



PERSONAL LEARNING CONTRACT

Participant

Name

Position

Phone #

Fax

E-mail

1. This Executive CoachWorks (ECW) Personal Learning Contract is designed to help you continue to succeed and improve your management leadership skills. **It is a contract with you and your supervisor to plan and guide your own development as an executive manager.**
2. Review the format and possible content of this contract with yourself and others whose input you value as part of your pre-work for coaching. The more work you do on this rough draft of the Personal Learning Contract prior to the coaching sessions, the better.
3. You will produce a final draft of this contract with the help of the coaching staff during the coaching session itself.
4. We will ask you to share this contract with your supervisor(s)
5. Should you have questions about this pre-work or about us please visit www.dric.com or call your coach directly at 651-415-1400.

ECW PAST LEADERSHIP SITUATIONS LIST

Explanation: A very good predictor of how you'll do something in the future is how you did it in the past in similar situations. An exception to this is when you consciously review the way you prefer doing something and mindfully set out to do that thing differently. Actively thinking about past situations where you exercised leadership, and defining for yourself what you did, how it turned out and what you learned all contribute to your being able to consciously and purposefully employ more effective leadership skills in future situations. You will use this information in the seminar.

Instructions: Review the attached list of sample situations. Use the chart below and list at least 5 work or non-work situations in your life in which you exercised leadership. Use the back of this page if you need more room to write.

Situation	What you did (Specific Behavior)	Outcome (Positive/Negative)	What you learned

ECW REAL-WORLD CURRENT LEADERSHIP SITUATIONS LIST

Explanation: The Executive CoachWorks will give you the opportunity to learn new skills and behaviors while addressing real leadership situations and challenges you now face. With the help of DRI Consulting training staff, you will have opportunities to work on the things you list. This will help you gain a better understanding of how to resolve some of your leadership challenges.

Instructions: Think of situations or issues you are involved in **now** as an executive that are unresolved and particularly challenging for you. Refer to your own calendar for the next few months. Using the chart below, list the situations or issues that you face that need to be resolved and completed. Use the back of this page if you need more room.

Situation	Issue	Outcome you desire	What you need to do	By when

EXECUTIVE LEADERSHIP DEVELOPMENT PLANNING: SUMMARY WORKSHEET

Instructions

A central premise of the Executive CoachWorks (ECW) is that it is learner driven, that you have both the authority and responsibility for making your own leadership learning and development happen. The company and your supervisor(s) are sponsors in your success. ECW Development Planning is a three-step process. You begin by (1) Analyzing your past and current Real World Leadership Situations (pp.2-3, 10). This gives you and us a practical, immediate, relevant context for your executive development. Second, (2) you do a comprehensive Self-Assessment of your professional life to date (pp. 4-5). Finally, (3) you produce a Development Plan to identify ways to reinforce your strengths and improve in areas of need (pp. 6-9). We call this entire document and the commitment to action a Personal Learning Contract, an implementation/project plan to help you act on the things you need to do. **This is written in light of specific, real and immediate leadership situations you face in your job.**

Leadership Self-Assessment

Instructions (1) Collect, as much as possible, the information defined below and spread it out on a large work surface.

- Your job description and organizational chart
- Any performance objectives you are currently responsible for
- The business plan or set of operating goals you are pursuing
- Your “ECW Past Leadership Situations List”
- Our “ECW Real-World Current Leadership Situations List”
- Past Performance Review Summaries (2 most recent)
- Summary of any personality or leadership testing you may have taken

(2) Review this information about you and your work and answer the questions that follow. Use the following page and the backside, if you need more room.

The major themes or patterns from the information above tell me the following things about my management and leadership skills:
(Note positive and negative events, how they occurred, similarities or differences across events, what others have said about you in past reviews or through work personality testing.)

EXECUTIVES LEADERSHIP DEVELOPMENT PLANNING: SUMMARY WORKSHEET (Continued)

The greatest challenges that I face in my job are:

The greatest strengths I have to draw on to meet these challenges are:

The greatest development needs I have as a leader are:

EXECUTIVES LEADERSHIP DEVELOPMENT PLAN

Instructions: Use the information you summarized on the preceding page and on page 3 to outline your leadership development plan. You will have the chance to review drafts of this with your trainer/coach.

Learning Objectives What leadership skills I want to learn or be able to use better	Current Leadership Situations What situations provide opportunities to practice the skills	Learning Tasks and Strategies What I am going to do to learn and practice these skills, and what resources I will use	Evaluation How I am going to show I learned them	Date Completion Date

Continued from previous page (if necessary)

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Analysis: Identify for yourself the greatest benefits from accomplishing the objectives in your Personal Learning Contract.

- 1.
- 2.
- 3.

Analysis: Identify any potential barriers to your success in implementing this Personal Learning Contract, their likelihood of occurring, and the degree of confidence you have to overcome them.

	Barrier	Likelihood of occurring	% Confidence you can overcome it (0-100%)
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

ECW Participant: I agree to meet the objectives outlined above. I understand that I can modify my Personal Learning Contract, as I need to, at any time.

Signed: _____ Date: _____

SAMPLE SITUATIONS REQUIRING LEADERSHIP

Both you and your coach need to be aware of and able to identify the naturally occurring events on the job that can be leveraged for the purpose of learning and development as a manager. Use the list below to help you fill out the ECW Past Leadership Situations List and the ECW Real-World Current Leadership Situations List.

Work situations where leadership can be exercised and where significant development for a manager could occur:

- The resolving of customer problems
- Meeting customers' new needs for kinds of services or ways services are delivered
- Regularly recurring meetings this person leads or participates in
- Special or significant events affecting the position or work group
- Annual planning or budgeting processes
- Recurring events like month-end financial closes, staff performance reviews, internal/external audits
- Participation on special task forces or committees
- The resolving of specific operational problems
- New business opportunities identified
- New implementation or installation of a system or process or procedure
- Promotion/new assignment opportunities
- Participation in an acquisition or divestiture
- Difficulty working with a direct report, colleague or boss
- Competitor innovation announced/implemented
- Technological breakthrough affecting information processing
- Up-sizing or down-sizing
- Re-engineering
- New supervisor
- Significant change in direction or goal setting
- Many others you might think of