

Leading the Regions Way:



ELEVATE

TEAM PERFORMANCE



Learning Journal



LEARNING &
DEVELOPMENT

TABLE OF CONTENTS

Welcome.....	2
Rules of Engagement	3
Program Overview	5
Module 1.....	9
Hallmarks of a Leader	11
Create a Culture of Feedback.....	12
Make Connections	19
Assessments Recap	31
Importance of Self-Reflection.....	33
Handling Conflict.....	35
Team ELEVATE-r Pitch	44
Module 2 Pework Checklist	45
Module 2.....	39
High-Performance managers.....	48
High Performance Teams Coaching Practice.....	49
Capstone Presentation Practice	50
Communication Styles	51
Personal Brand/Executive Presence	57
Partnerships at regions	59
Module 3 Pework Checklist	64
The Connections Card.....	66
The Connections Card	68
Leadership Commitment Capstone	70
Capstone Presentation	72
Leadership Commitment Card	75
Personal Inventory	76
Connection Card First Connection.....	78
Day 1 Review.....	79
ELEVATE-r Pitch Review.....	80
Day 2 Review.....	81
HPT Coaching Practice.....	114
Day 3 Review.....	115
Communication Takeaways.....	116
Day 4 Review.....	117
Day 5 Review.....	118

WELCOME & OVERVIEW

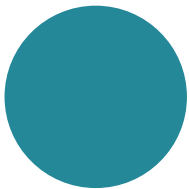
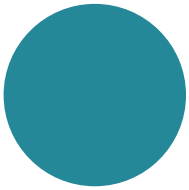
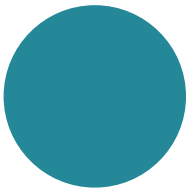
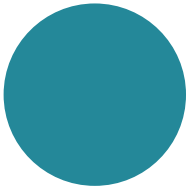
“If we aspire to be better as individuals and as a team, our performance will improve and we’ll deliver excellence to our customers, communities, and each other.”

- Regions CEO John Turner

- Take a moment to write below, from the course prework, why and how you are a leader. What do you bring to Regions as a leader? For your team?

NOTES:

RULES OF ENGAGEMENT



Rules of Engagement have tremendous impact on our ability to create meaningful relationships, connect with others successfully, close a sale, or conduct a business negotiation.

- Joe Caruso, *Caruso Leadership*

ELEVATE



"The phrase "born leader" leads people to assume you either have what it takes to be a great leader or you don't. Effective leadership skills and principles can be learned and practiced just like any others.

- Sam Bahreni, entrepreneur, growth marketer

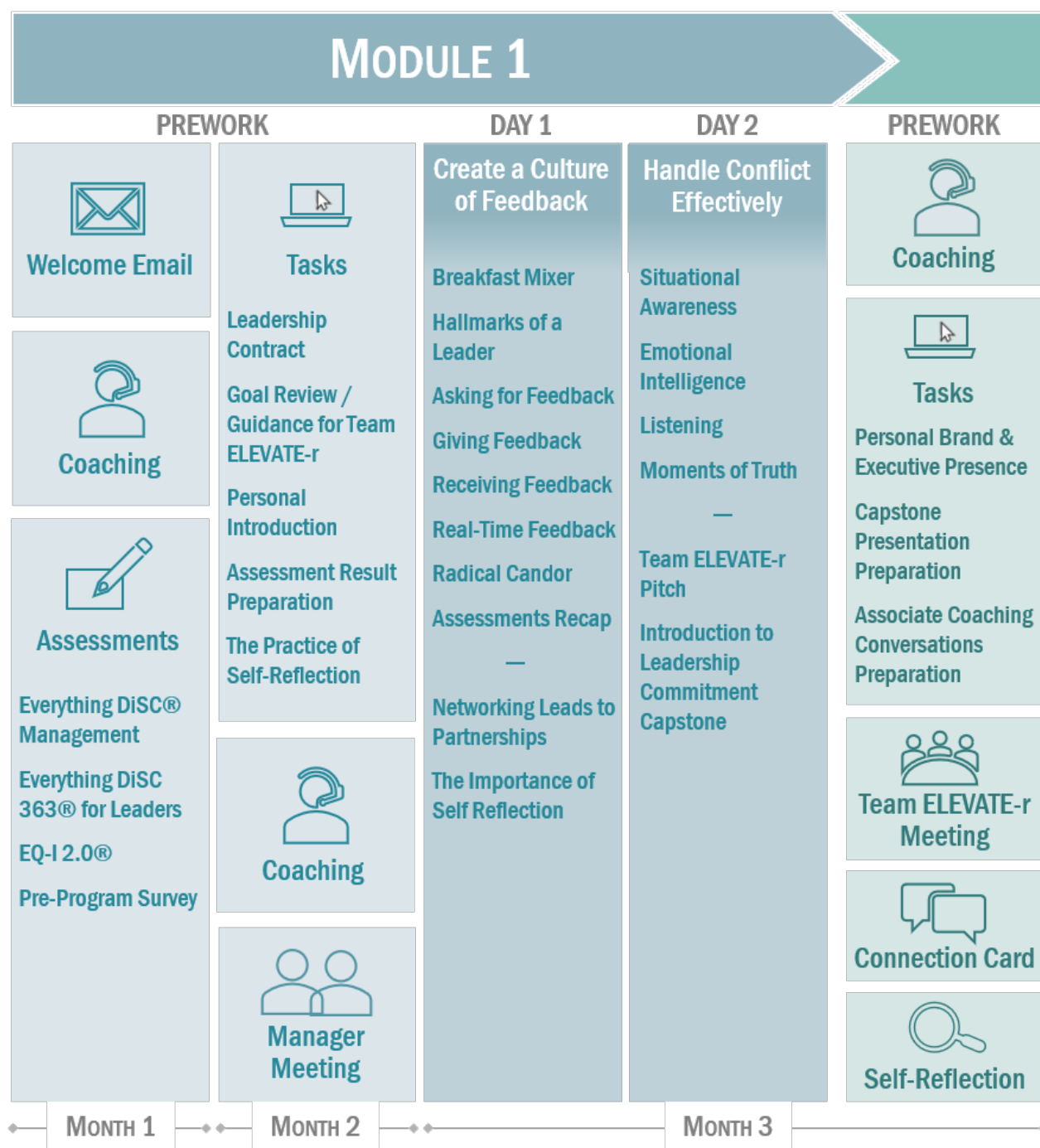
IMMERSIVE PROGRAM

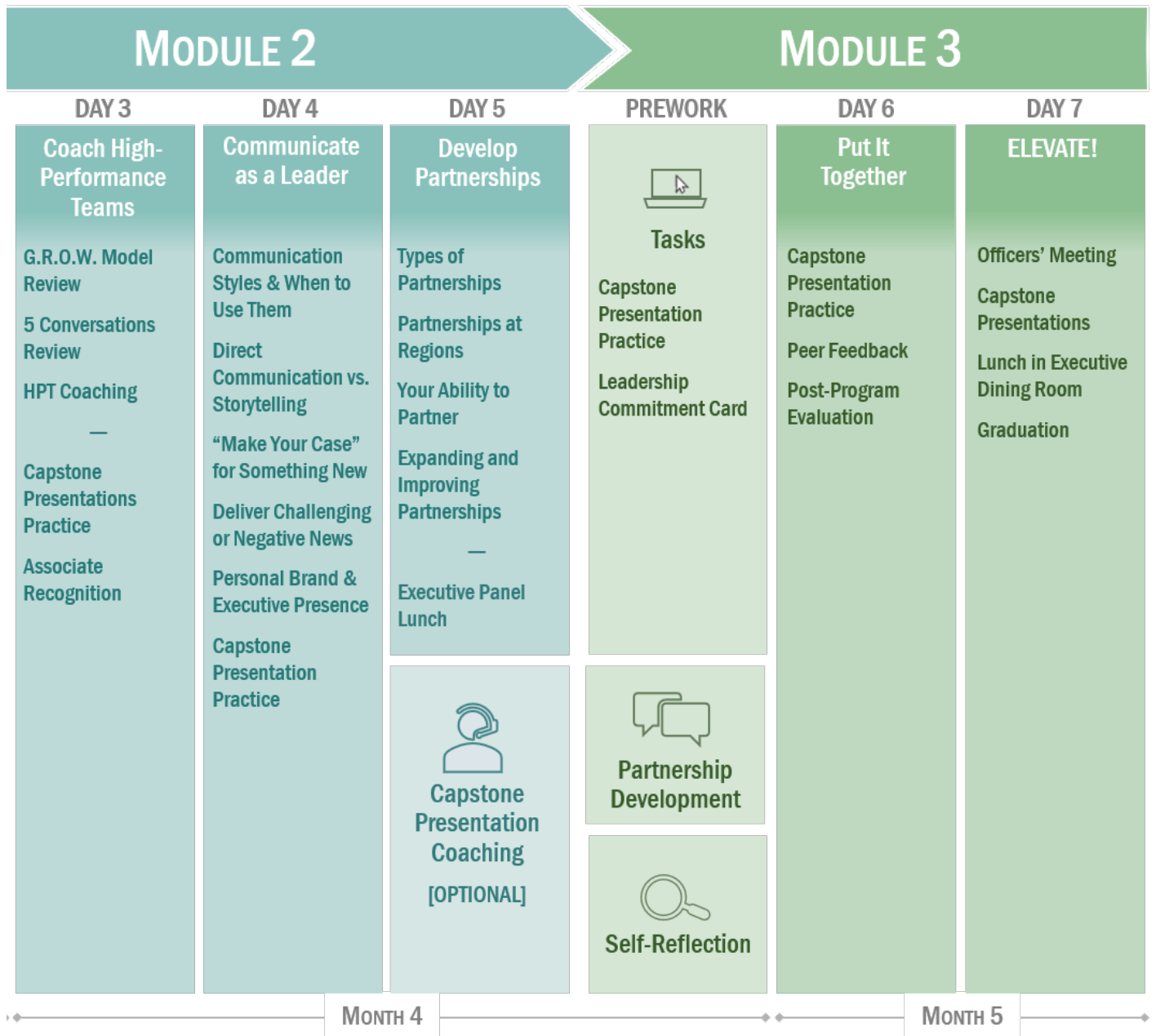
- Skills application and practice
- Challenge self and others
- Use of feedback
- HPT & Coaching
- Strengths and Emotional Intelligence
- Partnership

- What are your thoughts on “born leaders” versus leaders who learn and practice?

NOTES:

PROGRAM OVERVIEW





LEADING THE REGIONS WAY

HALLMARKS OF A LEADER



*Sue Hengel
Head of Learning
and Development*

TAKEAWAYS:



Module 1

HALLMARKS OF A LEADER

REGIONS LEADERSHIP MODEL

LEADER

- Creates a Vision
- Aligns People
- Motivates and Inspires

MANAGER

- Plans and Budgets
- Organizes and Staffs
- Controls and Problem Solves

COACH

- Builds Relationships
- Gives Feedback
- Applies an Effective Coaching Process



Engagement-Focused

- Builds trust through words and actions
- Inspires and energizes
- Empowers team members

Collaborative & Inclusive

- Regions 360 approach
- Respects and values individual differences and unique contributions
- Encourages associates to be their authentic selves

Strengths-Based

- Gives people the opportunity to do what they do best
- Invests in your own strengths
- Maximizes the team's and individuals' potential and successes through talent awareness and development

Development-Minded

- Gives honest, thoughtful, and specific feedback
- Assesses and acts on associate potential
- Grows the team's capabilities through purposeful talent development

Performance-Oriented

- Sets clear expectations and goals that align with our strategic priorities
- Holds team and self accountable
- Helps associates identify and overcome barriers to performance

Results-Driven

- Continuous innovation and improvement
- Manages controllables to achieve goals
- Recognizes and celebrates successes

NOTES:

LEADERSHIP AND FEEDBACK



“In a study of 50,000 executives, leaders who ask most frequently for feedback were rated, on average, at the 86th percentile in overall leadership effectiveness.”

- Forbes, 2018

CONSTRUCTIVE FEEDBACK



Feedback conversations can cause heart rates to
RISE

_____%

NOTES:

WITH **CONSTRUCTIVE FEEDBACK**, MY FIRST INSTINCT IS TO ...

ONGOING FEEDBACK & CHECK-INS = SUCCESSFUL OUTCOMES

"Clear and regular feedback is critical to associate recognition and engagement."

- Gallup

"89% of HR leaders agree ongoing feedback and check-ins are key for successful outcomes."

- Workhuman.com

Share a time you offered clear feedback that led to better associate or team engagement.

ASKING FOR FEEDBACK

“Feedback starts with the leader... By asking, you lead the conversation and ensure a positive tone.”

“When associates feel heard, it makes them feel more included and gives them a greater sense of autonomy.”

- *Using Neuroscience to Make Feedback Work and Feel Better, Organizations & People, 2018*

THE POWER OF FEEDBACK



LARRY KAYE
FORMER SENIOR VICE PRESIDENT
FIDELITY INVESTMENTS

NOTES:

FEEDBACK

BEST PRACTICES



How can you remember to stop your first reaction when *receiving* feedback?

How important is being specific and explicit when *giving* feedback?

NOTES:

RECEIVING FEEDBACK

1. Stop Your First Reaction
2. Listen for Understanding
3. Say “Thank You”
4. Ask Questions to Deconstruct the Feedback
5. Request Time to Follow Up

GIVING FEEDBACK

1. Offer Honest Feedback
2. Be Specific and Explicit
3. Explain the Intent
4. Focus on the Improvement (Not Past Mistakes)
5. Encourage the Person to Voice the Steps to Change

RECEIVING FEEDBACK WORKSHEET

Reflect on a time it was a challenge to **receive** (and accept) constructive feedback from a peer, manager, or associate. It can include an early-career moment, a recent experience, or any work-related feedback. Create a 1-minute story to share with a small group.

What happened?

Who was involved?

What were you thinking?

How did you react?

What was the outcome? What did you learn?

GIVING PEER FEEDBACK

Use this worksheet to record feedback to offer colleagues on their 1-minute stories.

Did your peer stay open to input from the person giving the feedback? Does he or she seem to value staying open to input now?

Did the peer maintain composure? Did he or she approach the feedback in a constructive way?

Did your peer seem to allow emotions to sway him or her? Was he or she able to be fair-minded under pressure, at least externally?

Did your peer show accountability? If so, how did he or she do this?

Was your peer able to accept the feedback? Was there a lesson learned? If so, what was it? How has he or she been handling feedback differently after this incident?

FEEDBACK STORIES



NOTES

SMALL GROUP PRESENTATIONS

Form small groups of 3-4

Each person presents a 1-minute story to the small group

Practice giving and receiving feedback using worksheets in the Learning Journal

*“89% of HR leaders agree ongoing peer feedback is key for successful outcomes.”
– Forbes, 2019*

NOTES:

MAKE CONNECTIONS



Who did you connect with and why?
Who made an impression?
Why are such connections important for your future leadership roles?

NETWORKING LEADS TO PARTNERSHIPS



NETWORKING



RESOURCING



PARTNERSHIP

NOTES:



PARTNERSHIPS

MAKE YOUR FIRST CONNECTION

1. Pair Up.
2. Use Connections Card.
3. Record notes in your Learning Journal.

Use the Connections Card to meet *everyone* in the cohort by Day 5 of the program. Use lunch and after class to connect. Meet for coffee, Skype, or connect after work.

THE CONNECTIONS CARD

Team Connections

1. What is the purpose of the team you lead?
2. How does that purpose fit into the overall strategy at Regions?
3. Who do you define as your customers?
4. How do you define your highest priority customers?
5. What does success look like in serving your customers?
6. What are your team's common barriers to that success?

Partnering Connections

1. What is your definition of a strong partnership?
2. Who are your current partners?
3. Who are the partners that bring out the best in you? Why?
4. Describe the most productive partnership you have had. What made it so productive?
5. How would you describe an ideal partnership going forward?
6. In what ways could I be a beneficial partner for you and your team?

Work-Style Connections

1. Tell me about your best day at work and why it was your best day.
2. What types of projects inspire and engage you most?
3. Tell me about how your DISC style influences the way you work.
4. How do you balance your role as a leader, manager, and coach? Which is most fulfilling?
5. What's been your best or biggest accomplishment this year?
6. What are your largest challenges right now?

Personal Connections

1. What do you enjoy doing most when you are off work?
2. Describe the best ways you unwind and destress away from the office.
3. How are you involved in the community? Is there a favorite cause you support?
4. Tell me about your most recent or most memorable trip or vacation.
5. What's the best book/article/documentary you've read/watched recently? Why?
6. What are the top two things on your bucket list?



V19.3



NOTES:

PERSONAL INVENTORY



BENEFITS OF SELF-REFLECTION

- Solidifies Integrity – By becoming clear on core values and personal strengths, we better adapt to pressure and changing circumstances.
- Boosts Emotional Intelligence – Considering the outcomes of key decisions allows us to make better choices in the future.
- Increases Confidence – Thoughtful reflection on our own behavior gives us the ability to evaluate and re-direct emotions, especially during times of stress.

TURN TO THE PERSONAL INVENTORY TAB

Reflect on the following questions:

1. What was most memorable about your connections conversation?
2. Was there an assumption that you made about that person that resulted in some sort of surprise?
3. Is there a way you can make yourself more open and approachable?

TASKMASTER GAME



SMALL GROUP COMPETITION

Background - Taskmaster is a British comedy panel game show originally created by comedian Alex Horne during the Edinburgh Festival. It premiered on television on Dave (UK Channel) in 2015.

The TV series stars comedian and actor Greg Davies now in the title role of the Taskmaster, issuing simple comedic and bizarre tasks to five regular contestants – usually comedians – with Alex Horne acting as Davies's assistant and umpire during the challenges.

RULES

1. The facilitator serves as the Taskmaster. The Taskmaster will explain the task.
2. Participants form teams of 3-4.
3. Each team has 2 minutes to complete the task. All teams participate in the activity at the same time.
4. No consulting with anyone outside your team. No phone/device or internet.
5. After 2 minutes, the Taskmaster will review each team's task and determine a winner.
6. The Taskmaster's judgement is final.
7. Have fun!

REAL-TIME FEEDBACK



Real-Time Feedback

SHARON GRADY

PRESIDENT
GRADY COMPANY

What made receiving feedback more comfortable for Sharon?

1.

2.

3.

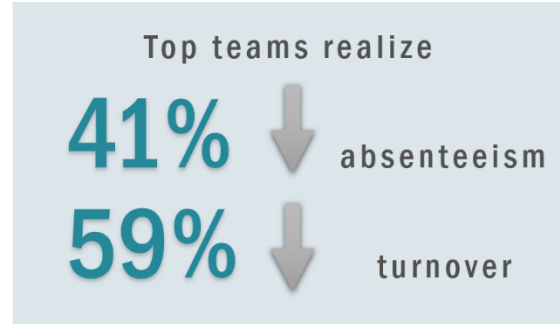
NOTES:

FEEDBACK MATTERS

Clear Expectations = Engaged Associates



Used with the permission of Gallup, Inc.
Copyright © 2016 Gallup, Inc. All rights reserved.



What would an extra 21% mean to your bottom line?

As a leader, how much time could it save with less absenteeism and turnover?

What leader attributes drive *strong* associate engagement (and less turnover)?

NOTES:

RADICAL CANDOR

Build Strong Relationships

What is the formula for building solid business relationships?

+

=

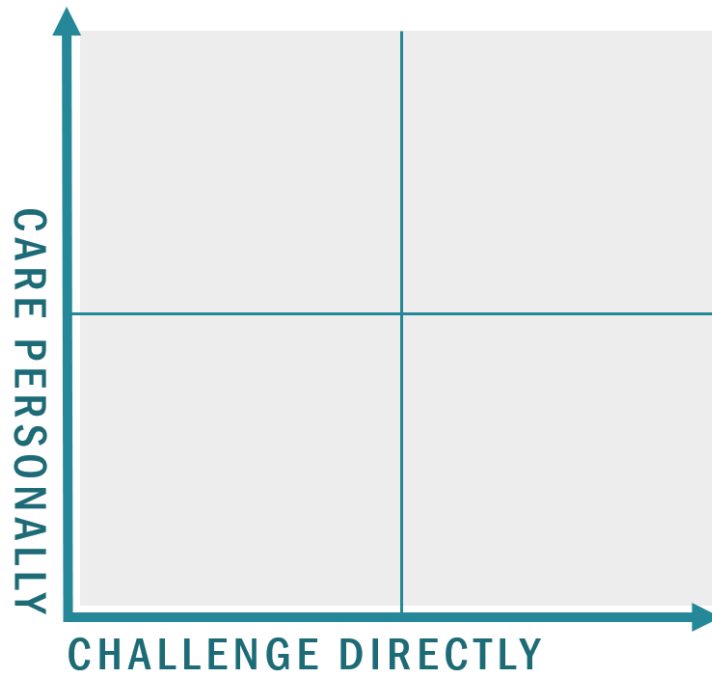
Radical Candor

If associates feel you don't care about them personally, how openly will they communicate with you? How much will they trust you?

NOTES:

RADICAL CANDOR FRAMEWORK

Get, Give, & Encourage Connection



What happens when we handle situations in each part of the framework?

Use the framework to identify your situation, then guide your conversations to a more productive place.

PRACTICE RADICAL CANDOR

4 STEPS

Be Candid - Just say it! - Criticism that is kind and clear is far more helpful than not saying it at all.

Connect - Managers who understand associate's motivations bring intentionality, structure, and accountability to teams.

Motivate - When praising, give specific information that includes a clear articulation of what was achieved and why that achievement matters

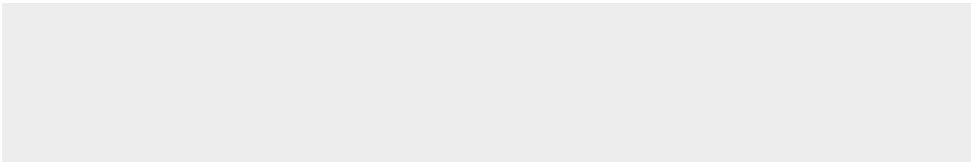
Collaborate - It's difficult for a team to succeed if they don't know the expectations. Work to get buy in up front and make sure everyone knows the end goal.

NOTES:

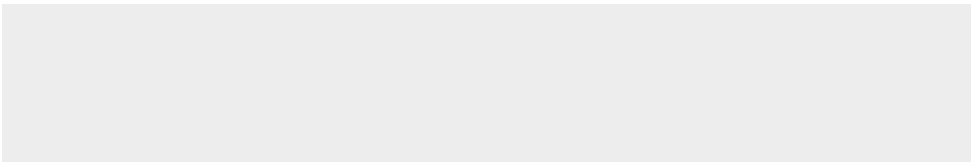
TEAM STRUCTURE

Each team has a unique structure. Who gets the most attention?

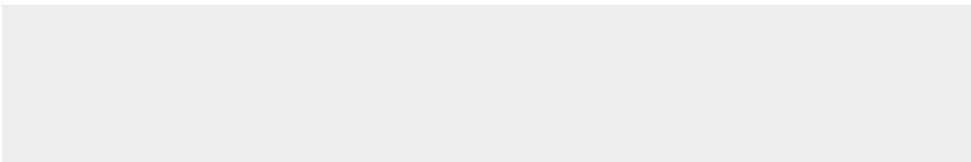
Superstars



Rock Stars



Co-Stars



MOTIVATE YOUR TEAM



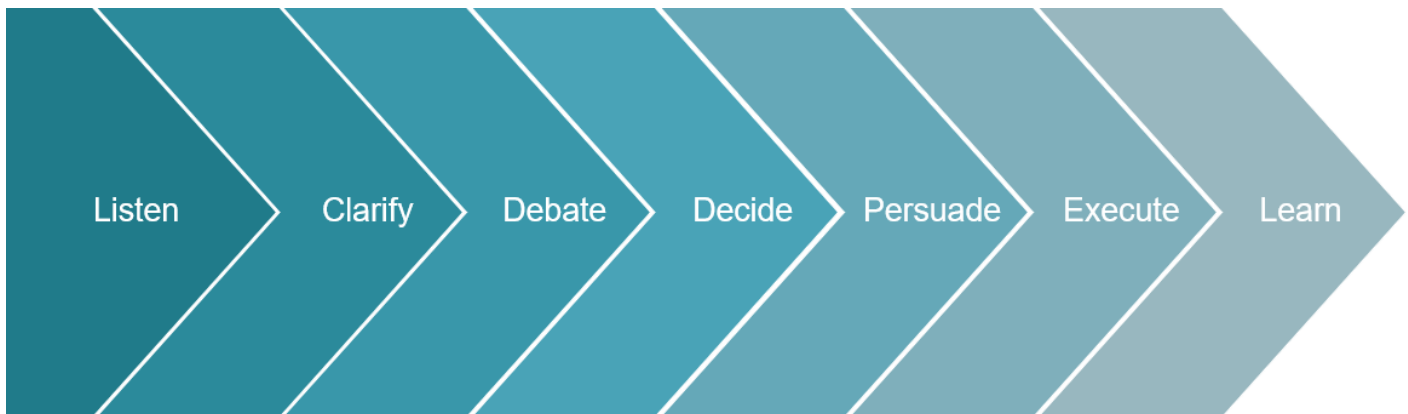
Associates who feel their voices are heard are 4.6 times more likely to feel empowered to perform their best work.

- *Salesforce*

NOTES:

USE RADICAL CANDOR TO DRIVE RESULTS COLLABORATIVELY

“The Surprising Secret to Being a Good Boss” Story



How best can you **learn** from these steps to keep improving?

How can you use these steps to gain support on a new initiative?

How can you use real-time feedback for clarifying and debating successfully?

RADICAL CANDOR

PRACTICE WITH A COLLEAGUE



INSTRUCTIONS:

Pair up. Pick a topic listed or choose one of your own.

Practice radical candor with your colleague as you improvise a conversation about the topic.

Use the process as a possible list of questions to gauge how you're doing. For example:

Are you listening?

Are you clarifying?

When you clarify, is your colleague understanding you?

ASSESSMENTS RECAP

- EQ-I 2.0 measures self-awareness, expression, interpersonal skills, decision making, and stress management.
- DiSC is powered by 40 years of research (adaptive testing and sophisticated algorithms) to deliver precise insights to each participant.
- DiSC 363 provides insight on your leadership outlook. More than 26,000 participants were included in the research to develop it.

ASSESSMENT RESULTS

RECORD YOUR THOUGHTS

Think about the results of the three assessments you completed for the program. In your own words, record the items you strongly agree with, disagree with, and anything you question in the results.

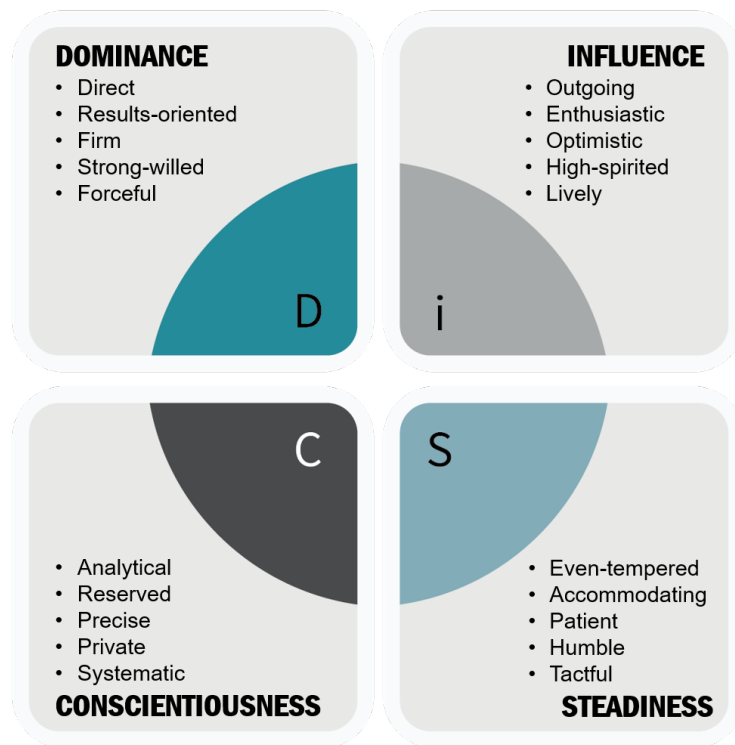
EVERYTHING DISC MANAGEMENT

Record the items you strongly agree with, including page numbers for reference:

Record the items you disagree with, including page numbers for reference:

NOTES:

DISC ACTIVITY



PROFILE GROUP DISCUSSIONS

What was your impression of your results?

What were your major a-ha moments?

What are you planning to work on so we can help reinforce that?

What are you most proud of?

What is one thing that surprised you?

IMPORTANCE OF SELF-REFLECTION



*Leading the Regions Way:
The Importance of Self-Reflection*

REGIONS LEADERS

NOTES:

PERSONAL INVENTORY

MODULE 2 PREWORK CHECKLIST

MEETINGS

- _____ Meeting with mentor
- _____ ELEVATE-r Team meeting
- _____ Meeting with manager



PERSONAL BRAND AND EXECUTIVE PRESENCE

- _____ Read *Executive Presence: What Is It, Why You Need It and How to Get It* within first week after Module 1
- _____ Watch video: *Ted's Secret to Great Public Speaking*
- _____ Watch video: *Conduct an Informal 360*
- _____ Complete the steps in the Accountability and Personal Leadership Style document

LEADERSHIP COMMITMENT CAPSTONE PREPARATION

- _____ Review the *Leadership Commitment Capstone Guidelines*
- _____ Complete preparation activities
- _____ Prepare to present outline in class during Module 2

ASSOCIATE COACHING CONVERSATIONS PREPARATION

- _____ Watch video: *Coaching at Regions*
- _____ Complete the *Associate Coaching Notes* worksheet
- _____ Reference *Notes on Preparing to Coach an Associate*

ONGOING TASKS

- _____ Complete optional developmental courses listed on the Jam site
- _____ Connect with more colleagues on your **Partnership "Connections Card"**
- _____ Self-reflect in the **Personal Inventory** section of the Learning Journal 15 minutes per day

Note: One entry should be dedicated to your effectiveness with using a network to accomplish a common goal.

Module 2 Prep: Team Meeting



Conduct a Team Meeting to ensure your associates are connected to the company's mission and goals.

NOTES:

MEETING AGENDA

1. Initiate team conversation
2. Engage team based on answers
3. Share the Team ELEVATE-r Pitch
4. "How would we act differently if we were aligned with mission / goals?"



HANDLING CONFLICT



Understanding the Value of Conflict Competence

CRAIG RUNDE

AUTHOR AND DIRECTOR OF THE CENTER FOR CONFLICT DYNAMICS
AND MEDIATION TRAINING INSTITUTE

NOTES:

Ways to Quash Conflict

1.

2.

3.

4.

5.

Situational Awareness

Context: What is _____ .

Circumstance: What has _____ .

Consequence: What could _____ .

Emotional Intelligence

*“People with an average IQ **AND** high Emotional Intelligence (EI) outperform those with the highest IQs 70% of the time.”*

Forbes

		WHAT I SEE	WHAT I DO
PERSONAL COMPETENCE		Self-Awareness	Self-Management
	SOCIAL COMPETENCE	Social Awareness	Relationship Management

Listening Skills



NOTES:

Moments of Truth

Improv Steps

When someone says:	You might be thinking:	Avoid Saying:	Instead, think out loud by saying:
"What experience do you have in the banking industry?"	"Uh oh"	"Only a few years in the banking industry, but I do have ..."	"I have two years in the banking industry. Is that a concern?"
"I hear you haven't contributed to the project recently."	"How can they say that?"	"I've been really busy with other projects..."	"Can you share exactly what was said? I want to make sure I understand."
"I'm very disappointed in your product."	"What? How can that be?"	"We feel it's a quality product and stand behind it."	"That's not at all what I was expecting to hear. Can you tell me more?"

"Yes, and..."

Words that imply **YES** mean...

you accept what is happening in the moment and acknowledge what your partner has said.

Words that imply **AND** mean...

you build on that acknowledgement and advance the relationship or action.

NOTES:



TEAM ELEVATE-r PITCH



NOTES:

MODULE 2 PREWORK CHECKLIST

MEETINGS

- _____ Meeting with mentor
- _____ ELEVATE-r Team meeting
- _____ Meeting with manager



PERSONAL BRAND AND EXECUTIVE PRESENCE

- _____ Read *Executive Presence: What Is It, Why You Need It and How to Get It* within first week after Module 1
- _____ Watch video: *Ted's Secret to Great Public Speaking*
- _____ Watch video: *Conduct an Informal 360*
- _____ Complete the steps in the Accountability and Personal Leadership Style document

LEADERSHIP COMMITMENT CAPSTONE PREPARATION

- _____ Review the *Leadership Commitment Capstone Guidelines*
- _____ Complete preparation activities
- _____ Prepare to present outline in class during Module 2

ASSOCIATE COACHING CONVERSATIONS PREPARATION

- _____ Watch video: *Coaching at Regions*
- _____ Complete the *Associate Coaching Notes* worksheet
- _____ Reference *Notes on Preparing to Coach an Associate*

ONGOING TASKS

- _____ Complete optional developmental courses listed on the Jam site
- _____ Connect with more colleagues on your **Partnership “Connections Card”**
- _____ Self-reflect in the **Personal Inventory** section of the Learning Journal 15 minutes per day

Note: One entry should be dedicated to your effectiveness with using a network to accomplish a common goal.

Module 2 Prep: Team Meeting

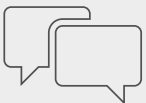


Conduct a Team Meeting to ensure your associates are connected to the company's mission and goals.

NOTES:

MEETING AGENDA

5. Initiate team conversation
6. Engage team based on answers
7. Share the Team ELEVATE-r Pitch
8. "How would we act differently if we were aligned with mission / goals?"



Meet with your manager following this meeting to:

- Share the Team ELEVATE-r Pitch and discuss takeaways from the team meeting.
- Discuss steps to take to align the team better.

HIGH-PERFORMANCE MANAGERS

Can you remember the three characteristics of high-performance managers?

1.

2.

3.



NOTES:

HIGH PERFORMANCE TEAMS

COACHING PRACTICE



Use the space below to capture observations, tips, and key takeaways of the HPT Coaching practice.

NOTES:

CAPSTONE PRESENTATION PRACTICE



Use the space below to capture observations, tips, and key takeaways of the presentation practice.

NOTES:

COMMUNICATION STYLES

Elevator Pitch

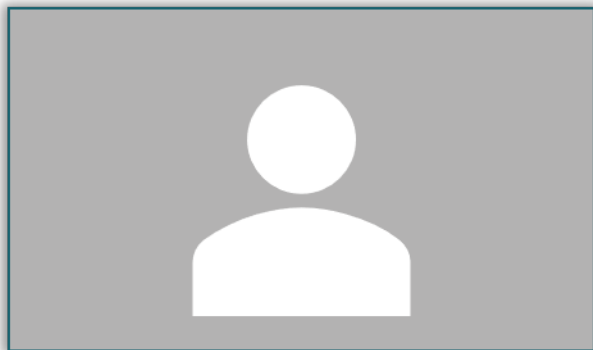
... a succinct and persuasive sales pitch.

Direct



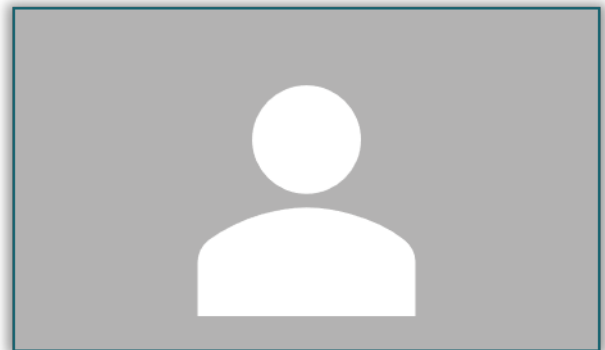
Think 1-2-3

1. State _____ .
2. Say _____ .
3. Explain _____ .



More Value, Driven by Insights

SCOTT PETERS, HEAD OF CONSUMER SERVICES



Managing for the Long-Term

JOHN TURNER, PRESIDENT & CEO

NOTES:

Storytelling



Storytelling to Inspire

BARRY ADAMS, RETIRED REGIONS LEADER

According to Mr. Adams, what are the elements of storytelling?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

Storytelling Tips

Story Selection

- What's your objective? What do you want the audience to think, feel, or do after the story?
- Think of a relevant success, failure, or moment of clarity around that objective
- Can't find a real story? Use a folktale, or make one up (but let audience know you've made it up)

Find Great Stories

- Create a story "wish list"
- Capture stories that happen around you
- Recall stories you hear others tell
- Search your past
- Interview colleagues: share your wish list and ask open-ended questions about specific moments
- Create venues for sharing stories

STORYTELLING STRUCTURE

Step	Answer these questions:	Sounds like ...
Hook	Why should I listen to this story?	"I think the best example I've seen of that was ..."
<i>Transition In</i>		
Context	Where and when did it take place? Who is the hero and what do they want? What other background is needed to understand character motivations?	"Back in/at, there was _____, and they were trying to ..."
Challenge	What was the problem/opportunity?	"Then, one day ..."
Conflict	What did they do about it? Show the honest struggle between hero and villain, even if internal. Not too easy.	"So they _____, and then they _____, and so they _____."
Resolution	How did it turn out (for everyone)? How are things/characters changed as a result?	"Eventually ..."
<i>Transition Out</i>		
Lesson	What did you learn?	"That's when I realized ..."
Action	What do you think I should do?	"And that's why I think you should ..."

STORY ELEMENTS

Basics: Relatable hero, relevant challenge, honest struggle, worthy lesson.

Emotion: Identify relevant emotions. Use "tell me," "show me," "make me feel," and dialog techniques to develop the most important emotions. Avoid unwelcome emotional manipulation.

Surprise: At beginning to get attention; at end to seal it in memory. Lead with an unusual event, use flashback, skip one element in the context, or hide a critical fact until the end.

Dialog: Replace scenes where you *describe* what characters meant with what they actually said (outer) or thought (inner).

Details: Replace generalities with specifics. Show don't tell. Pick one important scene and describe it in vivid detail. Use metaphors.

Length: 3-5 minutes to tell (450-750 words)

Accuracy: Set expectations about accuracy of story. Would someone who was there be offended at your version?

Delivery:

Oral: Focus on the story, not physical performance. 5 or 6 filler words a minute is okay. Conversational tone.

Written: Write the way you'd like to speak – 15 words per sentence, small words, active voice, Flesch-Kincaid of 7-8.

Practice and Save: Stories should be unscripted and extemporaneous, not memorized. Practice while walking, as if sharing with a friend during a conversation. Save your story in outline form.

Situational Awareness



Can you think of a time you selected poorly? How did you know?

NOTES:

Make a Case



NOTES:

SUCCESS FACTORS

- Situational awareness
- Ability to articulate vision
- Use of innovation, continuous improvement, optimism
- Appropriate communication type used
- Be persuasive!

Delivering Difficult News



SUCCESS FACTORS

- Know your audience
- Don’t overpromise
- Consider EI principles, concise communication, authenticity, accountability, trust, and courage
- Take out the “They”

My challenge: _____

NOTES:

PERSONAL BRAND/EXECUTIVE PRESENCE

Communication Myths

MYTH #1:
WE NEED MORE COMMUNICATION

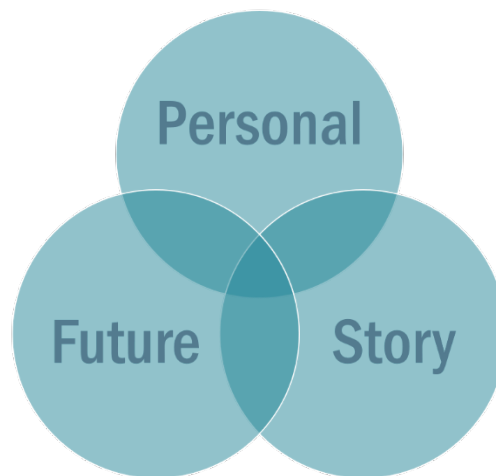
— We don't need more communication, we need more _____ and _____.

MYTH #2:
COMMUNICATION IS AN IMPORTANT
LEADERSHIP COMPETENCY

— Communication *is* your _____.

Engage and Inspire

3 Dimensions of Leadership Communication





*What Does Leadership
Communication Mean to You?*

REGIONS EXECUTIVES

NOTES:

PARTNERSHIPS

Types

To succeed as a leader, build three types of networks:

- **Operational**—people you need to accomplish your assigned, routine tasks.
- **Personal**—kindred spirits outside your organization who can help you with personal advancement.
- **Strategic**—people outside your control who will enable you to reach key organizational objectives.

	Operational	Personal	Strategic
Purpose	Get work done efficiently	Develop professional skills through coaching and mentoring Exchange important referrals and needed outside information	Figure out future priorities and challenges Get stakeholder support for them
How to Find Partners	Identify individuals who can block or support a project	Participate in professional associations, alumni groups, clubs, and personal-interest communities	Identify lateral and vertical relationships with other functional and business unit managers—people outside your immediate control—who can help you determine how your role and contribution fit into the overall picture

NOTES:

Regions Partnerships at Work



S&G Cycle Time

NOTES:

Elevating Partnerships

LEROY ABRAHAMS
EVP FOR COMMUNITY AFFAIRS



NOTES:

Partnership Traits & Barriers



NOTES:

TRAITS

1. Maintain a mind-set of collaboration, not competition
2. Work from a position of equal status
3. Lead and follow
4. Balance assertiveness and cooperation in the face of conflict
5. Deal with disagreements and missteps productively and gracefully
6. Demonstrate a commitment to sharing responsibility for achieving a goal
7. Take responsibility for your part in the partnership's successes and failures

BARRIERS

1. A narrow view of relationships....
2. A win/lose mindset....
3. Undermanaged self-orientation...
4. Lack of confidence...
5. An overdeveloped ability to criticize...
6. A tendency to either lead or follow...
7. A need for immediate gratification....
8. Intolerance of ambiguity...
9. Discomfort with conflict...
10. A limited view of problems and opportunities...

Expanding Partnerships

What are my biggest personal challenges that impact my partnerships?

1.

2.

3.



How can I tactically improve in these areas?

What partnership do I want to expand or improve? How?

MODULE 3 PREWORK CHECKLIST

LEADERSHIP COMMITMENT CAPSTONE PREPARATION

- _____ Review the presentation rubric
- _____ Finalize presentation based on latest content and presentation practice.
- _____ Review presentation tips
- _____ Practice presenting to your manager and solicit feedback.
- _____ Submit any digital materials (e.g., supporting visuals) per guidelines.
- _____ Be ready to present during Module 3.
- _____ Complete your Leadership Commitment Card.



PARTNERSHIP DEVELOPMENT

- _____ Follow-through and continue developing the partnership you wanted to expand or a partnership that you wanted to improve (per Day 5).

SELF-REFLECTION

- _____ Self-reflect in the **Personal Inventory** section of the Learning Journal 15 minutes per day.
- _____ Dedicate some entries to assessing how you've made progress in the following areas:
 - _____ Fact-based decision-making
 - _____ Empathy
 - _____ Tact and calm in stressful situations
 - _____ Concise communication
 - _____ Ability to accept feedback



Module 3

The Connections Card

THE CONNECTIONS CARD

Team Connections

1. What is the mission of the team you lead?
2. How does that mission fit into the overall strategy at Regions?
3. Who do you define as your internal and external customers?
4. How do you define your highest priority customers?
5. What does success look like in serving your customers?
6. What are your team's common barriers to that success?

Partnering Connections

1. What is your definition of a strong partnership?
2. Who are your current partners?
3. Who are the partners that bring out the best in you? Why?
4. Describe the most productive partnership you have had. What made it so productive?
5. How would you describe an ideal partnership going forward?
6. In what ways could I be a beneficial partner for you and your team?

Work-Style Connections





1. Tell me about your best day at work and why it was your best day.
2. What types of projects inspire and engage you most?
3. Tell me about how your DiSC style influences the way you work.
4. How do you balance your role as a leader, manager, and coach? Which is most fulfilling?
5. What's been your best or biggest accomplishment this year?
6. What are your largest challenges right now?

Personal Connections

1. What do you enjoy doing most when you are off work?
2. Describe the best ways you unwind and de-stress away from the office.
3. How are you involved in the community? Is there a favorite cause you support?
4. Tell me about your most recent or most memorable trip or vacation.
5. What's the best book/article/documentary you've read/watched recently? Why?
6. What are the top two things on your bucket list?

List of Connections Completed

1.		_____
		_____
		_____
3.		_____
		_____
		_____
5.		_____
		_____
		_____
7.		_____
		_____
		_____
9.		_____
		_____
		_____
11.		_____
		_____
		_____
13.		_____
		_____
		_____
15.		_____
		_____
		_____

2.		_____
		_____
		_____
4.		_____
		_____
		_____
6.		_____
		_____
		_____
8.		_____
		_____
		_____
10.		_____
		_____
		_____
12.		_____
		_____
		_____
14.		_____
		_____
		_____
16.		_____
		_____
		_____



Leadership Commitment Capstone

CAPSTONE PRESENTATION

Presentation Guide

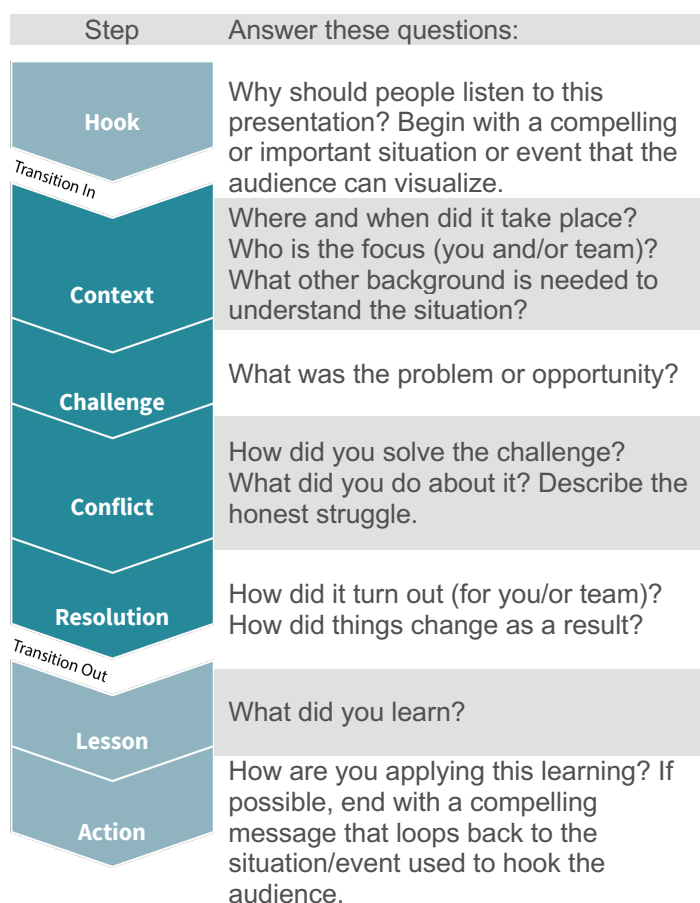
Topic Ideas

- "How I Will Elevate My Team's Performance?"
- "How I Will Lead Change throughout My Organization?"
- A similar topic that motivates and inspires

Preparation

- What's your objective?
- Think of a relevant success or moment of clarity around that objective.
- What do you want the audience to think, feel, or do after your presentation?

Possible Presentation Structure



Basic Elements

Basics: Relatable situation, relevant challenge, honest struggle, worthy lesson

Length: 3-5 minutes to tell (approximately 500-800 words)

Hook: Use an important message, situation, or symbol at the beginning to get attention; use that same message, situation, or symbol at end to seal it in the audience's memory.

Surprise: Choose to share an unusual event or save a critical fact until the end

Emotion: Identify relevant reactions and appropriate emotions (surprise, happiness, concern, humor, etc.)

Details: Replace generalities with specifics. Choose one important scene and describe it in vivid detail.

Delivery: Use a conversational, enthusiastic, but professional tone, as if you were speaking to a friend about an important topic. Write the way you'd like to speak – approximately 15 words per sentence using an active voice.

Practice: Practice, practice, practice. Experienced speakers practice many times until the message flows naturally. Use feedback to enhance and improve your delivery and message.

10 Presentation Preparation Tips

1

Nervousness Is Normal. Practice and Prepare!

Before you begin to craft your message, consider who the message is intended for. Learn as much about your listeners as you can. This will help you determine your choice of words, level of information, organization pattern, and motivational statement.

2

Know Your Audience. Your Speech Is About Them, Not You.

Before you begin to craft your message, consider who the message is intended for. Learn as much about your listeners as you can. This will help you determine your choice of words, level of information, organization pattern, and motivational statement.

3

Organize Your Material in the Most Effective Manner to Attain Your Purpose.

Create the framework for your speech. Write down the topic, general purpose, specific purpose, central idea, and main points. Make sure to grab the audience's attention in the first 30 seconds.

4

Watch for Feedback and Adapt to It.

Keep the focus on the audience. Gauge their reactions, adjust your message, and stay flexible. Delivering a canned speech will guarantee that you lose the attention of or confuse even the most devoted listeners.

5

Let Your Personality Come Through.

Be yourself, don't become a talking head—in any type of communication. You will establish better credibility if your personality shines through, and your audience will trust what you have to say if they can see you as a real person.

6

Use Humor, Tell Stories, and Use Effective Language.

Inject a funny anecdote in your presentation, and you will certainly grab your audience's attention. Audiences generally like a personal touch in a speech. A story can provide that.

7

Don't Read. Work from an Outline.

Reading from a script or slide fractures the interpersonal connection. By maintaining eye contact with the audience, you keep the focus on yourself and your message. A brief outline can serve to jog your memory and keep you on task.

8

Use Your Voice and Hands Effectively. Omit Nervous Gestures.

Nonverbal communication carries most of the message. Good delivery does not call attention to itself, but instead conveys the speaker's ideas clearly and without distraction.

9

Grab Attention at the Beginning, and Close with a Dynamic End.

Do you enjoy hearing a speech start with "Today I'm going to talk to you about X"? Most people don't. Instead, use a startling statistic, an interesting anecdote, or concise quotation. Conclude your speech with a summary and a strong statement that your audience is sure to remember.

10

Use Audiovisual Aids Wisely.

Too many can break the direct connection to the audience, so use them sparingly. They should enhance or clarify your content, or capture and maintain your audience's attention. Good communication is never perfect, and nobody expects you to be perfect. However, putting in the requisite time to prepare will help you deliver a better speech. You may not be able to shake your nerves entirely, but you can learn to minimize them.

Capstone Presentation Rubric

This form offers guidelines for participants to follow during delivery of the Capstone Presentation. Please use it to offer the presenter constructive feedback, helpful suggestions, and guidance.

CONTENT

3 – 5 minutes in length

Included a specific, relatable situation, relevant challenge, honest struggle, or worthy lesson

Contained an intriguing 'hook' connected to the final message

Conveyed a lesson learned or a solution to a challenge

Included a powerful conclusion and (if appropriate) an audience call to action

DELIVERY

The presenter...

Appeared prepared

Delivered a compelling presentation appropriate for the audience

Used a conversational, enthusiastic, active voice, and professional tone


Conveyed executive presence and sincerity during the presentation

ADDITIONAL THOUGHTS

LEADERSHIP COMMITMENT CARD

You will complete a Leadership Commitment Card, which is your personal *Call to Action*.

Two versions of the Leadership Commitment Card are available under *Leadership Commitment Capstone* on the Jam site. One version is frameable while the other version can be used as a pocket or desk reference. Both examples are shown below.



LEADERSHIP COMMITMENT

As a leader, I pledge to Elevate Team Performance by:

1.
2.
3.



Elevate Participant

Program Director

Commitment Card

As a leader, I pledge to Elevate Team Performance by:

1.
2.
3.



Personal Inventory

Connection Card First Connection



REFLECTION QUESTIONS

- What was most memorable about your connection conversation?
- Was there an assumption that you made about that person that resulted in some sort of surprise?
- Is there a way you can make yourself more open and approachable?

Day 1 Review



REFLECTION QUESTIONS

- What 3 things stood out to me today about myself?
- What actions should I take tomorrow?

[illegible]



- How did your ELEVATE-r Pitch go?
- Are there any ways to revise or improve the pitch?

ELEVATE-r Pitch go?	

Day 2 Review



REFLECTION QUESTIONS

- What are the most impactful takeaways from today
- What initial thoughts do you have about the capstone task?

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

By three methods we may learn wisdom:

1. *By reflection,
which is the noblest*
2. *By imitation,
which is the easiest*
3. *By experience,
which is the bitterest*

- Confucius

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

*The world is a looking
glass and gives back to
every man the reflection
of his own face.*

- William Makepeace
Thackeray

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

*Guard your thoughts, for they become your words.
Guard your words, for they become your actions.
Guard your actions, for they become your habits.
Guard your habits, for they become your character.
Guard your character, for it WILL become your destiny.*

- Unknown

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

*It is not by muscle, speed,
or physical dexterity that
great things are achieved,
but by reflection, force of
character, and judgment.*

- Marcus Tullius Cicero

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

Without reflection, we go blindly on our way, creating more unintended consequences, and failing to achieve anything useful.

- Margaret J. Wheatley

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

QUOTE OF THE DAY

*Follow effective action
with quiet reflection.
From the quiet reflection
will come even more
effective action.*

- Peter Drucker

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

People who have had little self-reflection live life in a huge reality blind-spot.

- Brvant McGill

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

The feeling of being 'offended' is a warning indicator that is showing you where to look within yourself for unresolved issues.

- Bryant McGill

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

Unless you learn to face your own shadows, you will continue to see them in others, because the world outside you is only a reflection of the world inside you.

- Unknown

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

QUOTE OF THE DAY

Silent solitude makes true speech possible and personal. If I am not in touch with my own belovedness, then I cannot touch the sacredness of others. If I am estranged from myself, I am likewise a stranger to others.

- Brennan Manning

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

When a man or woman is truly honest, it is virtually impossible to insult them personally.

- Brennan Manning

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

We all want progress, but if you're on the wrong road, progress means doing an about-turn and walking back to the right road; in that case, the man who turns back soonest is the most progressive.

- CS Lewis

Today's Thoughts

DATE _____

[illegible]



- How did the coaching practice go?
- What tips or key takeaways did you observe in others?

Day 3 Review



REFLECTION QUESTIONS

- How can you improve your coaching skills using HPT and G.R.O.W.?
- What is the biggest takeaway from today? Why?

[illegible]



- What were your biggest challenges with the two communication activities this morning?
- What tips or key takeaways did you observe in others?

- What were your biggest challenges with the two communication activities this morning?
- What tips or key takeaways did you observe in others?

Day 4 Review



REFLECTION QUESTIONS

- How do you feel about your capstone presentation delivery?
- What is the biggest takeaway from today? Why?

[illegible]



- What are you going to do as a leader to improve your team's effectiveness through partnerships?
- What has really stood out to you in the last 2.5 days?

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

Leadership is not about titles, positions, or flow charts. It is about one life influencing another.

- John Maxwell

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

QUOTE OF THE DAY

Don't tell people how to do things, tell them what to do and let them surprise you with their results.

- George Patton

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

A leader takes people where they want to go. A great leader takes people where they don't necessarily want to go but ought to be.

- Rosalynn Carter

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

QUOTE OF THE DAY

Do not follow where the path may lead. Go instead where there is no path and leave a trail.

- Ralph Waldo Emerson

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Today's Thoughts

DATE _____

[illegible]

Today’s Thoughts

DATE

QUOTE OF THE DAY

Change will not come if we wait for some other person, or if we wait for some other time. We are the ones we’ve been waiting for. We are the change that we seek.

- Barack Obama

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Today's Thoughts

DATE

QUOTE OF THE DAY

If your objective is to be as good as you can be, then you're going to want criticism.

- Ray Dalio

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

*Show the man you honor
and I will know what kind
of man you are.*

- Thomas John Carlisle

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

*Between our dreams and
actions lies this world.*

- Bruce Springsteen

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

QUOTE OF THE DAY

I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.

- Maya Angelou

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE

QUOTE OF THE DAY

A leader is like a shepherd. He stays behind the flock, letting the most nimble go out ahead, whereupon the others follow, not realizing that all along they are being directed from behind.

- Nelson Mandela

Today's Thoughts

DATE _____

[illegible]

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Today's Thoughts

DATE _____

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Today's Thoughts

DATE

QUOTE OF THE DAY

Nearly all men can stand adversity, but if you want to test a man's character, give him power.

- Abraham Lincoln