

# TALENT UNLEASHED



3 LEADERSHIP CONVERSATIONS TO IGNITE  
THE UNLIMITED POTENTIAL IN PEOPLE

Appendix A & B

# APPENDIX A

## 3 Leadership Conversations

Transparent Agenda



### VOICE

“This voice also encompasses the soul of organizations that will survive, thrive, and profoundly impact the future of the world.

Voice is *unique personal significance*—significance that is revealed as we face our greatest challenges and which makes us equal to them.

Voice lies at the nexus of *talent* (your natural gifts and strengths), *passion* (those things that naturally energize, excite, motivate, and inspire you), *need* (including what the world needs enough to pay you for), and *conscience* (that still, small voice within that assures you of what is right and that prompts you to actually do it). When you engage in work that taps your talent and fuels your passion—that rises out of a great need in the world that you feel drawn by conscience to meet—therein lies your voice, your calling, your soul’s code.”

**STEPHEN R. COVEY, *THE 8TH HABIT***

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### 3 Leadership Conversations

Transparent Agenda



## VOICE

**Intent:** To help each individual recognize and make unique and meaningful contributions.



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## VOICE

**How to Use:** Ask each question and then add your perspective—or use your answers to the questions to generate a conversation with the other person.

#### 1. NEED (external or internal)

- a. What unmet needs and opportunities do you see among our customers, within our business, or in the marketplace?
- b. What is the ONE thing you could do to make the greatest contribution?

#### 2. PASSION

- a. What have you always loved doing?
- b. What job or career-related opportunities are you most excited about?

#### 3. TALENT

- a. What are your interests, talents, and capabilities and how could you develop them further?
- b. What could you do well that you're not currently doing?

#### 4. CONSCIENCE

- a. What values or principles are most important to you?
- b. What part of your work do you feel best about, and what would make it more meaningful?

**3 Leadership Conversations**  
Transparent Agenda



**VOICE CONVERSATION  
WATCHOUTS**

**Attitudes to Avoid**

- “This ‘voice’ stuff is irrelevant; *my* job is to make sure people do *their* job.”
- “We talk about people’s potential in their annual performance review.”
- “I’ll do this if I have time.”
- “Who cares if people are *fired up* as long as they’re doing the job they were hired to do?”
- “I assume people will naturally trust me enough to share what’s important to them.”
- “I already know what’s important to others.”
- “As long as we’re making money, what does it matter?”

## 3 Leadership Conversations Transparent Agenda



### PERFORMANCE

In a well-conducted performance conversation, the individual worker agrees on **what** is important, **why** it is important, **how** it is to be accomplished, and how it can be **tracked and improved**. The worker begins to both see and share commitment to the overall organizational vision, mission, strategies, and goals. It is not a one-way conversation, particularly when the worker is not new on the job. It is a win-win-win conversation—a win for the organization, a win for the boss, and a win for the worker in helping them align and achieve their most important goals and objectives.

#### *TALENT UNLEASHED*

“As a rule there are in everyone all sorts of good ideas, ready like tinder. But much of this tinder catches fire...only when it meets some flame or spark...from some other person.”

-ALBERT SCHWEITZER

# TALENT UNLEASHED



## 3 Leadership Conversations

Transparent Agenda



### 1 – DESIRED RESULTS

**How to Use:** Discuss and come to an agreement on each factor listed below.

#### What needs to be done?

1. What are the team's top two or three goals?
2. How will we measure success?
3. What are your top two or three individual goals—the goals you need to achieve in order to make your contribution?
4. How do your individual goals connect to the team's top goals? Why are your goals important?
5. Are your goals realistic and achievable?
6. How have you translated these goals into plans (i.e., who will do what by when)?
7. How will you measure your success?

#### Watchouts

- Avoid taking on too many goals.
- Don't be one-sided or dictatorial. Listen with the intent to understand.



## 3 Leadership Conversations

Transparent Agenda



## 2—GUIDELINES

**How to Use:** Discuss and come to an agreement on each factor listed below.

### What standards need to be met?

1. What other people need to be involved in this conversation, and what are their expectations?
2. How will your work impact other teams or functions?
3. What policies and/or procedures are in place?
4. Are there any related ecological, quality, safety, or legal requirements to consider?
5. Are there any political or cultural dynamics to consider?

### Watchouts

- Don't create unnecessary policies.
- Don't ignore essential policies.

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### 3—RESOURCES

**How to Use:** Discuss and come to an agreement on each factor listed below.

#### Who/what is needed to accomplish the desired results?

1. What people and other resources (e.g., information, financial, training, etc.) are needed and available?
2. Who can authorize access to the necessary resources?
3. What potential barriers need to be resolved?
4. Is there “game-changing” information or technology that could be utilized?
5. Are there any people or resources that could be repurposed?

#### Watchouts

- Don't give up too quickly. Is there a different way to obtain the necessary resources?

## 3 Leadership Conversations Transparent Agenda



## 4 – ACCOUNTABILITY

**How to Use:** Discuss and come to an agreement on each factor listed below.

### How will we track performance?

1. What are the measurable, influenceable, and predictive activities (lead indicators)?
2. Who will receive information and how will tracking take place?
3. What key milestones will be achieved along the way?
4. How often will we meet to review progress?
5. If necessary, how will we modify our agreement?

### Watchouts

- Don't forget that accountability is a two-way, agreement-based process. It is something you *share*, not something you *do* to someone.
- Don't assume that frequent accountability will take place without a systematized communication and review process.
- Don't use accountability as a threat. Instead, use it as a process for creating meaning and engagement.

## 3 Leadership Conversations

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### 5 – CONSEQUENCES

**How to Use:** Discuss and come to an agreement on each factor listed below.

1. When goals are achieved, what are the implications:
  - For the customer (internal/external)?
  - For the organization?
  - For the team?
  - For the individual?
  - For other stakeholders?
2. If goals are not achieved, what are the implications:
  - For the customer (internal/external)?
  - For the organization?
  - For the team?
  - For the individual?
  - For other stakeholders?
3. Are modifications to the agreement needed?

#### Watchouts

- Avoid creating unintended expectations.

**3 Leadership Conversations**  
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**PERFORMANCE CONVERSATION  
WATCHOUTS**

**Avoid**

- Assuming people know where to focus.
- Listening to reply rather than to understand.
- Failing to differentiate between the *many important tasks* and the *vital few*.
- Failing to make specific links to overall organizational objectives.
- Giving superficial attention to issues, questions, and challenges.
- Pushing your agenda rather than seeking mutual agreement.

## 3 Leadership Conversations

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### **CLEAR-THE-PATH**

Leaders can be a source of help to those they lead.

They can look ahead and try to discern what may be needed. They can watch and learn from what the team is doing and see what team members need to keep going and/or improve. They can then teach or pass on what they learn. They can coach. They can help prevent problems and anticipate opportunities. Each team member can work within his or her Circle of Influence to help and support others. This is how quantum performance improvement comes.

*TALENT UNLEASHED*

3 Leadership Conversations  
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CLEAR-THE-PATH

**Intent:** To remove barriers and obstacles and discover new and better ways to accomplish shared goals.



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### CLEAR-THE-PATH

**How to Use:** Ask each question—or use your answers to the questions to generate a discussion or make a request.

#### Questions:

1. What are you working on and how is it going?
2. What are you learning?
3. What obstacles are getting in your way?
4. If you could change one thing to improve your progress, what would it be?
5. What can team members do to remove barriers for each other?
6. What new opportunities are you seeing?
7. How can I best help you?



**3 Leadership Conversations**  
Transparent Agenda



**CLEAR-THE-PATH  
CONVERSATION WATCHOUTS**

**Attitudes to Avoid**

- “If people need me, they know where to find me.”
- “I’m already working long hours just to stay on top of what others are supposed to be doing.”
- “I’ve got all the answers.”

## 3 Leadership Conversations

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### FOUR GOVERNING PRINCIPLES

#### Principle 1: Contribution

- Make a positive difference.
- Add value.

OPPOSITE: Greed, apathy, selfishness

#### Principle 2: Trust

- Be trustworthy.
- Make and keep commitments.

OPPOSITE: Distrust, suspicion, cynicism

#### Principle 3: Synergy

- Merge differences in unity of purpose to create a power greater than the sum of the parts.

OPPOSITE: Scarcity

#### Principle 4: Empathy

- Listen to genuinely understand.

OPPOSITE: Listen with intent to judge, criticize, editorialize, prepare a response, or share your own autobiography.

## 3 Leadership Conversations

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### Reminders

- You are having conversations all the time—intentional or unintentional, formal, or informal. Make sure you are communicating what you want to communicate.
- Everyone has potential for extraordinary contribution. Make sure you “see” the people you work with as expanding, growing contributors with unique and extraordinary contributions to make.

### Opportunities

- You observe a team member who does not seem enthused about work or who doubts his or her ability. This is your chance to have a meaningful “Voice Conversation.”
- You observe an individual or team that seems to be working hard but not really achieving meaningful results. This is your chance to have a quality “Performance Conversation.”
- You see your team working hard, but you want to facilitate greater results. This is your opportunity to have a helpful “Clear-the-Path Conversation.”

# APPENDIX B

## WIN-WIN PERFORMANCE AGREEMENT

**Agreement Between** \_\_\_\_\_ **Date** \_\_\_\_\_

**Contribution Statement:**

### **Desired Results**

What are the results you are trying to achieve?

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### **Guidelines**

What key criteria, standards, policies, or procedures should be followed?

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### **Resources**

What people, budget, and tools are available?

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### **Accountability**

How will we give feedback? How often?

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### **Consequences**

What are the rewards if the agreement is fulfilled?

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What are the consequences if the agreement is not fulfilled?

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# TALENT UNLEASHED

## WIN-WIN PERFORMANCE AGREEMENT

Agreement Between VP of Sales and Jackie Date September 1

### Contribution Statement

I will bring my deep project-management expertise and people-leadership skills to help my department and our company achieve our sales goals.

### Desired Results

What are the results you are trying to achieve?

- To be an effective project leader with full ownership for training of account executives on a new "go to market" approach of our product.
- To meet quarterly and meet annual sales goals with new products.
- To engage in new and challenging opportunities that provide ongoing learning and development experiences.

### Guidelines

What key criteria, standards, policies, or procedures should be followed?

- Weekly communication with Sales and Marketing leaders are to be attended in person.
- Training on the new product must be done while the current product continues to be successfully marketed and sold.

### Resources

What people, budget, and tools are available?

- Administrative assistance from the sales leader's current support staff.
- Predetermined budgets for training and ongoing coaching meetings.
- 10 to 15 hours a week of assistance from existing members of the training team.

### Accountability

How will we give feedback? How often?

- Weekly update meetings will be held each Monday where progress will be shared.
- The Product Rollout Scoreboard will be updated daily with current information.
- A monthly meeting with the sales leader will be held to review the overall progress and make any needed adjustments.

### Consequences

What are the rewards if the agreement is fulfilled?

- The company hits and exceeds revenue targets for new product.
- I gain additional experience with new opportunities using the previously "untapped" talent.
- I receive bonus pay tied to the success of revenue targets.

What are the consequences if the agreement is not fulfilled?

- Both the company and I fail to receive the positive consequences listed above.

## **ABOUT THE AUTHORS**

*Bios on Roger Merrill, Todd Davis,  
Michael K. Simpson, and Shawn D. Moon  
are on the pages that follow.*

## SHAWN D. MOON

*Executive Vice President, Strategic Markets,  
FranklinCovey*

Shawn Moon is a co-author of *Talent Unleashed: 3 Leadership Conversations to Ignite the Unlimited Potential in People*, FranklinCovey's newest book of powerful leadership insights and practices. This book highlights liberating concepts, conversations, and principles built to inspire leaders and their teams to create a culture that is rich in trust, clarity, and empowerment. The author shares knowledge gained from working with thousands of corporate leaders in industries spanning the global workforce.

Moon has nearly 30 years experience in leadership and management, sales and marketing, program development, and consulting services. His deep knowledge and robust experience inspires others to become leaders through personal effectiveness and execution.

In his role as Executive Vice President at FranklinCovey, Moon is responsible for the company's U.S. and international direct offices, the Sales Performance Practice, and the Execution and Speed of Trust Practices. Additionally, he oversees FranklinCovey's Government Business, Facilitator Initiatives, and Public Programs.

Moon was previously a Principal with Mellon Financial Corporation where he was responsible for business development for their Human Resources outsourcing services. He coordinated activities within the consulting and advisory community for Mellon Human Resources and Investor Solutions. Prior to November 2002, Moon served as the company's Vice-President of Business Development for its Training Process Outsourcing Group, managing vertical market sales for nine of the company's business units, and managed the eastern regional sales office.

Moon is the author of *The Ultimate Competitive Advantage: Why Your People Make All the Difference* and *6 Practices You Need to Engage Them*, as well as several white papers and monographs

that outline essential tactics for building a winning culture. Shawn is a member of the Association for Talent Development (ATD) and sits on the boards of Zerorez® and the Utah Regional Ballet.



## **TODD DAVIS**

*Chief People Officer and Executive Vice President,  
FranklinCovey*

Todd Davis is a co-author of *Talent Unleashed: 3 Leadership Conversations to Ignite the Unlimited Potential in People*, FranklinCovey's newest book of powerful leadership insights and practices. The book highlights liberating concepts, conversations, and principles built to inspire leaders and their teams to create a culture that is rich in trust, clarity, and empowerment. The author shares knowledge gained from working with thousands of corporate leaders in industries that span the global workforce.

Over the past 30 years, Davis has practiced and refined his skills and knowledge of human resources, talent development, executive recruiting, sales, and marketing. With FranklinCovey for more than 20 years, he currently serves as Executive Vice President and Chief People Officer. As a member of FranklinCovey's executive team, Davis is responsible for global talent development, which includes more than 40 offices in 160 countries.

Prior to this role, Davis was a Director for FranklinCovey's Innovations Group. In this vital role, he led the development of content in many of FranklinCovey's core offerings. Davis contributes to the development of new offerings, containing the company's world renowned content.

Davis also served as FranklinCovey's Director of Recruitment for several years, where he led a team responsible for attracting, hiring, and retaining top talent for the organization, which included more than 3,500 employees.

For more than 25 years, Davis has been entertaining and inspiring people throughout the world with his deep understanding of leadership, employee engagement, and talent management. He has delivered numerous keynote addresses and speeches at top industry conferences and associations, at annual corporate events, and for FranklinCovey clients, many of which are Fortune 100 and 500

companies. His topics include leadership, personal and interpersonal effectiveness, employee engagement, talent management, culture, and change management.

Prior to FranklinCovey, Davis worked in the medical industry for a decade, recruiting physicians and medical executives, as well as marketing physician services to hospitals and clients throughout the U.S.

Davis served on the Board of Directors for HR.com and is a member of the Association for Talent Development (ATD) and the Society for Human Resource Management.

## **MICHAEL SIMPSON**

*Global Managing Director for Executive Coaching,  
FranklinCovey*

Michael Simpson is co-author of *Talent Unleashed: 3 Leadership Conversations to Ignite the Unlimited Potential in People*, FranklinCovey's newest book of powerful leadership insights and practices. This book highlights liberating concepts, conversations, and principles built to inspire leaders and their teams to create a culture that is rich in trust, clarity, and empowerment. The author shares knowledge gained from working with thousands of corporate leaders in industries spanning the global workforce.

For 30 years, Simpson has been an internationally sought after executive coach, leadership consultant, and keynote speaker. His practical, business experience is in teaching, advising, and coaching many of the world's top business leaders and teams. He coached and consulted with leaders in over 35 countries in leadership development, strategic planning, goal execution, building high performance-based teams, and high trust organizational cultures.

For the past 21 years, Simpson has been a Global Delivery Senior Consultant in FranklinCovey's Strategy Execution, Leadership, and Trust Practices. He is co-founder and Global Managing Director for the FranklinCovey-Columbia University Executive Coaching Certification Program.

Simpson was formerly a Principal Consultant for the global management consulting firms Ernst & Young (EY) Change Management Practice in Washington, D.C. and PricewaterhouseCooper's (PwC) Strategic and Organizational Change Practice in New York, NY. He held executive leadership positions for two leading technology companies as Vice President of Sales and Marketing and Vice President of Business Development.

Simpson holds a master's in Organizational Behavior from Columbia University and a bachelor's from Brigham Young University's Kennedy School of International Relations. He holds a

Graduate Studies Certificate in Conflict Resolution and Mediation from Columbia's International Center for Cooperation and Conflict Resolution (ICCCR). He is a certified executive coach from Columbia's Executive Coaching Certification Program; a certified coach from Marshall Goldsmith's Stakeholder Executive Coaching program; a certified coach with Inside-out GROW coaching; and a certified coach from University of Maryland's The Art and Practice of Coaching Leaders.

Simpson has authored several leadership and coaching books and articles including: *Unlocking Potential: 7 Coaching Skills That Transform Individuals, Teams, and Organizations*; *Ready, Aim, Excel; Your Seeds of Greatness: 10,000 of the World's Greatest Leadership Quotes*; *The Execution-focused Leader*; and *Building Team and Organizational Trust* with Stephen M.R. Covey.

## A. ROGER MERRILL

### *Executive Coach, Consultant, and Bestselling Author*

Roger Merrill is a co-author of *Talent Unleashed: 3 Leadership Conversations to Ignite the Unlimited Potential in People*, Franklin-Covey's newest book of powerful leadership insights and practices. This book highlights liberating concepts, conversations, and principles built to inspire leaders and their teams to create a culture that is rich in trust, clarity, and empowerment. The author shares knowledge gained from working with thousands of corporate leaders in industries spanning the global workforce.

Merrill has more than 40 years of experience as a line manager, senior executive, executive coach, consultant, and teacher, and was one of the co-founders of Covey Leadership Center (now Franklin-Covey Co.). Merrill specializes in coaching senior leaders and helping organizations improve performance and develop leaders.

As an executive coach, speaker, consultant, and trainer, Merrill has worked with over 600 different organizations in more than 30 countries and addressed domestic and international audiences ranging to more than 20,000. He holds a degree in business management and has done extensive graduate work in organizational behavior and adult learning.

Merrill is co-author (with Stephen R. Covey and Rebecca R. Merrill) of the international best seller *First Things First*. He is the author of *Connections: Quadrant II Time Management*, co-author of *The Nature of Leadership*, and contributing author to *Principle-Centered Leadership*. His book *Life Matters: Creating a Dynamic Balance of Work, Family, Time, and Money* (co-authored with his wife, Rebecca) was recognized by Soundview Executive Summaries as one of the 30 best business books of 2004. As a writer and thought leader, his books have sold over 2.5 million copies and have been translated into more than a dozen languages.

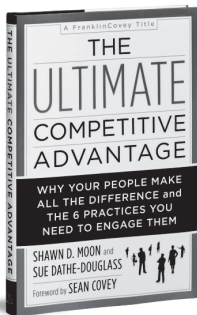
# “PEOPLE ARE OUR **MOST IMPORTANT ASSET.**”

Every company pays lip service to this platitude, but **how many companies really embrace it?**

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People can sustain—or ruin—your brand. If your people lack excitement, are indifferent, or even feel alienated from the company, your competitive advantage will disappear.



In *The Ultimate Competitive Advantage*, FranklinCovey thought leaders Shawn D. Moon and Sue Dathe-Douglass, lay out the steps leaders can take to tap into their organizations' most valuable and unique resource: **people**.

From the company that brought you *The 7 Habits of Highly Effective People*, *The Ultimate Competitive Advantage* offers six highly effective practices that will propel your organization to success by unleashing the potential of your people.

Each practice in *The Ultimate Competitive Advantage* is based on fundamental principles that hold true across all cultures, industries, organizations, and agencies, from the necessity of being proactive to the importance of building win-win, high trust relationships, to executing strategy effectively. Implementing these practices is the key to making a distinctive difference in the marketplace.

*The Ultimate Competitive Advantage* will enable your organization to achieve remarkable results and become an industry standout by leveraging your most important asset: your people.

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## **THE ULTIMATE COMPETITIVE ADVANTAGE**

FranklinCovey is a global company specializing in organizational performance improvement. We help organizations achieve results that require a change in human behavior.

Our expertise is in seven areas:

### **LEADERSHIP**

Develops highly effective leaders who engage others to achieve results.

### **EXECUTION**

Enables organizations to execute strategies that require a change in human behavior.

### **PRODUCTIVITY**

Equips people to make high-value choices and execute with excellence in the midst of competing priorities.

### **TRUST**

Builds a high-trust culture of collaboration and engagement, resulting in greater speed and lower costs.

### **SALES PERFORMANCE**

Transforms the buyer-seller relationship by helping clients succeed.

### **CUSTOMER LOYALTY**

Drives faster growth and improves frontline performance with accurate customer- and employee-loyalty data.

### **EDUCATION**

Helps schools transform their performance by unleashing the greatness in every educator and student.

# ATTEND A COMPLIMENTARY WEBCAST

Join one of our experts for a complimentary, live webcast and learn more about the *3 Leadership Conversations to Ignite the Unlimited Potential in People*.

FranklinCovey offers live webcasts in a variety of areas related to Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, and Education.

For more information, or to register, visit [www.franklincovey.com/webcast-series](http://www.franklincovey.com/webcast-series).



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The 13 Behaviors that will Increase Engagement and Trust: *Leading at the Speed of Trust®*



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Complete Your Projects on Time, on Budget, and on the Mark: *Project Management Essentials for the Unofficial Project Manager®*



Inspire Trust and Build Credibility as a Leader: *Leadership: Great Leaders, Great Teams, Great Results®*