

Program Guide and Reference Material

Includes:

- Leadership Motivations
- Changes to Focus
- Relationship Changes
- Managing Team Member Populations
- 10 Competencies Model of Outstanding Leadership
- DiSC and Leadership Transition

LEADERSHIP TRANSITION

Leadership Transition

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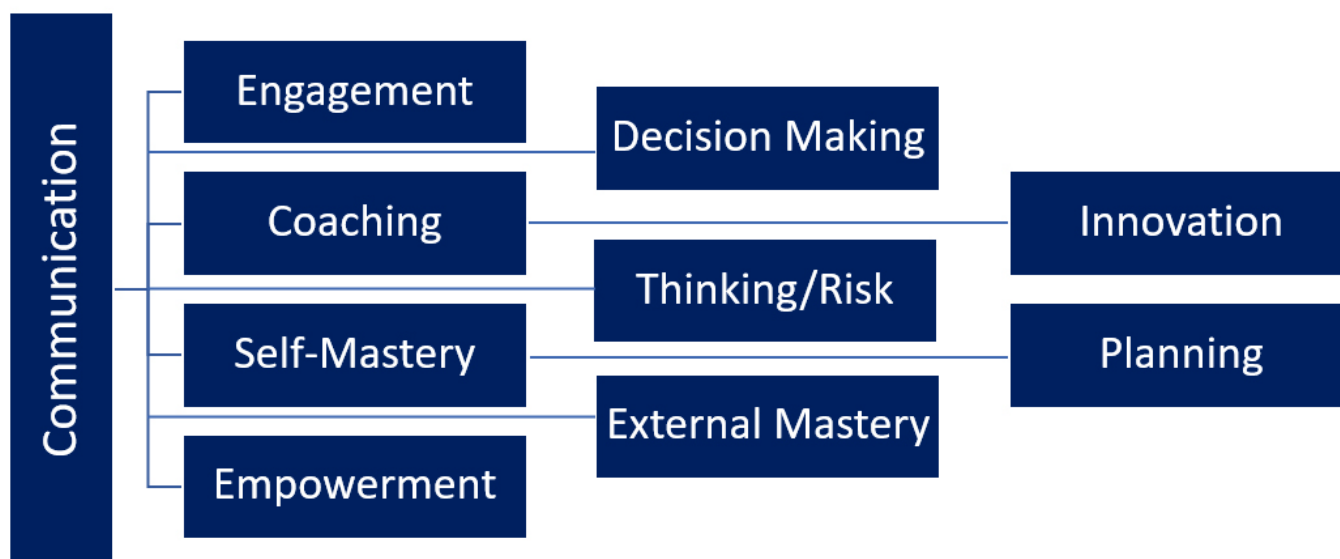
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The 10 Competencies of Outstanding Leadership:

The Aegis Learning Edge is a statistically accurate, empirically driven and best-practice validated model for leadership development. With 25 years of research and case studies, this copyrighted approach ensures that you have the proven techniques to succeed as a leader.



Successful Leaders		Failed Leaders
96%	Communication	7%
86%	Team Member Engagement	2%
85%	Coaching and Feedback	32%
84%	Self-Awareness and Self-Management	48%
81%	Empowerment and Delegation	63%
79%	Decision Making	45%
75%	Thinking and Risk	34%
74%	External Management	42%
71%	Innovation and Change	55%
67%	Planning and Vision	54%

1. Communication
2. Team Member Engagement
3. Coaching and Feedback
4. Self-Awareness and Self-Mastery
5. Empowerment and Delegation
6. Decision Making and Judgment
7. Thinking and Risk
8. External Management and Projection
9. Innovation and Change
10. Planning, Vision and Values

Cascade Effect:

The leadership model is built on a cascade. This means that each competency must be mastered before the next one can be engaged and utilized.

Leadership Core Principle:

Leadership is the art and science of getting people to do something because they want to do it for you.

**For unto
whomsoever
much is given,
of him much
will be
required.**

Luke 12:48

Leadership Transition:

The transition from a line level team member to a leadership position is one of, if not the most, challenging changes that will ever happen in your career. Similarly, a transition in or to leadership from a highly technical environment will also create challenges rooted in the core of who you are and how you operate.

Unlearning:

Before you can begin using and master new and highly successful leadership skills, you have to unlearn what you know about supervision and management to this point. Unlearning is as important as learning. If you want new and much better outcomes, you must be willing to utilize new skills and techniques.

Vocabulary Matters:

As a natural starting point in leadership, your vocabulary and choice of words matter. Begin using these terms and unlearning the old phrases and words:

1. Leader
 - Someone who guides people through engagement, communication, service, coaching and empowerment. Leadership is a people function.
2. Team Member
 - Those who work for and follow a leader.
3. Team
 - A group of team members assembled in an organization or department structure.

Similarly, remove these words from your vocabulary and cease using them:

1. Manager
 - Someone who manipulates a process or guides others through a procedure. Inventories, processes and workflow are managed.
2. Employee
3. Subordinate

Poor Leadership and Management:

Before any modern and outstanding leadership practices are embraced, a quick review of poor and arcane leadership:

1. Resists Change
 - Overly Reliant on Past Methods (Even if Successful)
 - Organizational Processes
 - Personal Skills
2. Lacks Respect for Team Members
 - No Solicitation of Ideas
 - Orders and Not Engages
3. Focus on Problem Resolution
 - Ego Fulfillment
 - Emphasizes Technical Skills
 - No Vision
4. Lacks Interest in Other Areas of Organization
5. Greatest Goal is to Stay in Budget
6. Preoccupied with Being Liked
 - No Courage
 - No Difficult Decisions
7. Emphasizes Dangers of Failure
8. Safe or Paternal Decision Making
9. Reduced Expectations for Performance
 - Does Not Challenge Team
 - Accepts Poor Quality
10. Savior Syndrome
 - Saves Team
 - No Accountability
 - No Empowerment

1. What are the motivations (or your motivations) for moving into a leadership role?
2. What things change when you become a leader?

**Being in the army
is like being in
the Boy Scouts,
except that the
Boy Scouts have
adult
supervision.**

Blake Clark

Skill: Leadership Motivations

Leadership Motivations:

Effective and healthy people examine their motivations for making a career change and those moving into a leadership position or moving higher in an organization are no different. Understanding your motivations will yield insight into your effectiveness as a leader and provide you the opportunity to align your motivations with your team.

Appropriate Motivations:

The motivations that ensure long-term leadership success and are respected, admired and appreciated by team members:

1. Assist and Serve the Team
 - Leadership is Service
 - Team Members are Customers
2. Make a Positive Organizational Difference/Make Things Better
3. You Have the Leadership Skills and Competencies to be a Leader
 - Not Arrogant
 - Accurate Self-Reflection
 - Comparisons are Acceptable
4. Achieve Greater Results for the Organization
5. Help Others Grow in Their Career
 - Mentoring
 - Growing Replacement
 - Paying Forward and Paying Back
6. Provide a Positive Role Model and Example
7. Influence Higher Levels of Decision Making
 - Process Changes
 - Organizational Culture and Direction

Inappropriate Motivations:

Similarly, there are a set of motivating factors that are not respected, admired or appreciated by team members. These factors are clearly seen by the team and can have devastating effects on morale, engagement and overall performance. They also damage the credibility of any leader.

1. Money
 - Can be a Motivator but Not Primary
 - Temporary and Low-Level Motivation
 - Defeats Service of Team Motivation
2. Exercise Control Over Others
 - Great Leadership is Empowering Not Controlling
3. Revenge
4. Career Growth
 - Can be a Motivator but Not Primary
 - Needs to be Private
 - Team Can Feel Used
5. Think Like and Act Like You
6. Tell Senior Leaders How Bad it is in the Department

**If there is no
struggle,
there is no
progress.**

Fredrick Douglass

Skill: Leadership Changes

Leadership Changes:

The world as you know it changes dramatically when you move into a leadership role. Successful leaders manage these changes quickly and begin working on them as soon as (sometimes before) they become a leader.

1. Doer to Leader

- It is No Longer What You Produce
- It is About Team Production and Work Product
- Most Significant of the Changes

2. Expertise

- As with Doing, It is Not What You Know
- Expertise is Overused and Disempowering
- Knowledge Transfer is Genuine Leadership
- Area of Extreme Discomfort and Ego Subordination

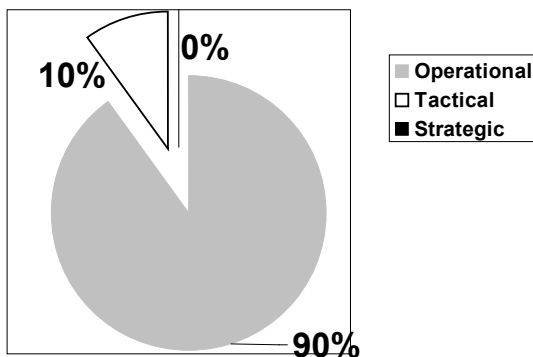
3. Relationships

- Friends are Now Team Members
- Adversaries are Now Team Members
- Evolution of All Relationships Must Occur
- Equality in Relationships Must be Obvious

4. Thinking Focus

- From Operational to Tactical and Strategic
- Not About Cases/Files/Situations but Why and How

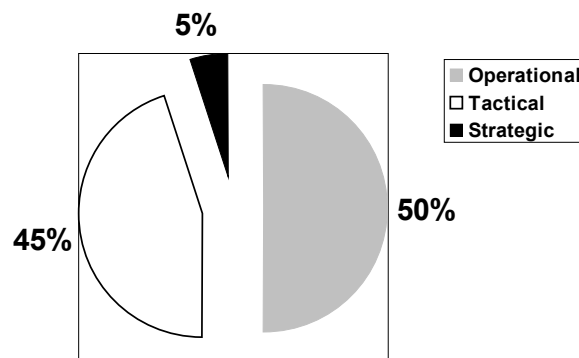
Time and Thought-Front Line Level



Operational-Day to day functions of an organization. The core service and product delivery. The doing.

Tactical-Coaching, reviewing and the quality control of operational functions. Includes team member reviews, disciplinary actions, training new people, reviewing work and reviewing processes.

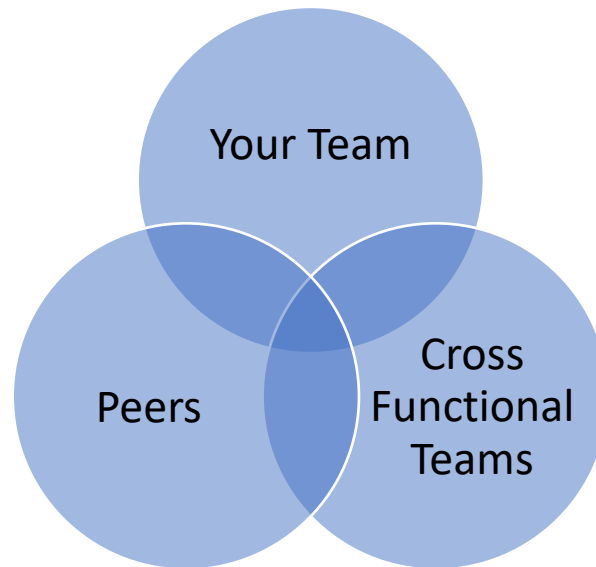
Time and Thought-Supervisory Level



Strategic-The long-term vision and direction of the organization. Collaborating with stakeholders for resources. Building the high-level relationships needed to execute the vision.

5. Responsibility

- Global Responsibility
- Serving Multiple Teams



6. Example and Role Model Behavior

- All Desired Behaviors
- No Grace Period or Time Off
- No Luxury of a Bad Day

7. Power of Your Words

- Opinions Okay as Line Level Team Member
- Now Become Official and Endorsements

8. Decision Making Impact

- Must be Equitable and Fair
- Have the Power of Department and Organization Precedent
- Can Create Policy
- Become Comfortable with Seeking Decision Time

9. Loyalty Point

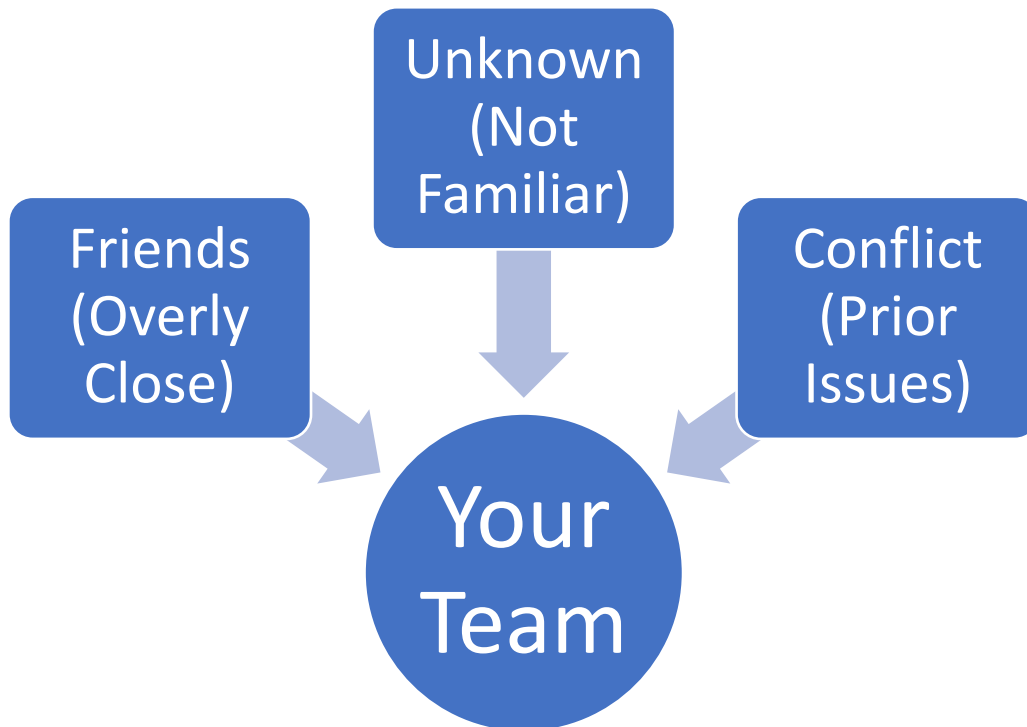
- Organizational Needs First
- Team Needs
- Personal Needs and Comfort are Last

9. Self-Mastery

- Self-Awareness
- Self-Control
- Understand the Impact of Behavior on Others

10. Mending Conflicts

- Leading Conflict Resolution
- Understands Needing Those in Prior Conflict
- Un-Mended Conflicts can Become Toxic



11. Never Ending

- Team and Organizational Needs Trump Personal Needs
- Not an Easy 40 Hour Function
- Personal Time and Balance Must be Managed
- Cannot Consume You
- Role Model Behaviors Don't Stop at Work

12. Transparency

- Over-Disclosure Leads to Credibility Loss
- Relational and Open but Guarded

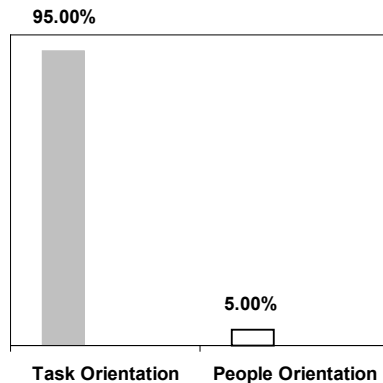
13. Appearance

- Part of Role Model Behavior
- Be Recognized as the Leader

14. Priorities

- Team Member Needs
- Organizational Needs

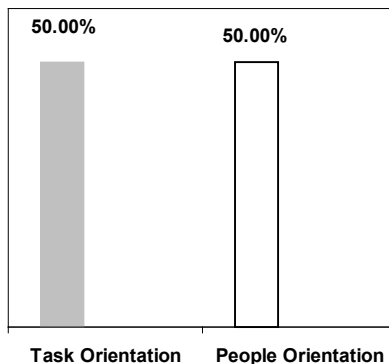
Focus-Front Line Level



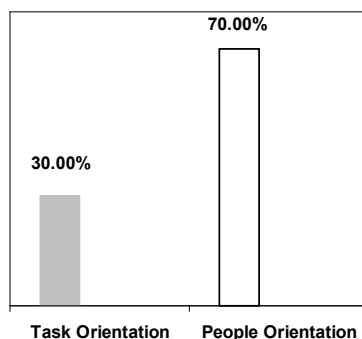
Task Orientation-Work production. Getting jobs, projects and tasks completed.

People Orientation-Building relationships and interacting with others. Meetings, coaching sessions and workplace visits are included.

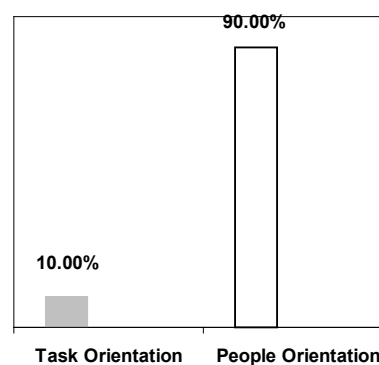
Focus-Supervisory Level



Focus-Management Level



Focus-Executive Level



Assumptions are the terminals of relationships.

Henry Winkler

Relationship Management:

Each of the three populations of your relationships require separate approaches and tactics to successfully enjoin them to the team. As a reminder, to be successful, you need all of these relationship populations to be performing at a high level.

The ultimate objective is to build level relationships with all team members regardless of the starting point and to be on friendly (this is a key concept) basis with all of them.

The three populations you will be managing are:

1. Friends
 - Those Overly Close
 - Friends from Line Level
2. Unknowns
 - Those Who You Do Not Know
 - Cursory Relationships
3. Conflicts
 - Those with Open Conflict
 - Prior Baggage or Disagreements
 - Might have Competed for Your Current Leadership Role

Tactics for Managing the Unknowns:

To better understand, relate to and connect with the unknown or little-known team members:

1. Get to Know Them (Duh)
2. Show Interest In Them
3. Ask About Them
4. Expand on What You May Already Know
5. Share a Little About Yourself
 - Not Your Resume
 - Not About You
 - Open the Door for a Relationship

Tactics for Managing Friends:

Any attempt to maintain a friendship with a directly or indirectly (through another leader or another level) friendship has significant risks to you. The potential for bus tire tracks on your chest is real. Those risks include:

1. The Appearance of Favoritism
 - Devastating to Team Morale
 - Trust of Other Team Members is Lost
2. Disloyalty
 - Social Needs Sacrificed When Base Needs Threatened (Maslow's Hierarchy)
 - Shared Confidential Information
3. Poor Judgment
 - Personal Relationship Clouds Assessment of Friend
 - Plays in Subconscious

Maintaining Friendships:

This is a high-risk proposition with a low probability of success. At a minimum, the nature of the friendship is going to change, and it has to change for you to be a leader. How both you and your friend react and respond to these changes will ultimately determine the success or failure of the relationship management. Largely, it will be out of your control. To attempt to maintain this friendship, use the following approach:

1. Understanding of the Risk is Clear
2. No Discussion of Personal Matters Occurs at Work
3. Boundaries are Clearly Articulated and Understood
4. Relationships are Managed Separately
 - Friends Outside of Work
 - Team Member and Leader at Work
5. Shared Interest in Success
 - For Leader
 - For Team Member/Friend

Friendly:

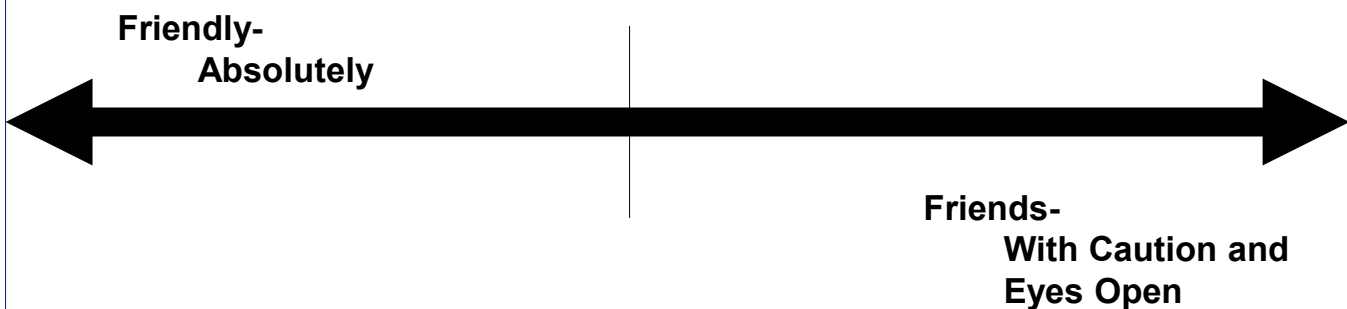
All team member relationships should be friendly. Those characteristics include:

1. Greeting and Using Their Name
2. Knowing Personal and Coming Information About Them
3. Communicate Openly
4. Establishment of Common Interests
5. Participation in Full Group Activities
6. Following-Up and Demonstrating Interest

Friends:

The characteristics of a friendship include:

1. Socializes and Spends Time Outside of Work
2. Frequent Lunches and Breaks
3. Knows Secrets and Confidential Information
4. Different Levels of Access
5. Different Level of Communication
6. Shared Jokes and Insider Comments



Evolving to Friendly Baseline:

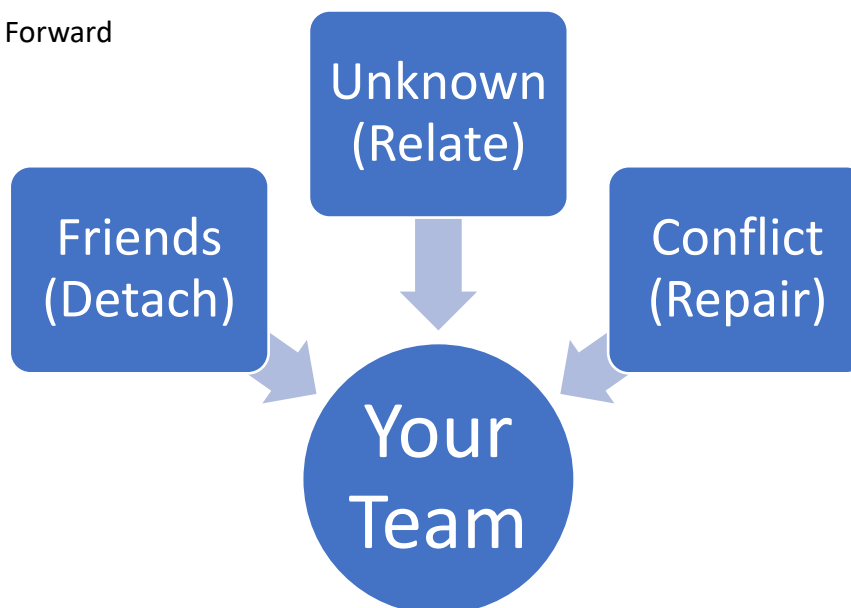
To move friendships to the common friendly level only, use the following approach:

1. Create Distance
 - Refuse Invitations
 - Often Effective as Only Approach
2. Be Honest
 - Discuss the Necessity
 - Does Not Diminish Care or Concern
3. Demonstrate Compassion
 - Not Abrupt or Harsh
 - Changes Done Over Time
4. Rise and Detach

Tactics for Managing Conflicts:

To repair the relationship with those in which you have open conflict, use these steps:

1. Own Your Part
 - Openly Acknowledge Your Role or Part
 - Accept any Misconceptions or Perceptions Humbly and Without Debate
2. Offer an Apology
 - Creates Baseline
 - NOT an Admission of Wrongdoing
 - Failure to Move Ahead Now on Other Person
3. Ask to Move Forward



Leadership Style:

All people have different leadership styles. The most commonly noted are:

- Direct
- Relational
- Low Key
- Detailed

Aegis Learning uses DiSC science to determine leadership styles and to build skills related to that.

DiSC is an acronym that stands for:

- Dominance
- Influence
- Steadiness
- Conscientiousness

The DiSC science, pioneered by Dr. William Marston has been used by over 30 million people and the current versions found in the Everything DiSC Workplace, Management and Leadership assessments are highly accurate and predictive because of the use of adaptive testing.

Each person is comprised of a primary behavioral influence in the DiSC assessment. This is the first letter of the descriptor and where your dot is located in the DiSC graph. This primary behavioral influence will drive a great deal of your leadership approach.

Behavioral intensity also matters greatly. Your intensity is determined by the relative distance of your graph dot from the outer circle of the graph. The farther out your dot is, the more intense in that style and predictable you are. The closer in, the less predictable and easier for you to chameleon your communication style.



DiSC Leader Styles and Approaches:

Each DiSC behavioral style has a unique set of preferred environments.

Dominance (D)

- Fast Paced
- Objectives and Purpose
- Decisions from Emotion (Gut)
- Quick Reactions
- Conflict is Win/Lose
- Take Over Environments
- “What” Matters

Influence (i)

- Relaxed and Social
- Personal Interaction
- Upbeat and Animated
- Decisions from Emotion (Heart)
- Quick Reactions
- Make Peace in Conflict
- Entertain and Spotlight
- “Who” Matters

Steadiness (S)

- Predictable Pace and Routine
- Values Sincerity
- Calms Excited People and Situations
- Decisions from Logic (Mind)
- Listens Effectively and Carefully
- Picks Best Solution in Conflict
- “Why” Matters

Conscientiousness (C)

- Detail and Accuracy Driven
- Calm and Rational
- Decisions from Logic (Mind)
- Needs to be Right
- Often Critiques
- Proves Correctness in Conflict
- “How” Matters

The most effective leaders are those that understand their style and approach but yet adapt consistently and constantly to the needs of their team and team members. The burden of this adaptation rests solely with the leader. It is your job to adapt.

**Lead and inspire
people. Don't try
to manage and
manipulate
people. Inventories
can be managed
but people must
be led.**

Ross Perot

Tim Schneider, PhD., MBA, BS/BA Dual
 Founder, CEO, Project Lead and Senior Facilitator
 Published Author and Source
 30+ years-Leadership, Teamwork, Customer
 Service and Professional Development
 Certified Facilitator, Trainer, Speaker and Coach

Tim Schneider is the founder and lead facilitator for Aegis Learning.

His mission, in total alignment with Aegis Learning is “Dedicated to Your Success”. Tim brings passion, heart and 30 years of successful experience to all leadership development projects, customer service initiatives and when building high performance teams.

Tim is the author of **LeadWell-The Ten Competencies of Outstanding Leadership**, **Beyond Engagement**, **RISE – Creating Unlimited Happiness**, and **A Heart for Leadership**; high impact books about leading the right way and creating an organizational culture that is both healthy and successful. His works have been featured in many business and professional development publications and he is one of the most sought-after speakers, trainers and coaches in the United States. Stylistically, Tim brings unparalleled commitment and enthusiasm to each engagement and works hard to make sure all participants not only learn but have fun along the way.



Danielle Weible, MBA, BS
 Vice President and Certified Facilitator
 5+ years-Leadership and Professional Development

Danielle holds a Bachelor of Arts in Psychology with a minor in Education, as well as a Master's Certificate in Public Administration. With a solid foundation in psychology and education, she brings a deep understanding of human behavior and effective learning strategies to each role. Her background is complemented by hands-on experience in coaching and leadership, where she has successfully guided teams and individuals to reach both personal and organizational goals.

Throughout her career, she has demonstrated a unique ability to inspire and empower others, focusing on developing strengths, fostering a growth mindset, and creating a positive, results-driven environment. Her expertise in public administration adds a strategic dimension to their leadership style, allowing her to navigate complex organizational challenges while prioritizing efficient, community-oriented solutions.

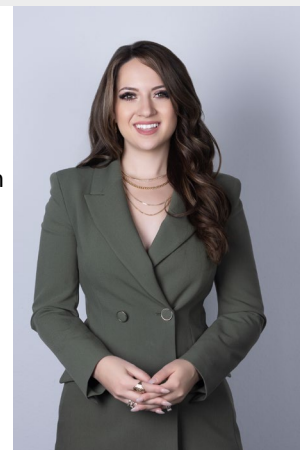
In her personal time, Danielle enjoys spending quality time with family, valuing the balance between professional dedication and personal connections. Committed to lifelong learning and continuous improvement, she aims to make a meaningful impact in every role they take on, contributing to sustainable growth and positive change.



Lisa Nelsen, BA
 Certified Senior Facilitator and Coach
 5+ years-Leadership and Teamwork Development

Her Lisa Nelsen is a speaker, facilitator, and author of The Effort Gap, a personal growth platform that helps people bridge the space between knowing and doing. Her work explores how people really grow—in relationships and community—through clarity of thought, self-leadership, and genuine human connection.

Lisa's career has spanned small businesses, advertising agencies like R&R Partners and MassMedia Corporate Communications, and the nonprofit sector. As Director of Communications and Development for Opportunity 180, she helped the organization secure over \$25 million to increase access to quality public schools in Nevada's high-poverty neighborhoods. In 2020, Lisa launched Coruzzi Communications, a branding and strategic communications firm serving nonprofits and their mission-driven partners.



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Aegis Learning delivers. Delivers the best training, coaching and organizational development services available. Our offerings include:

☐ **Leadership Development**

- Based on the Ten Competency Model
- Empirically Driven, Statistically Accurate Approach
- 25 Years of Best Practices
- Training
- Coaching
- Follow-Up Tools
- Talent Identification and Succession

☐ **Customer Service Initiatives**

- Training
- Process Review

☐ **High Performance Team Building**

- Core Team Competencies
- Trust, Respect, Conflict and Communication

☐ **Assessments**

- DiSC Workplace, Management and Leadership
- 5 Behaviors of a Cohesive Team
- Certified Facilitator and 15 Year Award Winner

☐ **Individual Development Coaching**

- Accountability and Holistically Based
- Leadership, Professional Development and Personal Achievement

☐ **Retreats**

- Maximum Impact Environment
- Strategic Planning, Team Building and Leadership Development

☐ **Speaking and Keynotes**

- Fun and Impactful
- Leadership, Teamwork, Customer Service and Personal Development

☐ **Talent Management and Consulting**

- Engagement Enhancement
- Talent Identification and Succession
- Key Processes
- Organizational Structure

☐ **Books**

- *LeadWell-The Ten Competencies of Outstanding Leadership*
- *Beyond Engagement*

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