
SITUATIONAL LEADERSHIP® II

Ken Blanchard
Patricia Zigarmi
Drea Zigarmi
Victoria Halsey



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 individual's with what they need

Alignment

Situational Leadership® It 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.

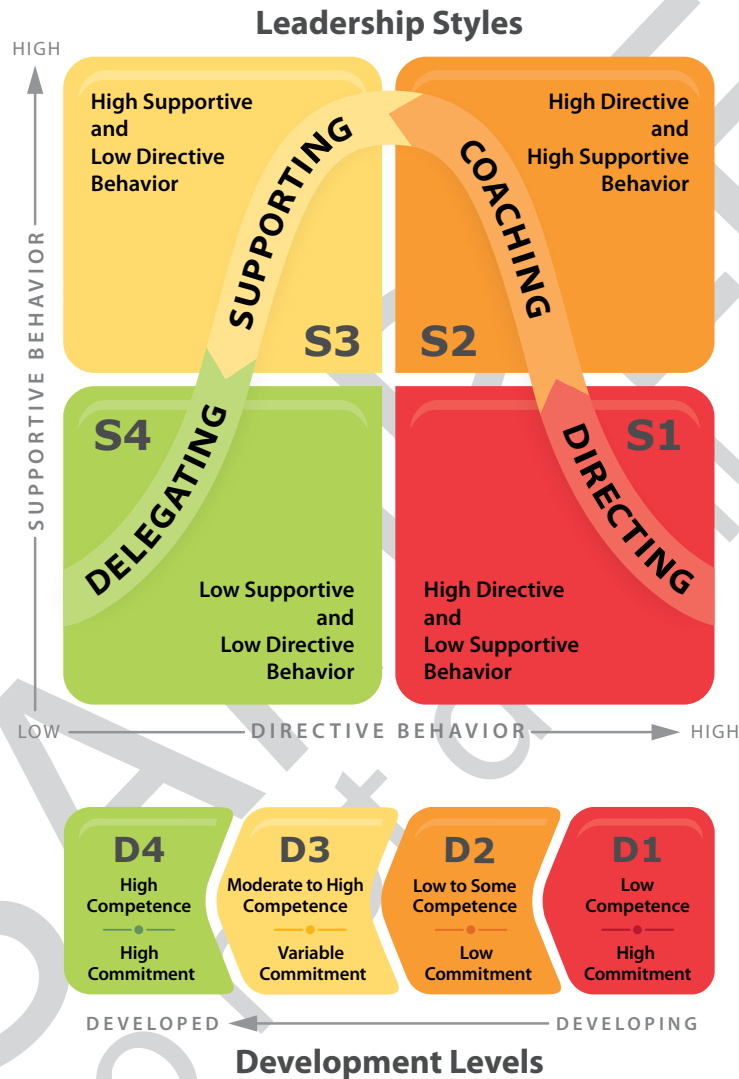
The four **Style Conversations** are used to develop competence and commitment.

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

Situational Leadership® II Model



**There is no best
Leadership Style**

**The best 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 (list feelings), would it be helpful if I continue to provide you with some direction. But I'd also like to hear your ideas. "

S2

D3

"So what you need me to do is listen, right? Would listening be more helpful than advice or direction? What is the best way for me to support you? "

S3

D4

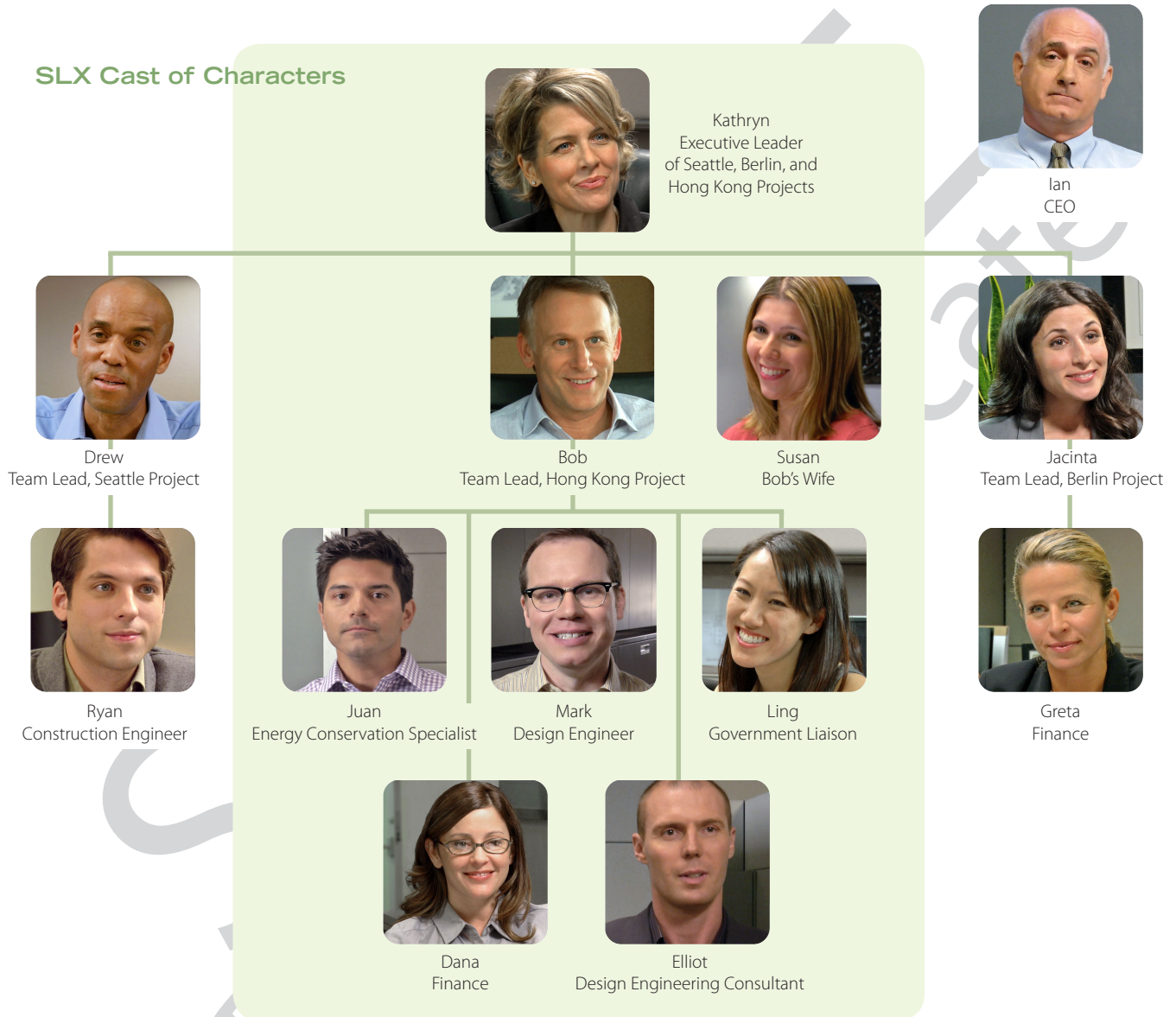
"I know you're taking the lead, but I'm here, when and if you need me."

S4

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 had 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

How competent is Mark on this goal?

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

Clues about Commitment (motivation and confidence)

How committed is Mark on this goal?

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

What does Mark need?



Jacinta

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

Goals 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, transfer those goals or key tasks to the section directly below.

Goals for		
Goal or Task #1	Goal or Task #2	Goal or Task #3

Updated SMART Goals		
Goal or Task #1	Goal or Task #2	Goal or Task #3
S What and when? T How measured?	S What and when? T How measured?	S What and when? T How measured?
<input type="checkbox"/> Relevant <input type="checkbox"/> Achievable <input type="checkbox"/> Motivating	<input type="checkbox"/> Relevant <input type="checkbox"/> Achievable <input type="checkbox"/> Motivating	<input type="checkbox"/> Relevant <input type="checkbox"/> Achievable <input type="checkbox"/> Motivating

Development Levels



Development Level Descriptors

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

**Has been successful;
knows how**

Development Level is goal or task specific!

Individuals can start out at D2 from the beginning if they have low competence, but lack commitment.

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

Has not been successful yet; doesn't know how

Revisiting the SLII Fitness Test

1 = Almost Never less than 10% of the time	2 = Infrequently less than 25% of the time	3 = Occasionally less than 50% of the time	4 = Sometimes more than 50% of the time	5 = Almost Always more than 75% of the time	6 = Always more than 90% of the time
--	--	--	---	---	--

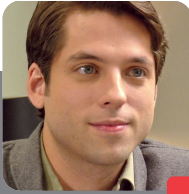
Rate yourself on matching.

	1	2	3	4	5	6
16. My team members would say that when they have demonstrated success on their own, I acknowledge them for their contributions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. My team members would say that I stay connected and give them appropriate feedback.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Some of my team members would say that, at times, I don't provide enough direction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Some of my team members would say that, at times, I don't provide enough support.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. My team members would say that I meet regularly with them so that they can ask for the direction and support they need.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Which competencies will I focus on?

<input type="checkbox"/> 9	<input type="checkbox"/> 13	<input type="checkbox"/> 17
<input type="checkbox"/> 10	<input type="checkbox"/> 14	<input type="checkbox"/> 18
<input type="checkbox"/> 11	<input type="checkbox"/> 15	<input type="checkbox"/> 19
<input type="checkbox"/> 12	<input type="checkbox"/> 16	<input type="checkbox"/> 20

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

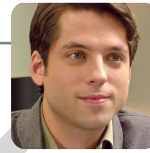
Directive Behavior

- ☐ Goal Setting
- ☐ Establishing timelines
- ☐ Identifying priorities
- ☐ Clarifying roles
- ☐ Action planning
- ☐ Showing and telling how
- ☐ Monitoring performance

Supportive Behavior

- ☐ 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

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?
- ☐ Plan for learning and practice defined? By whom? _____
- ☐ Direction given? _____
- ☐ Resources and information provided? _____
- ☐ Follow-up meetings set up? _____
- ☐ Leader checked for understanding and alignment? _____
- ☐ Feedback (on how) provided? _____
- ☐ Who made most of the decisions and did most of the talking? _____
- ☐ How could the leader improve his or her use of Style 1? _____



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 (DL and LS)	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
TEACH	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/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 want to talk about. You can talk about whatever is on your mind.
2. Diagnose your Development Level for topics that are goals or tasks.
3. Decide how you want your leader or colleague to respond—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 Want	Next Steps
1 <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	D _____	<input type="checkbox"/> S1 Direction • Solutions Information <input type="checkbox"/> S2 Coaching • Advice Feedback <input type="checkbox"/> S3 Good Questions Listening • Encouragement <input type="checkbox"/> S4 Acknowledgment Autonomy • Influence	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
2 <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	D _____	<input type="checkbox"/> S1 Direction • Solutions Information <input type="checkbox"/> S2 Coaching • Advice Feedback <input type="checkbox"/> S3 Good Questions Listening • Encouragement <input type="checkbox"/> S4 Acknowledgment Autonomy • Influence	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
3 <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	D _____	<input type="checkbox"/> S1 Direction • Solutions Information <input type="checkbox"/> S2 Coaching • Advice Feedback <input type="checkbox"/> S3 Good Questions Listening • Encouragement <input type="checkbox"/> S4 Acknowledgment Autonomy • Influence	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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 want.	Next Meeting Date

D1

One on One Conversation Starters

S1

Match Me with

	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 (DL and LS)	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?
LEARN	Direction on how; examples	What direction or advice do you have for me? Do you have examples? What should I be careful of?
	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	Let me recap the direction you've given me so I know we're aligned
	Follow through	When will we meet again?