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Summary

## The Next Level

### What Insiders Know About Executive Success

#### THE SUMMARY IN BRIEF

In *The Next Level*, former Fortune 500 HR executive Scott Eblin explains the difference between being a functional leader in an organization and being an executive. At the executive level, you must let go of many of the attributes that made you a successful functional leader and begin to think in terms of the organization as a whole.

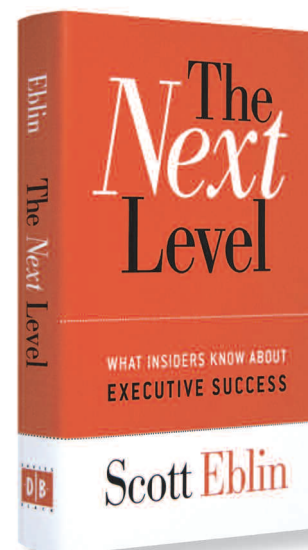
To be an effective executive, you need to know that what drove your progress at lower levels will not necessarily sustain your future success. You must adopt new ways of thinking and acting, and, more important, let go of old ways. Succeeding as an executive requires undergoing a transformational experience unlike any other in one's career. *The Next Level* provides the framework for achieving this transformation.

Eblin walks you through the pitfalls every new executive faces and provides the tools you will need to assure success in your new role. By learning the difference between accountability and responsibility, for example, you can put your energies in the right place.

Drawing on more than 20 years of experience working with new and seasoned executives, Eblin identifies nine key sets of behaviors and beliefs that rising executives must pick up and let go of to successfully transition to the executive level. If your goal is to make the most of the bigger footprint that is available to you as an executive, then *The Next Level* can help.

#### IN THIS SUMMARY, YOU WILL LEARN:

- Why insecure people make lousy leaders.
- How to make a Life GPS® (Goals Planning System).
- How to interact with your boss.
- How to learn what is important to senior executives.
- How to build teamwork.



by Scott Eblin

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# THE COMPLETE SUMMARY: THE NEXT LEVEL

by Scott Eblin

**The author:** Scott Eblin, a former Fortune 500 human resources executive, is an executive coach, speaker and author. He is president of The Eblin Group, whose clients include AOL, Capital One, Northrop Grumman, and The World Bank. Eblin is a graduate of Davidson College, Harvard University and Georgetown University's leadership coaching certificate program, where he is on the faculty.

*The Next Level* by Scott Eblin. Copyright © 2006 by Scott Eblin. Summarized by permission of the publisher, Nicholas Brealey, North America. 218 pages. \$26.95. ISBN 978-0-89106-193-9.

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## Pick Up Confidence in Your Presence

Let's start with a basic truth: Insecure people make lousy leaders. So, as you move into the executive level, the first challenge is to keep insecurity from getting the better of you. Unless you are superhuman, your first days as an executive will naturally produce some uncertainty and discomfort. It is critical for your success that you not dwell on thoughts and self-assessments that cause you to doubt your capacity to contribute as an executive. You must build a sense of *grounded confidence* in your presence and in the idea that you have important contributions to make as one of the leaders of your organization.

### From the Tactical to the Transformational

Regularly demonstrating your confidence in a grounded and appropriate way will build the confidence of your boss, your peers and your team in you. Building your confidence in your executive role can begin with some tactics that, when you make them part of your routine, can lead to transformational changes that dramatically raise your level of leadership effectiveness. The opportunity you have is to identify the key tactical behaviors that, if regularly repeated, will lead to a transformation in the level of confidence you project.

To achieve and sustain results over the long run at the executive level, strong relationships with peers, top leadership and functional team members across the organization are critical. Your success in managing relationships will stem from the confidence you have in yourself and your ability to work well with others to make things happen.

## Get Comfortable with Letting Go of What Brought You to the Dance

Being a successful executive does not require you to change who you are, but it may require you to change what you regularly do so that you are more likely to be operating from the state of how you are at your best. To meet the expectations that your peers and top management have of you, you will have to let go of deep engagement in the day-to-day aspects of your function. To develop the confidence needed to succeed as an executive, you will have to explore fields beyond the comfort of the functional skills that brought you to the dance.

### Pick Up Confidence

To play the broader leadership role as an executive, you will have to develop and project a sense of confidence in your judgment that extends beyond functional or technical knowledge. Taking constructive action that moves the organization forward will be a key aspect of how you are assessed as an executive. If you project discomfort or insecurity, your peers will sense it and become uncomfortable with you and your judgment. If you project a confident and comfortable presence, your peers will sense that and will return the favor.

### Silence Your Inner Critic

It's important to recognize when your inner critic is speaking. Interference is whatever keeps you from performing in the position of how you are when you're at your best.

Before meetings, practice by asking questions like these:

- What is the meeting going to be about?
- What is my point of view on that subject?



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service@summary.com

Published by Soundview Executive Book Summaries (ISSN 0747-2196), P.O. Box 1053, Concordville, PA 19331 USA, a division of Concentrated Knowledge Corp. Published monthly. Subscriptions: \$209 per year in the United States, Canada and Mexico, and \$295 to all other countries. Periodicals postage paid at Concordville, Pa., and additional offices.

**Postmaster:** Send address changes to Soundview, P.O. Box 1053, Concordville, PA 19331. Copyright © 2009 by Soundview Executive Book Summaries.

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Rebecca S. Clement, Publisher; Sarah T. Dayton, Editor in Chief; Andrew Clancy, Senior Editor; Edward O'Neill, Graphic Designer; Carol Carter, Contributing Editor

- What outcome do I want from the meeting?
- What ideas will I need to share to reach that outcome?
- What are the top two or three points I want to make?
- How do I want to make them? ●

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### Pick Up Regular Renewal of Your Energy and Perspective

When faced with a challenge, a natural response for many leaders is to bear down and speed up. Having chalked up success after success, they see each new challenge as simply another hurdle to jump over. They believe that all it should take is more of what brought them to that point: smarts and a willingness to work harder and do more than the competition. The problem with this approach at the executive level is that it is one new challenge after another.

If your immediate response in the face of every new challenge is to bear down and speed up, you will eventually run out of gas and crash. Managing the demands of executive life requires picking up regular renewal of your energy and perspective, and letting go of running flat out until you crash.

The transformative challenge for new executives is to learn to take the regular breaks needed to renew the energy and perspective that enable them to perform at their best. Even brief periods of recovery or downtime can make a huge difference in executive performance. For executives who already feel the pressure to get through yet more work, stepping off the treadmill of working seven days a week seems like a leap of faith. But breaking the cycle of continuous exertion allows some time for recovery and reconnection to how they are at their best.

#### Perspective and Peak Performance

Think about how you perform and feel when you are at your most confident and relaxed. It is when your level of engagement is in that sweet spot between apathy and brain-lock inducing stress. Operating at this level of engagement creates the opportunity to perform at the peak of your capabilities and potential. To do that requires developing routines that enable you to recharge your energy stores and regain perspective.

Harvard professor Ron Heifetz makes the point that leaders periodically need to get off the dance floor and up on the balcony. As a leader, it is too easy to be down on the dance floor where all you can see is your partner and maybe a few of the dancers around you. When you take the time to leave the dance floor and get up on the

balcony, you get a perspective on everything that is going on. After you gain that perspective, you can return to the floor and apply your attention where it is needed most.

#### Choosing to Perform at Your Best

As an executive, you will face a lot of pressure to react to dozens of demands on multiple fronts. Because change almost always involves loss as well as gain, you will run into resistance, lack of understanding, anger and other responses that can make life difficult and uncomfortable.

You can choose to react to these demands by taking on more and more meetings, answering e-mail at home every evening, skipping lunch, ignoring your health and key relationships, and basically running flat out until you crash. Alternatively, you can choose to respond to the demands by intentionally establishing routines designed to help you perform at your best.

#### Navigating with Your Life GPS®

Creating your Life GPS® (Goals Planning System) begins with identifying the core characteristics that describe how you are when you are at your best. To identify the characteristics that are central to you, think of situations you've been in when you are the most relaxed, productive, effective or energized. What are the four or five words or short phrases that describe you in your best state? Write them down in the center of a piece of paper.

The next step in creating your Life GPS® is to identify a short list of routine actions in four key domains of experience that — if you do them regularly — would reinforce how you are at your best. Those domains are the mental, physical, spiritual and relational.

If you were going to adjust your routines to allow more time for thinking, what would you spend that time thinking about? Many executives have found the value of establishing daily and weekly routines for short-term and long-term planning. Others make time for regular reading inside or outside their business discipline.

If one of your core characteristics is consistency, a regular set of routines in the physical domain would likely work for you. Develop a set of physical routines that reinforce how you are at your best. The energy that enables each of us to operate at a level of peak performance begins in our body. Make time to regularly renew it.

As you review your list of core characteristics of how you are at your best, identify some routines that draw on those qualities in a way that prepares you to

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leave the place you're in better than you found it. As you consider what routines to pursue in the spiritual domain, reflect on the combination of core characteristics that represent how you are at your best. What could you do to really draw them out and make the most of them for the sake of something greater and longer-lasting than yourself?

The results-oriented focus of the executive lifestyle can be so all-consuming that it is easy to overlook the relationships inside and outside work that make life richer and more complete. When you look at the characteristics that describe how you are at your best, take time to consider how those qualities can inform the routines that will strengthen your most important relationships.

When you are ready to give more consideration to singling out the routines that, if regularly practiced, would reinforce how you are at your best, write headings for the *Mental*, *Physical*, *Spiritual* and *Relational* domains at the 10:00, 2:00, 4:00, and 8:00 positions around the core characteristics you wrote down earlier. Under each heading, write down three or four routines that apply to that domain and align with your core characteristics.

### Results and Perspective

The last step in completing your Life GPS® is to consider the goals and intentions you have in the three key life arenas of home, work and community. Write the heading *Home* at the top center of your page and the headings *Work* and *Community* toward the bottom left and right corners respectively. Write down three or four outcomes you would expect to see in each of the three arenas of life.

Take a few minutes each week to bring yourself back to how you are at your best by reviewing and reflecting on your Life GPS®. Taking this kind of time for review and reflection is a powerful way to pick up the habit of regular renewal of your energy and perspective. ●

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## Pick Up Custom-Fit Communications

Executives don't spend much of their time producing anything tangible. They produce and deal in ideas. For those ideas to be of any value, they have to be well communicated to the right audiences at the right time.

Be very clear about your desired outcome, the audience for your message and what it will take to move that audience toward your desired outcome. Effective executives think strategically about their communications and custom-fit their approach to take into account

where their audience is and where they want their audience to be in terms of thought, feeling and action.

### Communicating with the Whole Organization

As an executive, you are always on stage in your organization. As a result, you need to be much more aware of the impact of your communications than you may have been in the past.

As an executive, you have the opportunity to help shape the communications in the broader organization. If you want to sustain or build an open culture, seek to put people at all levels at ease. Even if this does not come naturally to you, it is possible to develop this approach by being clear about what you're trying to do and intentionally adopting some behaviors that reinforce your goal.

### Communicating with Your Boss

If you find that managing your time is challenging for you as a new executive, imagine what it is like for your boss. You need to be intentional and focused in communicating with your boss. Don't wait for your boss to tell you what information you're supposed to provide and how often you're supposed to provide it. Ask. Adopt a simple and consistent framework for presenting it. A University of Michigan professor offers a communications framework that is built on three simple questions:

- *What?* What issue needs to be addressed or considered?
- *So What?* What are the implications of this issue that make it worthy of consideration?
- *Now What?* What needs to be done next about this issue? What action or support do you need from your boss? What milestones should your boss look for in terms of progress?

It is important to craft and implement an ongoing strategy of keeping the results of your team's good work in front of your boss and your boss's senior executive peers. One of your jobs is to position your functional team for success. When they are successful, your next job is to speak for their success. This is the point at which your personal work will speak for itself.

### Communicating with Senior Executives

Cultivate the habit of asking open-ended questions to learn what is most important to your organization's most senior executives. Align your actions with their definition of success. Your opportunities to make positive impressions on senior executives will come in formal presentations, regular update meetings and more informal conversations. Be prepared with a point of view on the key issues facing not just your function, but the



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company as a whole. Regularly review your short list of key initiatives and priorities, and have a brief speech ready to deliver when a senior executive asks you what you're working on.

A common mistake that new executives make is to focus too much on how they came to their conclusions. To do this is to risk getting labeled as someone who, when asked for the time, explains how to build a watch. Focus much more on your recommendations and their implications than on the mechanics of how you arrived at them.

### Communicating with Peers and Your Team

The foundation of your success as an executive is the strength of your functional team. The custom-fit communications advice with regard to your functional team is to be intentional about creating time to be approachable and available to them. Schedule time for regular and frequent conversations with your direct reports. Take time to walk the floor or go to remote locations to be visible to the folks on the front line.

To communicate what you intend to communicate, manage your presence at least as much as the content of your message. You can't just say you're excited; they need to see it and hear it. ●

### Pick Up Team Reliance

To move successfully to the executive level, you have to develop a heightened level of awareness around your strengths and weaknesses. One of the biggest derailers is trying to do all the functional work yourself once you become an executive. You have to let go now.

### Get the Right People in the Right Roles

You need people on your team who can keep up and contribute to creating successful outcomes. Having the right people in the right roles on your functional team creates the opportunity for you to redefine how you add value to the work of the team and the goals of the organization as a whole. Your role is not to check the work for accuracy, but to frame its broader implications for the organization. The question to regularly ask yourself is this: What is it, that — given the perspective and resources I have as an executive — only I can do?

### Build and Lead

Here are some ideas for how to build effective teamwork:

- Get the team involved in shaping goals.
- Encourage team problem solving.
- Cultivate a diversity of views.

### A Focus on “What”

Steve Rippe, a retired major general in the U.S. Army, is currently COO of the Protestant Episcopal Cathedral Foundation. In that role, Rippe oversees the operations of the National Cathedral in Washington, D.C. A few months after he arrived at the Cathedral Foundation, he concluded that the organization needed a viable plan for conducting a state funeral. He hired a retired lieutenant colonel whose first priority was to update the Cathedral's plan for conducting a state funeral. A few weeks after the new director of operations delivered to Rippe a complete plan for conducting such an event, Rippe's cell phone rang one Saturday afternoon. The Episcopal bishop of Washington was calling to say that he had just received word that former President Reagan had died. The bishop asked him if they should meet immediately to plan the funeral. Knowing that the plan was already complete, Rippe suggested that they meet early the next morning instead.

- Promote honest feedback.
- Show respect and earn trust. ●

### Pick Up Defining What to Do

Instead of telling your team how to do the work, you now need to define the work your team needs to do. By focusing on what rather than how, you will be playing in the realm of the strategic rather than the tactical. Having the right people in the right roles is the key factor that will enable you to get comfortable in picking up defining what to do and letting go of telling how to do it.

Once you have developed clarity for yourself, your next responsibility is to share your understanding of what to do with your team and then ensure that excellent execution occurs.

### Perspective Transference and Setting Expectations

One of the most valuable resources you can bring to your team is the perspective and insight you get from participating in meetings with other executives. Call this dynamic perspective transference. The power of executive level perspective and insight is in how it is used to shape direction and drive action through team members.

Setting expectations with your team should focus on both the what and the how. At the outset of a major project, these are some of the questions that should be asked and answered:

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- When we're successful, what will be different from today's status quo?
- What difference will success make?
- What are the metrics that will help us to measure success?
- On the way to achieving the desired result, what actions are out of bounds?
- What is our deadline?

It is essential to establish clarity with your team on when they should bring you into the stream of work and ask for your perspective and assistance.

### Guidelines, Systems, Levers

Set guidelines for defining what the team should accomplish and provide an appropriate degree of availability to follow up on how progress is being made.

As an executive leader, you need to maintain a stronger measure of control and influence around what needs to be done. The levers of control you use to keep a project on track should place the emphasis on what to do, not how to do it.

By picking up defining what to do and letting go of telling how to do it, you are taking an important step in developing future leaders of your organization, which is one of your primary new responsibilities. ●

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## Pick Up Accountability for Many Results

The distinction between responsibility and accountability turns on who is actually doing the work and how work is defined. In the responsibility model, you are the person who either does the work or closely monitors others who are doing the work. If you are responsible, you are likely to step in and do chunks of the work from time to time. You may even be doing chunks of the work all of the time. Either way, you're almost certainly going to personally make sure that the work comes together well and that it leads to the desired result. Because of the personal attention that the responsibility model requires, a leader can successfully manage only one or just a few results.

Successful executives learn to shift from being responsible to being accountable. The executive leader who successfully picks up accountability for many results is focused on outcomes. Outcomes begin with a clear definition of what to do. Executives who work from the accountability model are defining what to do across a range of issues, applying a perspective that is at a higher level and has a longer-term focus than those of their reporting managers. Their job is to set the agenda and

bring the different streams of work together in a way that supports not just their own agenda, but also the larger organization's agenda. They are accountable for the results that support the agenda.

### Reframing Your Definition of Work

When you operate at the executive level, you face a more intangible and ambiguous definition of what you accomplish on any given day. Your work is to oversee the process. You are learning how to operate in the accountability model and move away from the comfort and familiarity of the responsibility model.

As an executive, you have to let go of personal responsibility for every outcome. Your passion needs to shift from a narrow focus to a broad focus. The manager's questions focus on the day-to-day responsibilities of management reporting, customer satisfaction and new business development. In contrast, the leader's questions focus on the strategies of the competitive positioning of the company, options for expansion and acquiring the talent needed to expand.

### Accountability and Monitoring

The accountability model of executive leadership has three implications:

- "What have you done for me lately?" becomes a more frequent question.
- You own the results for good or bad.
- You and your peers are accountable for solving bigger problems.

Because of the "What have you done for me lately?" atmosphere that can exist at the executive level, you should consider what you can do to manage the stream of your team's results. Ensuring that results are delivered consistently and on time will enhance the reputation of your team and its ability to get things done in your organization. It is also important to communicate to key stakeholders and influencers in the organization the results your team achieves. The work doesn't speak for itself; you have to speak for the work.

Your responsibility is to get the right people in the right roles, provide direction and monitor progress. You are, therefore, accountable for their results.

As an executive, you will regularly be expected to develop solutions to problems that are outside your functional realm of expertise. The problems will be bigger and more complex. You will have accountability for addressing them in collaboration with your executive peers.

Developing and shaping your staff so that they consistently meet the desired level of performance cre-

ates the opportunity for everyone to play at the next level up. For you, as an executive, having a staff that you can empower to deliver results enables you to take the broader perspective that is expected of you. ●

### Pick Up Looking Left and Right as You Lead

Beginning here, we shift the focus from how successful executives lead their functional teams to how they demonstrate presence in the broader organization. That process begins with learning to focus your attention on your peers to the left and right, while also paying attention to those above and below you in the organization.

You are now part of two teams. You are still a member of the functional team that you lead, but you are also part of the leadership team of your organization.

As an executive, you will no longer be able to accomplish the things that matter most on your own. At the next level, interdependence replaces independence. To get things done, you have to know who to work with and who to talk to. You have to communicate your agenda clearly and act in a way that causes your peers to want to support it. There are five important elements of getting things done by persuading and influencing those on your left and right:

- Get to know your peers.
- Build trust.
- Establish credibility.
- Collaborate with your peers.
- Show up as an equal.

### Looking Up into the Organization

By emphasizing the need to look left and right, this is not to suggest that you ignore looking up to the most senior executives or down to your team and the teams of your peers. One of the most important things to focus on with senior management is developing clarity about what success looks like to them. What are the metrics that need to be met or exceeded? What's the deadline for completion? Who has to be happy with the result?

### Looking Down into the Organization

There are a couple of points to make about managing your relationships with the people in your organization who are below the executive level. The first is stay connected. Do this by:

- Staying visible and available.
- Listening without interrupting or appearing distracted.

- Asking open-ended, nonthreatening questions.
- Showing a sincere interest in people.

When your team does not perform at its best, it's important to show openness to feedback about their performance and act on it appropriately. Most of the time, this will mean helping them learn from their mistakes.

The flip side of this issue is striking the right balance on praising your team. At the same time, though, pay attention to when enough is enough.

Help your team stay grounded by helping them understand where they and their work fit into the bigger picture. ●

### Pick Up an Outside-In View of the Entire Organization

As you reach the executive level, the focus shifts from “me and my team” to “us as the leadership team” of the entire organization. That shift from me to us needs to be quickly followed by an additional shift in perspective from us to them. The “them” in this case refers to all the stakeholders and competitors in the external environment.

### Overcoming the “Me Mind-Set”

What got you to the executive level is not what is going to keep you there. As you move to the executive level, the expectation is that you will shift your allegiance from what is best for you and your function to what is best for the leadership team and the organization.

If your modus operandi has been to accumulate or even hoard resources to ensure the success of your function, you will need to quit doing that to be a successful executive. If you are in silo mode, it's difficult to see what really matters to the big-picture success of the organization. It is important to strike the balance between what is best for your agenda and what is best for the organization's agenda.

### Moving into the “Us Mind-Set”

To make the contributions that are expected of you as an executive, you have to view yourself as a leader of the business and not just your function. It's not just about you and your to-do list anymore. It's bigger than that, and your peers and bosses expect you to demonstrate that you understand.

As you begin to put the business first and your function second, you will need to help your functional team understand your operating context. As an executive you will be privy to information that cannot go any further

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than the communication between the executive principals. It is helpful to state up front for your team that you will share as much information as you can with them, but there will be times when it is in everyone's best interest for certain information not to be shared.

### Thinking About "Them"

Sometimes executive teams can become so focused on "us" that they don't think enough about "them." Failure to regularly look at the organization from the outside in is a fairly common mistake that executive teams make. As a new member of the executive team, you may well have the opportunity, as a fresh voice, to encourage your colleagues to challenge their assumptions and take a broader look around. As you move from "me" to "us" to "them," you will find that your comfort level rises as you see the results that come from broadening your field of vision. ●

### Pick Up a Big-Footprint View of Your Role

Expectations change when an executive title appears after your name. Everyone will have different expectations about what you should be doing and how you should be acting as an executive.

You have to pick up a big-footprint view of your role and let go of a small-footprint view of your role. You are going to be much more visible to all the stakeholders in your organization than you use to be. Because of your increased visibility, you will be expected to make a bigger impact in the organization.

### Living with a Higher Profile

When you become an executive, your words will have a greater impact because of your higher role. The way that you use your words can dramatically affect the morale of the organization.

A sure way to damage morale and sink productivity is to casually speak about emotion-laden issues, such as downsizing, reorganization, compensation and benefits, and performance goals. Jokes about job security just aren't funny.

Another dynamic to watch out for is sucking all the air out of a conversation by pushing your point of view too hard. While you may think you are just having a spirited conversation, your subordinates will likely read it as you imposing your will as an executive.

As a member of the executive team, you have both the opportunity and the obligation to seek out feedback from employees about their concerns and what is on their minds. Getting out and mixing with employees on a regular basis is probably the most effective way to shape the

business culture you and the rest of the executive team are trying to create.

### Living with Other High-Profile Types

As someone operating at the executive level, you have a choice to make. One path is approaching the battle for control with clear winners and losers. The other begins with picking up the habit of looking left and right as you lead. Getting to know your peers, building trust, establishing credibility and seeking to collaborate with your teammates are the building blocks of learning to live successfully with other high-profile types.

If you insist on your answer always being the one best right answer, you can easily end up being seen as aggressive and overly critical. Don't waste time proving how smart you are to your peers. Spend your energy on bringing the group together to come up with smart outcomes.

### Mind Your Message

You are the message for yourself and for your company. Assume that there are always people out there forming impressions based on the message you send.

A good rule of thumb for how to dress as an executive is to look at the successful people one level up and follow their lead.

When you're in a meeting, put away the BlackBerry, cell phone, pager, laptop, Palm Pilot and anything else that allows you to multitask. With the big footprint of an executive, you are the message. Act accordingly.

### Play a Bigger Game

As an executive, you are expected to take action and work with your peers to make an impact for the organization. You are expected to deliver a series of positive results over time.

Things will continue to happen whether you're on board or not. If your goal is to make the most of the bigger footprint that is available to you as an executive, then you need to be on board. ●

#### RECOMMENDED READING LIST

If you liked *The Next Level*, you'll also like:

1. ***The First 90 Days* by Michael Watkins.** If you've been thrown into the ranks of management, this book will give you the road map for your first 90 days. Watkins offers specific and practical steps to secure wins.
2. ***Talent Is Never Enough* by John C. Maxwell.** Maxwell, a leadership expert, attests that talent is often misunderstood and overrated. To combat this, he outlines 13 crucial things that you can do to maximize your strengths and become a "talent-plus" person.
3. ***Put the Moose on the Table* by Randall Tobias with Todd Tobias.** The former CEO of Eli Lilly and Co. shares anecdotes, experience and his beliefs. Tobias expounds on his approach to leadership, including values, empowerment, success and integrity.