

GAINING A.C.C.E.S.S. TO LEAD OTHERS

My Activities Workbook

14

ACTIVITIES **C**RITICAL TO **C**ONTINUOUS
EVOOLUTION & **S**UCCESS FOR **S**ELF

Let chemistry, confidence, and communication increase your effectiveness when leading others and being led.

PART OF THE LEAP SERIES BY
DR. ELIZABETH A. CARTER

Gaining A.C.C.E.S.S.

to Lead Others

**14 Activities Critical to Continuous
Evolution & Success for Self**

My Activities Workbook

Let chemistry, confidence, and communication increase your effectiveness when leading others and being led.

Dr. Elizabeth A. Carter



© 2020 Dr. Elizabeth A. Carter

INTRODUCTION

WRITING WORDS WORKS WONDERS

I can't tell you where I'd be if I hadn't had a pen on hand to write down my ideas.

—Richard Branson

GAINING A.C.C.E.S.S. TO LEAD OTHERS ACTIVITY WORKBOOK

Step into the challenge. We cannot control what other people do, think, say, or feel. It is our role to be prepared to handle whatever situation is placed in front of us. Let chemistry, confidence, and communication increase your effectiveness when leading others and being led.

The purpose of the workbook is to allow you to record the answers to the reflection questions, and to formulate your action plans.

The layout of the pages corresponds to the sections in the book.

Section 1: CHEMISTRY

MAKING IMPRESSIONS

LEAVING IMPRESSIONS

Section 2: CONFIDENCE

IMPROVING SELF AND OTHERS

OVERCOMING INEVITABLE OBSTACLES

Section 3: COMMUNICATION

LEADING OTHERS

WORKING WITH OTHERS

I find that writing things down and constantly reviewing my words helps them come to life. It is also easier to not have to remember an idea if it is on paper. I encourage you to do the same. There are no right or wrong responses, just let your mind flow and write down everything. Even if you stray from the original question, keep writing, those thoughts may be the answer to a future or lingering question. Quite often for me, weeks later an idea will resonate, and I know I had already written something down in my notebook. Carry this workbook with you, and your ideas will come to life...

Enjoy!

Section 1: CHEMISTRY

Your value does not decrease based on someone's inability to see your worth.

—Zig Ziglar

When viewing a tombstone, we are taught that it is not the beginning date or the end date that matters but how one lived in the “–”. Over the course of our lives, we have many dashes by way of people we meet. Quite often, we do not remember anything except for the first time we met each other and the legacy left when our relationship ended. At work, we are taught to be cordial to each other, but sometimes, that emotion seems forced. I have had people try to become my friend because it was the right thing to do. Being an introvert, I only allow people whom I trust and who feel genuine to me into my circle. I have had managers, coworkers, and other employees who wanted to have coffee once a month, would come by desk unnecessarily to see how I was doing, or would invite me to their home for events. Those whom I had an immediate connection with earned their way into my circle, and they are lifelong friends whom I cherish. The invitations that I felt had some alternative motive got a polite, “Sorry, I already have plans. Maybe next time.”

Those personal first impressions become clues when you are exploring new opportunities. Whether it be a new job, city, or career, there are some subliminal clues that we may dismiss, but hindsight is always 20/20. How we handle those clues is crucial, and how we leave a last impression is more important and memorable.

MAKING IMPRESSIONS

Be yourself. Everyone else is already taken.

—Oscar Wilde

Lessons Learned and Activities shared in this sub-section:

First Flush Final: Activity 1: Analyze the interaction and determine to hold or fold

Tone Tells Truth?: Activity 2: Check your tone and whom you are talking to

Reflection Items

- 1) Think about the people you have worked with. What drew you to them? What drove you away from them?

- 2) Who were your favorite bosses? What qualities did they exhibit that were important to you? Did you click right away, or did it take some time for you to warm up to each other?

- 3) Are you a calmer or a screamer? Why?

LEAVING IMPRESSIONS

It is not what we get but who we become, what we contribute . . . that gives meaning to our lives.

—Tony Robbins

Lessons Learned and Activities shared in this sub-section:

Lay Legacy Leaves: Activity 3: Leave behind impactful reports and process improvements

Minutes Makes Memories: Activity 4: Leave behind impactful words

Reflection Items

1) What types of legacies have you left in the past? Were they good or bad?

2) What are you working on right now? What problems are you solving?

3) Most problems exist because solving them takes a lot of time and effort. Is there something you can raise your hand to assist with that will solve a problem and leave your mark?

Section 2: CONFIDENCE

Human behavior flows from three main sources: desire, emotion, and knowledge.

—Plato

Plato's three sources of human behavior are what makes working with others exhilarating or frustrating. Everyone's behavior is different because of the confidence balancing these three sources. And these sources are sometimes not dependent on each other. I have met many people that had a ton of knowledge but no desire to share it. Others had the emotional connection, but it was an uphill battle for them to obtain knowledge. We must recognize our areas of strength that brings confidence and leverage that strength to gain insight and knowledge from others. That interaction can be great or difficult, some of which may be a product of the chemistry I described in the previous section. The only way we will improve ourselves and our confidence is by our interactions and recognizing that obstacles are inevitable.

IMPROVING SELF AND OTHERS

*You cannot hope to build a better world without improving the individuals.
To that end, each of us must work for our own improvement.*

—Marie Curie

Lessons Learned and Activities shared in this sub-section:

Question, Question, Question: Activity 5: Seek to understand

Activity 6: Have data and know your numbers

Always Adjust Attitude: Activity 7: Join journey joyously

Reflection Items

- 1) How would you rate your confidence in your current role? Who are your go-to resources for questions?

- 2) Who are resources you avoid? What knowledge do they have that you need? How can you engage with them in a way that makes it a win-win for both of you?

- 3) What is your mood when you wake up? Is it a reaction to your calendar of events that day? How can you look at those challenging interactions as ones of education and development?

OVERCOMING INEVITABLE OBSTACLES

*Always remember, you have within you the strength, the patience,
and the passion to reach for the stars to change the world.*

—Harriet Tubman

Lessons Learned and Activities shared in this sub-section:

Don't Dwell Disappointment: Activity 8: Get over it quickly

Opinions Occasionally Opposite

No Not Never: Activity 9: Keep the faith

Reflection Items

1) Think about your last disappointment. How did you recover and how long did it take?

2) What did you learn from that event? Did it give you strength or did you succumb to defeat?

3) Every person has a hot spot. A hot spot is a topic that will get someone on his or her soapbox because there is a strong passion for it. When you are presenting a recommendation, are you appealing to that person's hot spot to have a better chance of approval?

Section 3:

COMMUNICATION

Wise men speak because they have something to say, fools because they have to say something.

—Plato

My family gave me a lot a lot of guidance over the years. The most impactful guidance about communication included children should be seen and not heard; if you have nothing nice to say, don't say anything; think before you speak; and don't speak just to hear your own voice. I have carried this guidance with me, which may have contributed to my introverted nature but has proven beneficial because when I speak, people listen as I have something of value to share. Communication is a learned skill. The more it is practiced, the more natural it becomes. We are a world of emails and emojis, which can be misinterpreted. Whether you are managing from the top, middle, or up, I share with you in this section how you can more effectively get your message across.

LEADING OTHERS

A man who wants to lead the orchestra must turn his back on the crowd.

—Max Lucado

Lessons Learned and Activities shared in this sub-section:

Cascade Clear Connections

Transparency Triggers Teamwork: Activity 10: Commit to meetings

Engagement Enables Elevation: Activity 11: Overcome brain boredom with stretch assignments

Reflection Items

- 1) Do you know how your responsibilities forward the mission and vision of your organization? How well have you transitioned that to the daily activities of your team?

- 2) What is your communication cadence? What is your cancellation ratio? Do you think your team has all the information they need (at the right time) to be successful?

- 3) Do you know the visible and hidden talents of your employees? Have you had a conversation about their other interests? Are those other interests appropriate for them to lead a project on the team or at a higher level?

WORKING WITH OTHERS

Alone, we can do so little; together, we can do so much.

—Helen Keller

Lessons Learned and Activities shared in this sub-section:

Influence Important Ingredient: Activity 12: Sometimes you must DUMB it down

Hierarchy Helps/Hurts: Activity 13: Know when to push the panic button

Volunteers Value Vision: Activity 14: Determine their why

Reflection Items

- 1) Do you know the preferred level of detail your leaders like? Do you know which metrics are valuable to them?

- 2) Think about the last time you presented a proposal or recommendation to influence an audience. What was the outcome? What would you do differently next time?

- 3) What does your organization chart look like? Are there many solid and dotted lines? Who is your go-to person to assist with smaller complex issues?

About the Author

Dr. Elizabeth A. Carter is an insurance professional, performance improvement leader, speaker, and best-selling author. With over 25 years working in corporate settings in a financial discipline, Dr. Carter has a unique passion for financial acumen and knowledge empowerment that has provided her the opportunity to lead, mentor, and develop others in the areas of strategy and financial analysis, performance improvement, and talent development for profit and nonprofit organizations.

She is the CEO of AAPPEAL, LLC, a company branded on her four passions of leadership, engagement, analytics, and performance. She offers training programs, facilitated sessions, keynote presentations, and one-on-one coaching to help individuals and companies close the gaps between their current performance and desired performance. Visit her website at www.eac-appeal.com.

Dr. Carter holds a PhD in education specializing in training and performance improvement from Capella University. She holds an MS in education in the same specialization from Capella University and an MBA in management from the New York Institute of Technology. She earned a BBA in marketing from Hofstra University. Further, she holds the Chartered Property Casualty Underwriter designation and is a Distinguished Toastmaster.

Facebook: <https://facebook.com/eacaappeal/>

Instagram: <https://www.instagram.com/eacaappeal/>

Twitter: <https://twitter.com/@eacaappeal/>

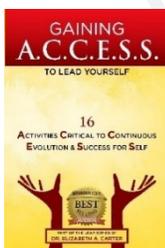
LinkedIn: <https://www.linkedin.com/in/elizabethcartercpcu/>

About the LEAP Series

The LEAP Series is a source of books and online and facilitated training to help individuals and organizations grow their career and business. The key topics of the series pertain to leadership, engagement, analytics, and performance.

The LEAP Series is a component of the company AAPPEAL, LLC, which is focused on closing the gaps to make you more “appealing” to your company and grow your career.

Other books in the LEAP Series



Gaining A.C.C.E.S.S. to Lead Yourself: 16 Activities Critical to Continuous Evolution & Success for Self (LEAP Series Book 1)

Gain tips and tools learning from Dr. Carter’s bumps, bruises, and braveries to elevate your life.

Paperback, ebook and workbook available on Amazon

AAPPEAL, LLC

