

Worksheet 3.1 Are You a Self-directed Learner?

Instructions: Place a check mark in the column that you think is the right assessment of your agreement to the statements on the left. Be as realistic and accurate as possible. Remember, no one needs to see this but you.

	<i>Strongly Agree</i>	<i>Agree</i>	<i>Not Sure</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
I am curious.					
If I don't know something, I look it up.					
I am goal-directed.					
I understand that learning takes discipline.					
I want to develop my skills and behaviors.					
I know I can develop a plan for learning.					
I am reasonably self-aware of my skills and abilities.					
I challenge myself to find learning opportunities in a variety of ways.					
I am open to learning from others – with or without their help.					
I am comfortable asking others for feedback/input.					
I see problems as challenges rather than as obstacles.					
I am self-motivated.					

Worksheet 3.1 (Cont.)

	<i>Strongly Agree</i>	<i>Agree</i>	<i>Not Sure</i>	<i>Disagree</i>	<i>Strongly Disagree</i>
I can see learning opportunities just about anywhere.					
I think being prepared to learn is essential.					
I believe in practicing to get better at something.					
I know I can learn from others.					
If I create a plan, I stick to it.					
I think I can learn through observation.					
I believe that asking the right questions is essential for learning.					
I think taking notes and writing things down helps me to learn.					
I organize my time well.					
I like to learn.					
I prefer to develop a plan to guide my learning.					
I like looking for information.					

Interpretation: There is no score to this self-assessment. For the items that you marked Disagree or Strongly Disagree, try to understand why this is the case. Prepare bullet points for each to analyze your reluctance to engage in the learning behavior listed. The fewer things with which you disagree, the more open you are likely to be to learning on your own.

Worksheet 4.1 Self-assessment: Management Competencies – Proficiency

Proficiency level: Rate your proficiency level for each competency using the following scale.

- 5 – Highly proficient; considered by others as an expert
- 4 – Proficient; advanced skill
- 3 – Not much exposure/practice
- 2 – Somewhat proficient; basic skill level
- 1 – Not at all proficient; low level of skill

	5	4	3	2	1
Accountability:					
Adaptability:					
Analytical thinking:					
Building relationships:					
Building teams:					
Business acumen:					
Change management:					
Coaching:					
Collaboration:					
Communication:					
Conflict management:					
Continuous learning:					
Creativity:					
Customer orientation:					
Decision making:					
Delegating:					
Developing others:					
Diligence:					
Empowering others:					
Ethics:					
Finance and budgeting:					
Global mindset:					
Goal setting:					

Worksheet 4.1 (Cont.)

	5	4	3	2	1
Human capital management:					
Influencing others:					
Initiative:					
Innovation:					
Interpersonal skills:					
Leadership:					
Listening:					
Managing performance:					
Motivating:					
Negotiation skills:					
Networking:					
Organization:					
Organization awareness:					
Performance management:					
Planning:					
Presentation skills:					
Problem-solving:					
Project management:					
Results orientation:					
Risk-taking:					
Seeking/giving feedback:					
Strategic thinking:					
Stress management:					
Teamwork:					
Trust and respect:					
Valuing diversity:					
Work-life balance:					

Worksheet 4.2 Self-assessment: Management Competencies – Importance

Importance: Rate the importance for each competency now and in 12 months from now using the following scale. Place a number in each box, in each of the two columns. Importance scale:

- 5 – Highly important
- 4 – Important
- 3 – Not sure
- 2 – Somewhat important
- 1 – Not at all important

	<i>Now</i>	<i>In 12 Months</i>
Accountability:		
Adaptability:		
Analytical thinking:		
Building relationships:		
Building teams:		
Business acumen:		
Change management:		
Coaching:		
Collaboration:		
Communication:		
Conflict management:		
Continuous learning:		
Creativity:		
Customer orientation:		
Decision making:		
Delegating:		
Developing others:		
Diligence:		
Empowering others:		
Ethics:		
Finance and budgeting:		
Global mindset:		
Goal setting:		

Worksheet 4.2 (Cont.)

	<i>Now</i>	<i>In 12 Months</i>
Human capital management:		
Influencing others:		
Initiative:		
Innovation:		
Interpersonal skills:		
Leadership:		
Listening:		
Managing performance:		
Motivating:		
Negotiation skills:		
Networking:		
Organization:		
Organization awareness:		
Perceptivity:		
Performance management:		
Planning:		
Presentation skills:		
Problem-solving:		
Results orientation:		
Risk-taking:		
Seeking/giving feedback:		
Strategic thinking:		
Stress management:		
Teamwork:		
Trust and respect:		
Valuing diversity:		
Work-life balance:		

Worksheet 4.3 Proficiency Development Plan

	<i>1st Priority</i>	<i>2nd Priority</i>	<i>3rd Priority</i>	<i>4th Priority</i>
Competency				
Objective				
Time Frame				
Resources Needed				
Resources Available				
Self-directed Approaches				

Instructions: Use more than one worksheet if necessary. Another option is to create a single worksheet for each competency so that you have additional room for notes.



Worksheet 5.1 Networking Plan

Competency:		Date:
Objective:		
Brainstorming: relevant events, potential people, questions, and resources		
Relevant sources for networking: 1. 2. 3. 4. 5.	Relevant people for networking: 1. 2. 3. 4. 5.	
Questions to ask during networking: 1. 2. 3.	Resources to seek during networking: 1. 2. 3.	
Plan: strategy for events and people to engage and in what order; build 8 to 12-week plan		
Who, if anyone, to inform or consult about plan:		
Budget or financial considerations:		
Week one:	Week two:	
Week three:	Week four:	
Week five:	Week six:	
Week seven:	Week eight:	

Worksheet 5.2 Networking Meeting Preparation

Competency:		Date:
Objective: <i>write a statement about the competency you wish to develop. Be as specific as possible.</i>		
Who: <i>list the person with whom you will network</i>	When: <i>date of the networking meeting/ event</i>	
Referral: <i>who, if anyone, helped with this connection</i>	Questions: <i>plan when you will prepare your questions for the meeting</i>	
Context/where: <i>identify the context; professional gathering? One-on-one? Lunch? Others present? In-person or virtual? Time zone difference?</i>		
What: <i>what are the questions you will ask; what resources or other connections will you seek?</i>		
Advance planning: <i>what do you need to read and how do you need to prepare so that your session will be as effective as possible?</i>		
Follow-up: <i>Can you suggest anyone? May I use your name? Are there any resources you'd suggest? Would you mind making an introduction?</i>		

Worksheet 6.1 Role Playing on Your Own

Instructions:

- Find a quiet spot where you will be comfortable practicing a role play
- Get into character for one of the scenarios below
- Prepare some notes around what you want to accomplish
- Practice the role play scenario multiple times and adjust the conversation until you are comfortable with the interaction

Common scenarios:

1. A phone call where you are asked to go to a meeting in 45 minutes that's not on your schedule and for which you don't have time
2. A poor performer
3. A timid subordinate assigning a task
4. Talking to your boss's boss
5. Talking to a high performer about a task
6. Unengaged employee
7. You go to the copy machine and it's out of paper (again) or it's jammed (again); talking to a peer, your staff associate, or anyone who will listen
8. You witness a peer call out his or her subordinate in a negative way and in front of others
9. You're talking to a peer about an upcoming meeting where there may be conflict
10. You're asked to defend your budget proposal unexpectedly

Create your own scenarios:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Worksheet 6.2 Role Play Planner

Competency/situation/skill to practice:		Date:
Objective:		
Date, time, and location of role play:		
Describe role play scenario:		
Partners, if any; roles for each partner:		
Preparation needed:		
Materials, if any, needed:		
Observers:	Facilitator:	
Organizational factors to consider:	Personal factors to consider:	

Worksheet 7.1 Building a Plan for Questioning

	<i>Learn</i>	<i>Confirm</i>
<ul style="list-style-type: none"> • Experts/SME 		
<ul style="list-style-type: none"> • Coworkers • Peers inside/outside organization 		
<ul style="list-style-type: none"> • Bosses current and former • Senior managers and executives 		
<ul style="list-style-type: none"> • People you meet through others • People you meet networking 		

Worksheet 7.2 Question Development

Competency:	Date:
<p>General Questions: Think about the broad questions you have and the resources you need.</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 	
<p>Focused Questions: Write down more specific questions about the competency and think about including a request for names of people who can assist.</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 	
<p>Targeted Questions: Construct deep and more complex questions to ask SMEs; you may assign some questions to specific individuals or you may ask the same question of multiple people.</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 6. 	

Instructions: Use as many worksheets as necessary to capture your questions. You may also want to note if the questions are designed for a particular audience or type of individual to ensure that you have enough variety in who you interview.



Worksheet 8.1 Observation Template

Date:	Competency:
Description of observation / event:	
Planned observation or <i>ad hoc</i> occurrence:	
What are 3 or more specific things you noticed related to your competency target?	1. 2. 3.
What reflections do you have about what you've observed?	
How will you internalize what you observed?	What will you do (or try) now: What will you stop doing: Who will you follow up with:
Is there anything else unique or remarkable to note about the observation?	

Worksheet 8.2 Observation Schedule

	Competencies you've identified as a priority: <i>Use two sheets if necessary</i>			
	1.	2.	3.	4.
	List competency:	List competency:	List competency:	List competency:
What to observe:				
Who to observe:				
When to observe:				
Where to observe:				
Why will this help:				
Opportunities for observation:				
Notes on completion:				
Notes on practice:				



Worksheet 9.1 Getting into the Swing of Journaling

Instructions: This exercise can be repeated multiple times and you can add your own observations or additional questions.

Prompt 1: *Think about the last meeting you attended, was there anything that either frustrated you or excited you? Write down what it was and why you felt the way you did.*

Prompt 2: *Think about the next meeting you are scheduled to attend, are you looking forward to it or are you dreading it? Write down what you look forward to or dread and why you feel the way you do.*

Prompt 3: *Think about your best friend at work (i.e., the person you spend the most time with or whose company you enjoy the most). What is their best professional quality and what is their best personal quality? If you had to give this person feedback on something to improve, what would it be and why?*

Prompt 4: *Think about your own behavior at work, what is one thing that you think you need to work on and improve? What would your boss say about this behavior? What would a subordinate or colleague say about this behavior?*

Worksheet 9.2 Partners Journal

Instructions: Select an event and/or a person and competency; partner with a colleague who is interested in the same competency. Define the time frame and parameters (could be a meeting, a day, or something else) and at the end of the exercise discuss your reflections and observations with your partner.

Competency:	Partner:	Date:
<i>Describe the focus in more detail – what is the objective?</i>		
<i>How long will the journal period last?</i>		
<i>What are the parameters (e.g., internal vs. external focus; managers vs. individual contributors, discussion at end or share journal entries; specific meeting, etc.)?</i>		
Observation:	Observation:	
Observation:	Observation:	
Observation:	Observation:	
Observation:	Observation:	
<p>Debrief and discussion:</p> <ul style="list-style-type: none"> • <i>Did you see/hear the same thing?</i> • <i>Was your interpretation the same?</i> • <i>Were you accurate about yourself/others?</i> • <i>Are outcomes what you expected?</i> • <i>What was your focus compared to partner?</i> • <i>What observations were unique to each?</i> • <i>Did you repeat the same examples?</i> • <i>Other questions:</i> 	Notes:	

Option: Rather than seeking a partner in advance, after an event, or during a one-on-one conversation with someone you trust, explore their observations, share some of your own, and discuss the reflection and learnings from others.



Worksheet 10.1 Learning Moments

Describe the learning moment:	
Where: (learning moment occurred)	Date:
Circumstance: (was it a meeting, event, chance encounter)	
Context: (who was present or observing)	
Your role: (participant, observer, target, etc.)	
What you learned:	
Behavioral learning:	
Technical learning:	
New idea:	
Follow-up	
Next steps for reinforcing learning:	
Seek out someone from learning moment? Who:	
Questions you have:	
What else might you learn:	

Instructions: Learning can occur anytime, anywhere. Identifying that learning can help to solidify a new behavior or idea for future use. It can be as simple as a phrase or approach to something more complex such as an effective way to stop a conflict or a method for analytical thinking.

Worksheet 10.2 Problem or Challenge

Describe the problem or challenge:
Circumstance and context: (be as detailed as possible about the issue and the people involved)
Your role: (as a manager, peer, coworker, client, vendor, etc.)
What you need to be able to do to deal with challenge:
Behavioral performance:
Technical performance:
Outcome you seek:
How to approach
Steps to take:
Who to engage:
How to practice:
Concerns you have:
What self-directed learning tools can be useful to prepare:
Follow-up: What happened