association between and among people
- **Control** - The power and influence that exists between people
- **Affection** (FIRO-B®) - The closeness felt between people
- **Openness** (Element B) - The disclosure and sharing between people
Within these three dimensions, instruments capture both what one wants to give interpersonally, and what one wants to receive from others. Further, one of the two instruments - Element B - captures the distinction between what an individual perceives himself or herself doing, and what he actually wants to do. Here are some differences between two instruments:

<table>
<thead>
<tr>
<th>FIRO-B®</th>
<th>Element B</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Expresses three dimensions of interpersonal needs as inclusion, control and affection.</td>
<td>• Expresses three dimensions of interpersonal needs: inclusion, control and openness.</td>
</tr>
<tr>
<td>• Published by CPP, Inc., FIRO-B® is a Level B instrument requiring qualification training or specific credentials to purchase.</td>
<td>• Captures the added distinction between what an individual perceives himself or herself doing, and what he or she actually wants to do.</td>
</tr>
<tr>
<td>• Published by High Performing Systems, Element B is a Level A instrument that anyone can buy.</td>
<td></td>
</tr>
</tbody>
</table>

**Thomas-Kilmann Conflict Mode Instrument (TKI)**

Thomas and Kilmann’s theory asserts that every conflict has within it two independent variables—the degree to which each participant in the conflict is **assertive** and **cooperative**:

- **Assertiveness** - Extent to which person advocates own concerns. In this variable, the focus is on “Task/Self.”

- **Cooperativeness** - Extent to which person tries to satisfy concerns of another. In this variable, the focus is on “Relationship/Other.”

The Thomas-Kilmann Conflict Mode Instrument (TKI) is specifically designed to capture a person’s preferred behavior when he or she faces a conflict. The different degrees to which each person or party is high or low assertive and cooperative yield the five different conflict “modes” shown above. The TKI is a Level A psychological instrument that can be purchased without specialized training from CPP, Inc.
Work Environment Scales (WES)

The Work Environment Scale (WES) is an assessment tool focused on providing diagnostic metrics across a broad range of workplace and team dynamics. The WES is a quantitative survey with 90 questions across ten scales in three major categories. It is designed to gather data related to these dynamics along two dimensions: the current “Real” state (perception of the “As Is”) against a future “Ideal” state (perception of the team’s “perfect” team). Data analysis and team feedback about WES results generally include:

- **Gap Analysis**: Describes the degree of difference between Real (“the way things are”) and Ideal (“ways things could be”) on each scale. Large gaps between these “As-Is” and “To-Be” levels often point to team difficulties.

- **Variance Analysis**: Assesses the range of responses within each scale (how much people agree on current or future state). For example, WES research found that Information technology (IT) professionals generally agree more on what the ideal environment *could be* than on what the real environment *is*. This was particularly marked for variables related to team involvement and dedication, emphasis on innovation, and degree of supervisor support.

- **Profile Averages**: Evaluates general response levels for each scale against norms. Are there any scales that are particularly low or high compared to the average team? Do those results align with problem areas being experienced by the team?

We have used the WES with many teams, particularly in the systems development field, and find it particularly useful for providing quantitative feedback and isolating specific areas for improvement. This can then be used to design future problem solving and team development approaches using other tools described above. Most importantly, it provides teams with new language for describing and discussing their own effectiveness, and areas needing attention.
For More Information

OKA is committed to providing peak experiences that lead to greater self-awareness and self-management on individual, group and organizational levels. Visit our website (www.typetalk.com), or give us a call (703-591-6284).

References:

Additional Instrument Fact Sheets
What is the Myers Briggs Type Indicator (MBTI)?

• A tool designed to implement the theories of C. G. Jung, a Swiss psychiatrist, who developed one of the most comprehensive theories explaining human personality.

• An instrument popularized by Katherine Briggs and Isabel Briggs Myers to make C. G. Jung’s theory of personality types practical and useful in people’s lives.

• Currently it is the most widely utilized personality preference instrument in the world.

• A tool that reflects an individual’s preferences, does not measure abilities, likelihood of success, intelligence, skills, maturity or mental health.

• An extremely useful and practical tool for achieving an understanding of the differences of others.

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An Overview of the Strength Deployment Inventory

The SDI® (Strength Deployment Inventory®) is a valid and reliable tool for managing conflict and improving relationships. It is based on the theory of Relationship Awareness®—a learning model for identifying and understanding the motivation behind behavior.

The SDI is really 2 assessments in 1. Participants answer two sets of items to calculate the relative frequency of different motivations when things are going well and when faced with conflict.

Results appear on a charting triangle as an arrow representing the participant’s unique Motivational Value System AND Conflict Sequence.

Benefits of the SDI:

- Easy to remember
- Enhances ability to communicate more effectively
- Enhances ability to handle conflict more productively
- Improves all types of relationships (home, work, school, social, or otherwise)
- Easy to integrate into training applications where productive relationships are important
- Over 35 years of applied use

<table>
<thead>
<tr>
<th>Motivational Value Systems</th>
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<tbody>
<tr>
<td><strong>Altruistic-Nurturing (BLUE)</strong>&lt;br&gt;Concern for the protection, growth and welfare of others</td>
</tr>
<tr>
<td><strong>Assertive-Directing (RED)</strong>&lt;br&gt;Concern for task accomplishment and organization of resources to achieve results</td>
</tr>
<tr>
<td><strong>Analytic-Autonomizing (GREEN)</strong>&lt;br&gt;Concern for well-thought out approaches, order, individualism, and self-reliance</td>
</tr>
<tr>
<td><strong>Flexible-Cohering (HUB)</strong>&lt;br&gt;Concern for flexibility, group welfare, and team members</td>
</tr>
<tr>
<td><strong>Assertive-Nurturing (RED-BLUE)</strong>&lt;br&gt;Concern for the protection, growth and welfare of others through task accomplishment and leadership</td>
</tr>
<tr>
<td><strong>Judicious-Competing (RED-GREEN)</strong>&lt;br&gt;Concern for intelligent assertiveness, justice, leadership, order, and fairness in competition</td>
</tr>
<tr>
<td><strong>Cautious-Supporting (BLUE-GREEN)</strong>&lt;br&gt;Concern for affirming and developing self-sufficiency in self and others, concern for thoughtful helpfulness with regard to justice</td>
</tr>
</tbody>
</table>

Stages of Conflict: People approach conflict through predictable stages of motivational changes.

<table>
<thead>
<tr>
<th>Conflict Stage</th>
<th>Focus is on:</th>
<th>BLUE</th>
<th>RED</th>
<th>GREEN</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stage 1</strong></td>
<td>Self Problem Other</td>
<td>Simply being accommodating to the needs of others.</td>
<td>Simply rising to the challenge being offered.</td>
<td>Simply being prudently cautious.</td>
</tr>
<tr>
<td><strong>Stage 2</strong></td>
<td>Self Problem Other</td>
<td>Giving in and letting the opposition have its way.</td>
<td>Having to fight off the opposition.</td>
<td>Trying to escape from the opposition.</td>
</tr>
<tr>
<td><strong>Stage 3</strong></td>
<td>Self Problem Other</td>
<td>Having been completely defeated.</td>
<td>Having to fight for one’s life.</td>
<td>Having to retreat completely.</td>
</tr>
</tbody>
</table>

SDI, Strength Deployment Inventory, and Relationship Awareness are registered trademarks of Personal Strengths Publishing.
**Reversal Theory: An Overview**

**KEY POINTS**

- General theory about what motivates self and others.
- Practical tool for understanding change and your reaction to it.
- A structure for recognizing emotions and responding in new ways.
- Based on thirty years of research and applied use.

**Reversal Theory** is a psychological theory focusing on motivation and emotion. Whereas many theories of personality focus on hard-wired preferences, Reversal Theory focuses instead on an individual’s changeability and flexibility.

Reversal Theory is organized into four “domains” or areas of focus; each has two opposing motivational states. You reverse between states as situations - and the meaning you attribute to them - change. Your emotions result from whether your motives are being fulfilled or not – if they are, good emotions result; if they are not, negative emotions emerge.

The power of Reversal Theory lies in our ability to recognize the need for a state reversal, and then to change our states (called reversals) to respond to our needs – and those of others.

**MEANS-ENDS**

- **Serious**
  - Future Goals, Achievement
  - Values ambition & future focus
  - Avoids arousal, risk & anxiety
  - **Playful**
  - Process, Passion & Fun
  - Moment driven & present focused
  - Seeks excitement to avoid boredom

**RULES**

- **Conforming**
  - Belonging, Rules
  - Values tradition & duty
  - Seeks group identity
- **Mastery**
  - Power, Ability
  - Values control & strength
  - Seeks competence & pride
- **Rebellious**
  - Freedom, Change
  - Rules seen as restrictive
  - Values innovation & change
- **Sympathy**
  - Relationship, Care
  - Values compassion
  - Seeks personal connection

**TRANSACTIONS**

- **Meets-Ends**
  - Are motives based in power and control, or in care and emotional support?
- **Relationships**
  - Are you motivated by fulfilling your own needs or another’s?

**RELATIONSHIPS**

- **Self**
  - Self-Oriented
  - Values self-reliance & own needs
  - Takes personal responsibility
- **Other**
  - Other-Oriented
  - Values giving & generosity
  - Focused on others’ needs

Want to learn more?

Designed for use by - and with - individuals, leaders, and teams, *Reversing Forward* is a 76-page full-color practical guide about Reversal Theory. It is appropriate for either self-guided learning or as a workshop support tool. Trainers and consultants: Check out the companion *Reversing Forward* slides for use with your clients! Order at [www.typetalk.com](http://www.typetalk.com).

OKA (Otto Kroeger Associates) - www.typetalk.com
Leadership/ Project Management Training Using the Leadership Spectrum Profile (LSP): A Proposed Approach

About the Instrument

The Leadership Spectrum Profile (LSP) is an award-winning instrument designed to assess a leader's priorities encountered along an organization or project life cycle. The LSP outlines a results-driven framework that reflects the different demands that teams and leaders face when implementing any initiative. It also provides a practical way to influence "up the chain of command" to gain project support.

Training Using the LSP

The design of a training session using the LSP will be driven by a number of variables, including the size of the group, whether the attendees are an intact team or are coming from diverse projects/initiatives, the general level of leadership and management experience among attendees, and the time available. A complete introduction and applications training session using the LSP requires a solid day. A compressed day (e.g., 10 AM to 4 PM) is an alternative for groups that need to attend to work activities before and after the session itself.

General agenda items for an LSP training session with managers and leaders includes:

- Introduction using participant case study overviews – What's the project/initiative, and what's its status? What's going well? Not so well? What are the desired results or outcomes? (May be one initiative or many, depending on attendees.)
- Participants complete and score the LSP instrument.
- Provide overview of the LSP life cycle model: the six key life cycle phases, their associated priorities, and their impacts on leadership.
- Relate participants' projects/initiatives to their LSP results – How can the LSP framework help explain current strengths and weaknesses? What's the natural next step in the life cycle? What questions need to be asked next? Who needs to be influenced to get there?
- Relate LSP results to participant leadership strengths and development needs – Outside the current effort, how can the LSP help attendees develop their leadership skills?
- Action planning – With any design, we close with action planning, so that participants leave with a concrete approach and steps for applying the learning of the day.

Training Outcomes

As a result of this session, leaders and managers will have a systematic framework and comprehensive set of questions for observing, analyzing, and intervening with the projects and initiatives with which they work. By understanding the shifting priorities of a project/initiative, leaders/managers can shape the future – streamlining the path to project results, reducing risks through proactive action along the way, and enhancing their own performance as leaders.