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# SITUATIONAL LEADERSHIP® II

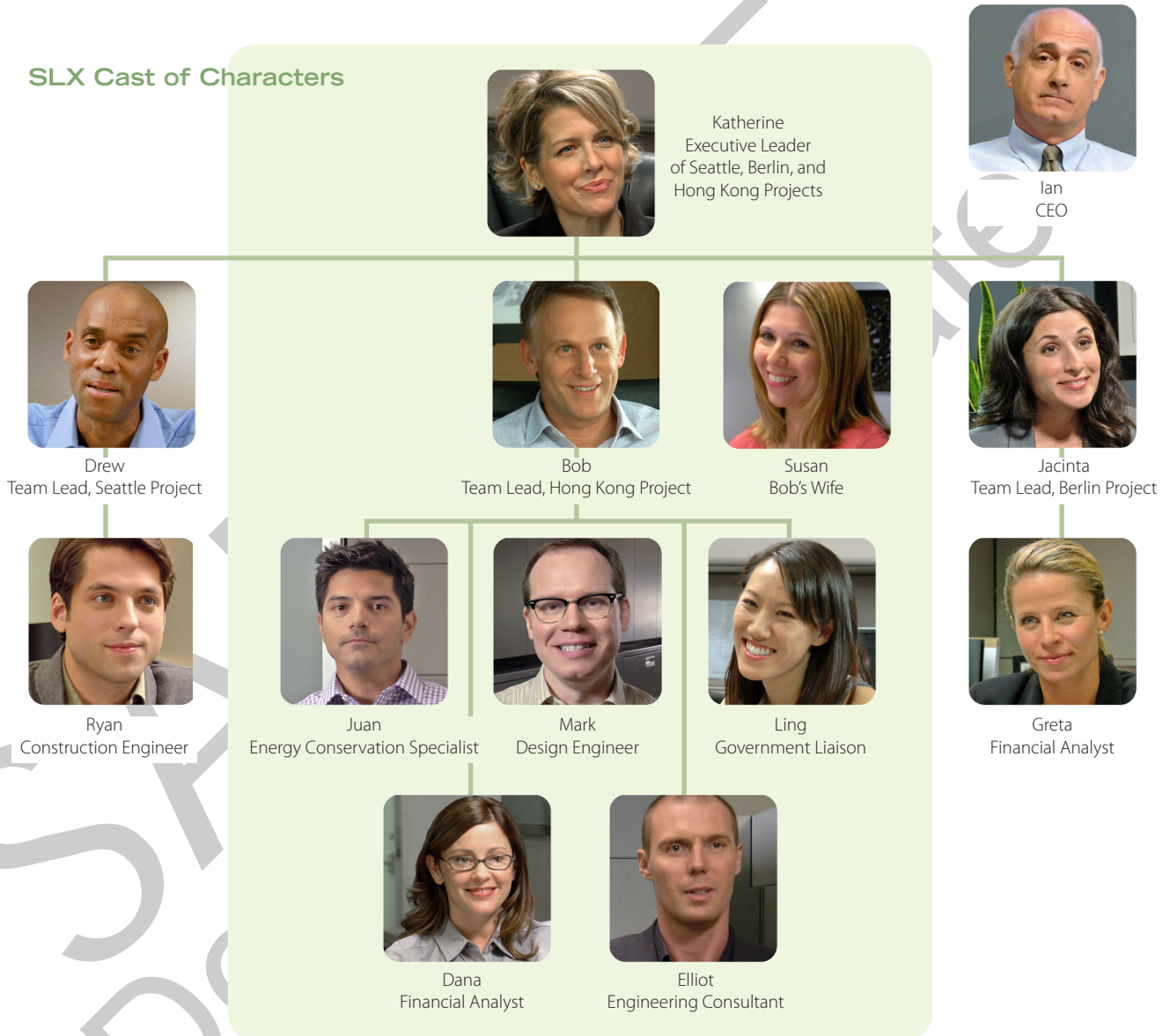
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# The SLX Story

SLX is a global, matrixed organization that is redesigning and reconstructing its facilities to make them more environmentally friendly—or “green.” There are three projects underway—in Seattle, Berlin, and Hong Kong.

## SLX Cast of Characters



## The Dilemma

The Hong Kong project is behind schedule and has not been approved by the Hong Kong government for two reasons: Mark's design for the cooling system has been rejected three times; and Juan is pushing for higher environmental standards that have not been approved.

# Best Leader/Worst Leader in Action



Mark

**GOAL:** To work with his team to solve the Hong Kong cooling system problem, so that the design can be resubmitted for approval in the next month



Clues about Competence

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How competent is Mark on this goal?

Competent ----- Moderately Competent ----- Somewhat Competent ----- Not Competent

Clues about Commitment (motivation and confidence)

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How committed is Mark on this goal?

Very Committed ----- Somewhat Committed ----- Not Committed

What does Mark need?

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Mark is about to meet with Jacinta, who runs the Berlin project, but also leads the design engineering function.



Jacinta

# Three Skills of a Situational Leader

## 1 Goal Setting

Aligning on what needs to be done, when

## 2 Diagnosing

Collaboratively assessing an individual's competence and commitment on a specific goal or task

## 3 Matching

Using a variety of leadership styles, comfortably, to provide individuals with what they need

Alignment

Situational Leadership® II isn't something you do **to** people;  
it's something you do **with** people.

# Six SLII Conversations



Leader-Led **Alignment Conversations** are used to set SMART goals and tasks and to discuss the leadership style match for development level.

The four **Style Conversations** are used to develop competence and commitment.

Team Member-Led **One on One Conversations** help the leader provide team members with the leadership style response they want.

In these six conversations, Situational Leaders use the three skills of a Situational Leader to align on goals, development levels, and leadership styles.

## The **Value** of a **Common Language**

# Make Your Goals SMART Worksheet

## Goal Setting

As part of your LAUNCH assignments, you

1. Thought of an individual you lead who has the potential to develop
2. Identified three goals or key tasks that you would like this person to accomplish
3. Wrote each goal or task in terms of a "what needs to be done, when" statement

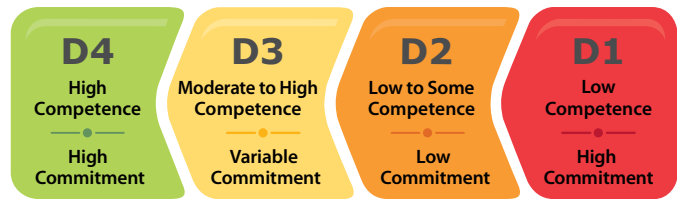
Now, rewrite each goal or task to be **Specific** and **Trackable**.

Think about how **Relevant**, **Attainable**, and **Motivating** each goal or task will be.

Goals for		
Goal or Task	Goal or Task	Goal or Task
<b>S</b> <i>What is the goal or task; when is it due?</i>	<b>S</b> <i>What is the goal or task; when is it due?</i>	<b>S</b> <i>What is the goal or task; when is it due?</i>
<b>T</b> <i>How will the goal or task be measured?</i>	<b>T</b> <i>How will the goal or task be measured?</i>	<b>T</b> <i>How will the goal or task be measured?</i>
Ask yourself: Is the goal or task ...	Ask yourself: Is the goal or task ...	Ask yourself: Is the goal or task ...
<b>R</b> <i>Relevant to the organization?</i>	<b>R</b> <i>Relevant to the organization?</i>	<b>R</b> <i>Relevant to the organization?</i>
<b>A</b> <i>Attainable for the individual?</i>	<b>A</b> <i>Attainable for the individual?</i>	<b>A</b> <i>Attainable for the individual?</i>
<b>M</b> <i>Motivating to the individual?</i>	<b>M</b> <i>Motivating to the individual?</i>	<b>M</b> <i>Motivating to the individual?</i>

**Prior to finalizing the goals or tasks, be sure to have a discussion with this individual about how Relevant, Attainable, and Motivating each will be.**

# Development Levels



## Development Level Descriptors

<b>D4</b>	High Competence High Commitment	<b>D3</b>	Moderate to High Competence Variable Commitment
<b>Competence</b> <ul style="list-style-type: none"> <li>■ Accomplished</li> <li>■ Consistently competent</li> <li>■ Recognized by others as an expert</li> </ul>		<b>Competence</b> <ul style="list-style-type: none"> <li>■ Demonstrated competence; experienced</li> <li>■ Makes productive contributions</li> <li>■ Generally skillful and adept</li> </ul>	
<b>Commitment</b> <ul style="list-style-type: none"> <li>■ Self-reliant; autonomous</li> <li>■ Justifiably confident; self-assured</li> <li>■ Inspired; inspires others</li> </ul>		<b>Commitment</b> <ul style="list-style-type: none"> <li>■ Sometimes hesitant, unsure, tentative</li> <li>■ Not always confident; self-critical</li> <li>■ May be bored or apathetic</li> </ul>	
Self-Reliant Achiever		Capable, but Cautious, Contributor	

**Is successful;  
knows how**

**Development level is goal or task specific!**

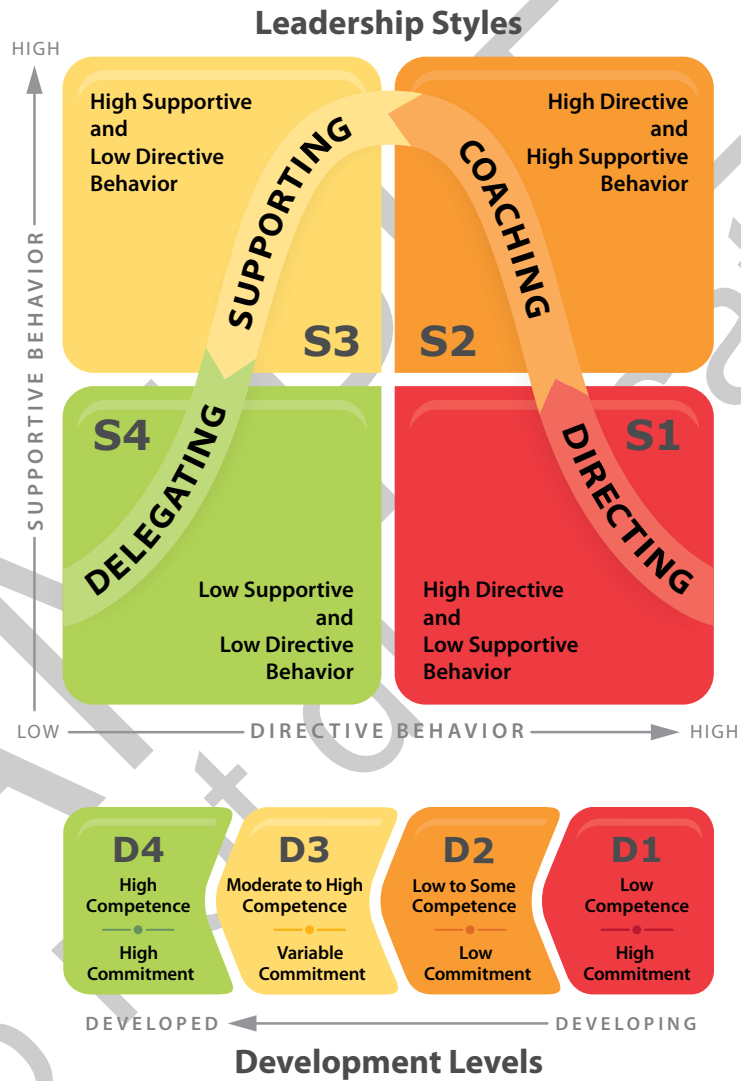
Individuals can start out at D2 if they have low competence and lack commitment.

<b>D2</b> Low to Some Competence Low Commitment	<b>D1</b> Low Competence High Commitment
<p><b>Competence</b></p> <ul style="list-style-type: none"> <li>■ Has some knowledge and skills; learning; not competent yet</li> <li>■ Doesn't know how to move forward</li> <li>■ Inconsistent performance and progress</li> </ul> <p><b>Commitment</b></p> <ul style="list-style-type: none"> <li>■ Discouraged and frustrated; may be ready to quit</li> <li>■ Overwhelmed; demotivated</li> <li>■ Confused and concerned; afraid of making mistakes</li> </ul>	<p><b>Competence</b></p> <ul style="list-style-type: none"> <li>■ New to the goal or task</li> <li>■ Inexperienced</li> <li>■ Don't know what they don't know</li> </ul> <p><b>Commitment</b></p> <ul style="list-style-type: none"> <li>■ Eager to learn; curious; willing to take direction</li> <li>■ Enthusiastic; excited</li> <li>■ Confident about transferable skills and confident learning won't be difficult</li> </ul>
<p>Disillusioned Learner</p>	<p>Enthusiastic Beginner</p>

**Is learning; doesn't know how**



# Situational Leadership® II Model



**There is no best leadership style**

**The right style is a MATCH**

# Get Agreement Statements

**D1**

"Since you haven't done this before, would it be helpful if I provided you with some direction, resources, and information?"

**S1**

**D2**

"Since you're still learning, and may be discouraged, would it be helpful if I continue to provide you with some direction? And I'd also like to hear your ideas."

**S2**

**D3**

"Since you know how to do this, what you need me to do is listen, rather than give advice, right?"

**S3**

**D4**

"I know you're taking the lead, but I'm here, when and if you need me."

**S4**

# Revisiting the SLII Fitness Test

<b>1 = Almost Never</b> less than 10% of the time	<b>2 = Infrequently</b> less than 25% of the time	<b>3 = Occasionally</b> less than 50% of the time	<b>4 = Sometimes</b> more than 50% of the time	<b>5 = Almost Always</b> more than 75% of the time	<b>6 = Always</b> more than 90% of the time
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## Rate yourself on Matching.

1    2    3    4    5    6

*My team members would say that ...*

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14. At times, I don't provide enough support.   

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15. I meet regularly with them so that they can ask for the direction and support they need.   

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16. I consistently have high-quality conversations with them.   

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17. They trust me.   

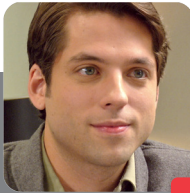
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18. I invite feedback about how I could be more effective as a leader.   

## Which competencies will I focus on?

- |                             |                             |                             |
|-----------------------------|-----------------------------|-----------------------------|
| <input type="checkbox"/> 7  | <input type="checkbox"/> 11 | <input type="checkbox"/> 15 |
| <input type="checkbox"/> 8  | <input type="checkbox"/> 12 | <input type="checkbox"/> 16 |
| <input type="checkbox"/> 9  | <input type="checkbox"/> 13 | <input type="checkbox"/> 17 |
| <input type="checkbox"/> 10 | <input type="checkbox"/> 14 | <input type="checkbox"/> 18 |

# Leadership Style 1 Demonstration



Ryan

**D1**

**Ryan's Goal:** To design a cooling system for the Seattle project by May that will achieve 80% water reclamation



Drew

**S1**

## Directive Behaviors

- Setting SMART goals
- Showing and telling how
- Establishing timelines
- Identifying priorities
- Clarifying roles
- Developing action plans
- Monitoring performance

## Supportive Behaviors

- Listening
- Facilitating self-reliant problem solving
- Asking for input
- Providing rationale; explaining why
- Acknowledging and encouraging
- Sharing information about the organization
- Sharing information about self

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# Leadership Style 1 Checklist



Check  
if Done

- Meeting purpose clarified?
- Transferable skills and enthusiasm acknowledged?
- Goal set by the leader?
- Agreement to provide direction (Style 1) reached?
- Timeline and checkpoints set?
- Priorities clarified?
- Roles defined?
- Boundaries defined?
- Action/learning plan defined? By whom? \_\_\_\_\_
- Direction given?
- Resources and information provided?
- Feedback (on how) provided?
- Leader checked for understanding and alignment?
- Follow-up meetings set up?
- Who made most of the decisions and did most of the talking? \_\_\_\_\_
- How could the leader improve his use of Style 1?

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# S1 SLII Conversation Starters

	Leadership Behaviors	What to Say
CONNECT	Clarify purpose of meeting	What I'd like to talk to you about is ....
	Acknowledge transferable skills	Your skills of ... will be really helpful.
	Acknowledge enthusiasm and initiative	I appreciate your (share what is appreciated, e.g., enthusiasm, initiative, willingness to ...).
ALIGN	Define SMART goals	What I'd like you to do is (list outcomes) ... by (add date). What a good job looks like is ....
	Get Style 1 agreement (development level and leadership style)	Since you haven't done this before, would it be helpful if I provided you with some direction, resources, information ...?
	Clarify performance tracking	We'll track your progress by ....
	Set priorities	The priority of this goal/task/project is ....
	Clarify roles	What you need to do is ... And here's what I'll do to help you ....
	Define boundaries	You can go this far, but then you'll need to check in with me ....
	Develop a plan to learn	To learn how to do this, first you need to .... Then, you should (specify next steps) .... Together, we should (clarify mutual actions) ....
TEACH	Teach/show; provide direction and examples	Let me show you how to do this. Here's an example .... Be careful not to (share tips, cautions).
	Provide information/resources/solutions	Here's some information that will be helpful .... If you need help, you can contact (share name) .... Here's how I'd solve that (share advice).
	Direct problem solving	Here's what I'd like you to do to solve this problem (name problem and give direction).
	Provide opportunities to practice new skills	Try this a few times before we get together (set up practice).
	Provide feedback on how	Here's what I've observed .... Here's what I've heard ....
RECONNECT	Check for understanding and alignment	So, why don't you recap/tell me what you've heard so I can make sure I've given you the direction you need to be successful.
	Follow through	Let's set up our next meeting (set meeting date and time).

# One on One Worksheet

Name \_\_\_\_\_

Meeting With \_\_\_\_\_

Meeting Date \_\_\_\_\_

## Directions

1. Make a list of topics you need to discuss. You can talk about whatever is on your mind.
2. Diagnose your development level for topics that are goals or tasks.
3. Decide what response you need from your leader or colleague—S1, S2, S3, or S4—for each topic.
4. Email this completed worksheet to your leader or colleague 24 hours before the meeting.

Topics	Development Level (if relevant)	Leadership Style Response You Need	Next Steps
<b>1</b> _____ _____ _____ _____ _____	D	<input type="checkbox"/> <b>S1</b> Direction • Solutions • Information <input type="checkbox"/> <b>S2</b> Coaching • Advice • Feedback <input type="checkbox"/> <b>S3</b> Good Questions • Listening • Encouragement <input type="checkbox"/> <b>S4</b> Acknowledgment • Autonomy • Influence	_____ _____ _____ _____ _____
<b>2</b> _____ _____ _____ _____ _____	D	<input type="checkbox"/> <b>S1</b> Direction • Solutions • Information <input type="checkbox"/> <b>S2</b> Coaching • Advice • Feedback <input type="checkbox"/> <b>S3</b> Good Questions • Listening • Encouragement <input type="checkbox"/> <b>S4</b> Acknowledgment • Autonomy • Influence	_____ _____ _____ _____ _____
<b>3</b> _____ _____ _____ _____ _____	D	<input type="checkbox"/> <b>S1</b> Direction • Solutions • Information <input type="checkbox"/> <b>S2</b> Coaching • Advice • Feedback <input type="checkbox"/> <b>S3</b> Good Questions • Listening • Encouragement <input type="checkbox"/> <b>S4</b> Acknowledgment • Autonomy • Influence	_____ _____ _____ _____ _____
Use the SLII® Worksheet to diagnose your development level, if relevant.		Use the One on One Conversation Starters to ask for the leadership style you need.	Next Meeting Date _____

# D1 One on One Conversation Starters

Match Me with **S1**

	D1 Needs	What to Say to Get an S1 Match
CONNECT	Purpose of the meeting clarified	What I'd like to talk to you about is (add topics).
	Transferable skills acknowledged	I'll be able to use my skills of ... (list skills) to accomplish this goal ....
	Enthusiasm and initiative acknowledged	I'm really excited to get started on ....
ALIGN	SMART goals	I would benefit from knowing exactly what my goal is. What does a good job look like? What is a reasonable time frame for completing this goal?
	Style 1 agreement (development level and leadership style)	I want to remind you that I have never done this exact goal before and will need direction in order to be successful. Do you agree?
	Knowledge of how performance will be tracked	How will we stay in touch on this goal or task? Will you or will someone else review my performance? When would you like an update?
	Priorities	What is the priority of this goal or task?
	Role clarity	Can we take a minute to get really clear on each of our roles? What am I specifically responsible for?
	Boundaries	Which decisions can I make on my own? When should I check in with you?
	Learning plan	Who can teach me how to do this? What should I study, read, or review? Can you tell me what you think I should do first, and then what the next steps are? What should I have done, when?
	Direction on how; examples	What direction or advice do you have for me? Do you have examples? What should I be careful of?
LEARN	Access to information/resources	What information do you have that will be helpful to me? Who might be a good role model, mentor, or teacher?
	Solutions to problems	What are my next steps?
	Opportunities to practice	What should I work on now? What should I try to do before we get together again?
	Feedback	How am I doing? What should I be doing differently?
	RECONNECT	Check for understanding and alignment
Follow through		When will we meet again?