

OCTOBER 2018



It starts with us Leadership Shadow

Questions for CEOs and Senior Executive Teams

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It starts with us

As Champions for Change, we have a collective vision of a prosperous and equitable Aotearoa New Zealand, led by a new generation of diverse leaders driving economic success and social prosperity.

At the core of our vision, is a deep, personal commitment by each of us as leaders to drive individual action that contributes to collective impact.

Global Women and Deloitte recently partnered to discover how included New Zealanders feel at work and understand what the drivers of inclusion are. The research report found inclusion scores were 34% higher in organisations where senior leaders speak up and challenge the status quo. Further, inclusion scores were approximately 30% higher in organisations where senior leaders and managers hold others to account if what they say or do is not inclusive.*

Often, the critical missing link on inclusion and diversity for many organisations is strong CEO and Chair involvement. By putting our stamp on diversity initiatives as part of a proactive strategy, we strive to be enablers of change from the top down.

The Leadership Shadow exercise is part of our individual commitment as leaders, and as Champions for Change, in ensuring we show up as the best possible versions of ourselves – acknowledging that change starts with us. We encourage you to complete the exercise with an open mind and a willingness to take the feedback on board to support your growth as a leader. We also encourage you to share the exercise with others in your organisation, specifically your Senior Executive team, in an effort to extend the impact of the exercise for wider organisational change.

We trust you find the experience valuable and we look forward to sharing our insights at upcoming Champion Summits.

CO-CHAIRS CHAMPIONS FOR CHANGE



MICHELE EMBLING
CHAIR PWC



DAVID MCLEAN
CEO WESTPAC

* Report by Global Women and Deloitte (2018): How inclusive do New Zealand workplaces feel? And what can you do about it? <https://www.globalwomen.org.nz/assets/GW-inclusion-report-for-web.pdf>



What is the Leadership Shadow?

The Leadership Shadow model is a self-reflection tool developed to help leaders focus on actions and behaviours found most likely to support progress on inclusion and diversity. It is based on the idea that the path to lasting performance improvement on any priority – like inclusion and diversity – starts at the top.

What we say, how we act, what we prioritise and how we measure, together determine what gets done (and what doesn't). These four elements make up the Leadership Shadow model, which allows a self-reflective process to take place to determine whether the imprint of your words and actions is as clear and powerful as you want it to be.

The model is flexible. It is intended as a guide to prompt specific areas of focus, that when tweaked, can have a positive impact on your ability to lead an inclusive and diverse organisation, or Board. Insights and action points that come from this exercise will be unique for each individual and dependent on the quality of the conversations that take place.

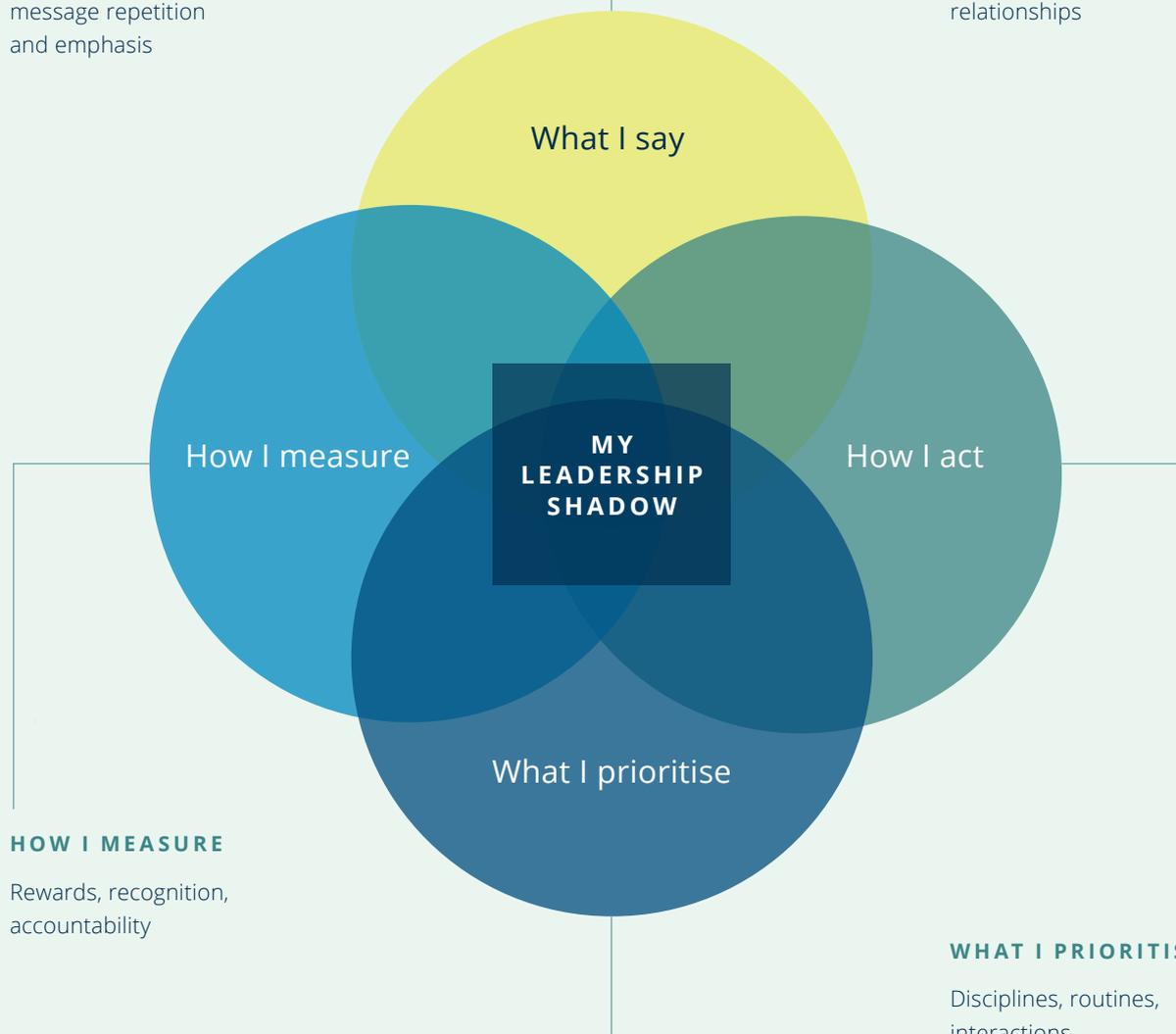
My Leadership Shadow

WHAT I SAY

Values, context setting,
message repetition
and emphasis

HOW I ACT

Behaviours, symbols,
relationships



HOW I MEASURE

Rewards, recognition,
accountability

WHAT I PRIORITISE

Disciplines, routines,
interactions



How to complete the exercise

The following process and considerations are important to note prior to commencing the exercise.

PROCESS

Step 1: Champion Task **Complete self assessment**

As a Champion, you will complete an initial self-assessment to identify the learning gaps where feedback may be of most value. This will include setting some time aside to review the questions, determining your personal response to each of the questions (30 minutes to 1 hour). This initial self-assessment should then inform which questions or areas of focus are most relevant, based on individual requirements and areas of interest.

Step 2: Champion Task **Identify key learning gaps**

The intention of the self-assessment is to identify key learning gaps. These are the 1 to 3 areas with the most potential to stretch and challenge your thinking, and where you are most interested and open to getting feedback. We encourage you to be courageous in your choices, and to choose the learning gaps that will most challenge you.

Step 3: Champion and Implementation Lead Task **Champion and Implementation Lead to work together to confirm a diverse selection of contacts to interview (up to 10 people).**

To gain further insight on your learning gaps, select up to 10 people to interview. As part of the interview process they will be asked for their input and perspectives of you, based on the questions you have identified as most relevant. Consider the gender and ethnicity of the people you choose to speak with, and

the hierarchy of interviewees within the organisation to ensure a diverse range of views are captured. For example, you may choose to complete interviews with a member of your Board; a member of your Senior Executive Team; 1 to 2 employees; and an industry contact outside your organisation (another industry leader). Small focus groups or other feedback forums may also be used to gain broader diversity of input, and to support the 1-1 interviews.

Step 4: Champion and Implementation Lead Task **Confirm interview approach**

Champion and Implementation Lead to agree on who will complete the interviews. Consider the dynamics of each conversation, and any organisational hierarchy and power differentials that may prevent a safe space for honest feedback.

OPTIONS FOR COMPLETING THE INTERVIEWS

The Leadership Shadow exercise can be completed in various ways. Here are some options:

Option 1: As a Champion, you self-select up to 10 people to speak with directly about their responses to the Leadership Shadow questions. How do they view what you say, the way you act, what you prioritise and how you measure? You then record their responses and self identify your insights and action points.

Option 2: As a Champion, you nominate your Implementation Lead to carry out a set of interviews on your behalf. Again, you identify up to 10 people (considering suggestions from your Implementation Lead) and your Implementation Lead then meets independently to explore their views on what you say, the way you act, what you prioritise and how you measure.

Option 3: You may choose to do a blend of the above two options - as a Champion, you interview several people, and you then nominate your Implementation Lead to interview the other selected interviewees. As mentioned, the model is flexible. The key intention is to gather feedback and insights that lead to a commitment to action.

Option 4: You may choose to engage an external consultant to conduct the interviews on your behalf.



Step 5: Implementation Lead Task Agree deadline and book conversations

Agree on the date for which all interviews should be completed by, and book each of the interviews in advance. Set clear expectations and send a copy of this workbook in advance of the interview, so interviewees are aware of the process.



Step 6: Implementation Lead Task Complete interviews

The Implementation Lead should take charge of ensuring the timetable of interviews take place in a timely manner, and should manage the collation of feedback (see template for synthesising feedback on page 14 of this workbook). This may include liaising with any external consultants to ensure the consistent management of the project.



Step 7: Champion Task Set action points

Once feedback is collated, it is your role as a Champion to set your personal action plan. What are the tweaks to your leadership style that could have the biggest impact on your ability to successfully create and lead an inclusive workplace?

CONSIDERATIONS

Questions as a guide. The list of questions in the Leadership Shadow exercise is extensive, however, the questions are a guide only. The intention is not to necessarily work through the questions from start to end, but rather to use the list as a guide or shopping list for potential areas of focus.

Length of interviews and presence. It is essential that sufficient time is set aside to complete each of the interviews (we recommend 1 hour per interview). During this time, both the interviewer and the interviewee must commit to being present and open to feedback.

Levels of comfort: As a Champion, if you nominate others to do the interviews on your behalf, you must ensure a trusted relationship is in place where you feel comfortable receiving feedback openly from the nominated interviewer.

Encourage other leaders to also complete the exercise. You may also choose to encourage your senior leadership teams, and other leaders within your business, to complete the Leadership Shadow exercise. This will help extend the impact of the exercise for wider organisational change.

ELEMENTS OF A GREAT INTERVIEW

- Set clear expectations and send a copy of this workbook in advance of the interview, so interviewees are aware of the process.
- Be genuinely interested in the process and the outcome.
- Create a safe environment based on trust and respect (consider organisational hierarchy and power differentials, to ensure a safe space for honest feedback).
- Use active listening, where you reframe from interruptions and listen openly to the responses from the interviewees.
- Reflect what you are hearing, to ensure an accurate understanding of the feedback. For example, "I hear you saying... is that accurate?"



What I say

Values, context setting, message repetition and emphasis

Please rate responses to the following questions on a scale of 5 to 0, and include more detailed insights and reflections on the adjacent page. This will support both a quantitative and qualitative feedback process.

	Almost all of the time / very well (score 5)	Most of the time / mostly well (score 4)	About half of the time / average (score 3)	Sometimes / less than average (score 2)	Almost never / not well (score 1)	None of the time / not at all (score 0)
DELIVERS A COMPELLING CASE FOR DIVERSITY IN GENDER AND ETHNICITY:						
How well, and often, could others articulate why diversity and inclusion matter to <insert name>?						
How often, and in which forums, does <insert name> talk about inclusion and diversity as a priority?						
How visibly does <insert name> advocate for inclusion and diversity objectives externally? With their suppliers, and partners?						
PROVIDES REGULAR UPDATES AND CELEBRATES PROGRESS						
How well are inclusion and diversity objectives integrated into regular reporting?						
How often does <insert name> talk about, and celebrate, the organisation's initiatives, actions and outcomes with reference to inclusion and diversity?						





How I act

Behaviours, symbols, relationships

Please rate responses to the following questions on a scale of 5 to 0, and include more detailed insights and reflections on the adjacent page. This will support both a quantitative and qualitative feedback process.

	Almost all of the time / very well (score 5)	Most of the time / mostly well (score 4)	About half of the time / average (score 3)	Sometimes / less than average (score 2)	Almost never / not well (score 1)	None of the time / not at all (score 0)
IS A ROLE MODEL FOR AN INCLUSIVE CULTURE						
How well does <insert name>'s team represent different views and ways of operating?						
How well does <insert name> reward and promote a track record of inclusive leadership?						
How comfortable is <insert name> in addressing his/her own biases?						
BUILDS A DIVERSE TEAM						
What signal does the composition of <insert name>'s top team send to the organisation?						
If <insert name>'s leadership team does not have visible gender and ethnic diversity, how well does <insert name> acknowledge the imbalance and take visible steps to address it?						
How well does <insert name> consider diversity objectives when selecting people to lead major initiatives?						
CALLS OUT BEHAVIOURS AND DECISIONS THAT ARE NOT CONSISTENT WITH AN INCLUSIVE CULTURE						
How well does <insert name> consistently work to understand and address unconscious bias in policies and processes?						
How well does <insert name> articulate standards of acceptable and desired behaviours in relation to inclusion and diversity?						



What I prioritise

Disciplines, routines, interactions

Please rate responses to the following questions on a scale of 5 to 0, and include more detailed insights and reflections on the adjacent page. This will support both a quantitative and qualitative feedback process.

	Almost all of the time / very well (score 5)	Most of the time / mostly well (score 4)	About half of the time / average (score 3)	Sometimes / less than average (score 2)	Almost never / not well (score 1)	None of the time / not at all (score 0)
ENGAGES SENIOR LEADERS						
How well could <insert name>'s team describe our inclusion and diversity expectations and the level of priority? How might they describe these priorities?						
How much progress has been made by the senior governance body, such as the Diversity Council, vs. other high priority initiatives?						
PLAYS A STRONG ROLE IN KEY RECRUITMENT AND PROMOTION DECISIONS						
Where needed, how effectively is <insert name> sponsoring diverse talent to ensure equal access to opportunities?						
How much time does <insert name> spend with senior and emerging diverse talent?						
How well does <insert name> understand diverse perspectives and priorities?						
CHAMPIONS FLEXIBILITY						
How well is <insert name> working to break down bias that may exist against flexible workers?						
How, and how often, does <insert name> recognise and celebrate individuals who are building flexible teams?						
How often is <insert name> transparent about his/her personal practices to manage their own work-life harmony?						
How visibly and regularly do people on <insert name>'s team work flexibly?						

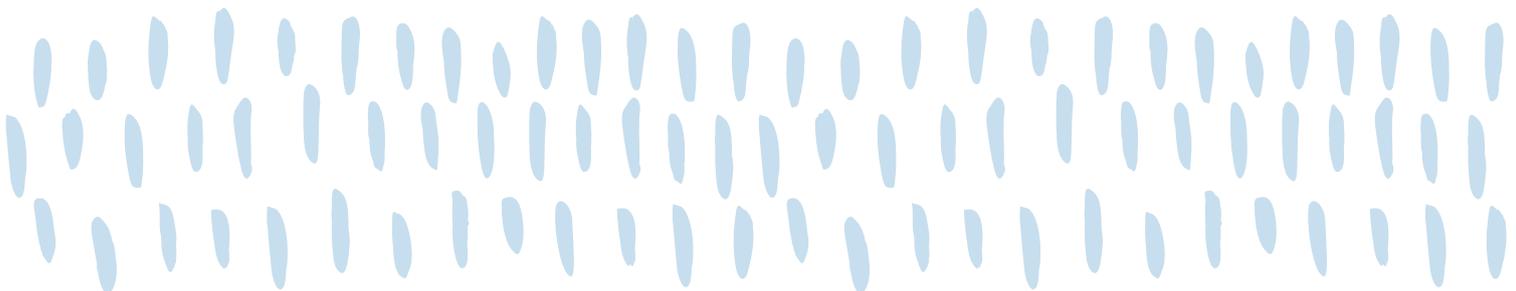


How I measure

Rewards, recognition, accountability

Please rate responses to the following questions on a scale of 5 to 0, and include more detailed insights and reflections on the adjacent page. This will support both a quantitative and qualitative feedback process.

	Almost all of the time / very well (score 5)	Most of the time / mostly well (score 4)	About half of the time / average (score 3)	Sometimes / less than average (score 2)	Almost never / not well (score 1)	None of the time / not at all (score 0)
UNDERSTANDS THE NUMBERS AND LEVERS; SET TARGETS						
Has <insert name> set diversity reporting measures, or targets? How well does <insert name>'s diversity reporting provide sufficiently granular insight?						
Compared to other business priorities, how robust is the progress review process?						
HOLDS THEMSELVES AND THEIR TEAM TO ACCOUNT						
How well is <insert name> held to account for diversity and inclusion objectives?						
How integrated are discussions about diversity and inclusion into the performance appraisals of <insert name>'s team?						
GETS FEEDBACK ON THEIR OWN LEADERSHIP SHADOW						
How consistently is <insert name> working to improve their leadership on inclusion and diversity?						





Collating the responses

SYNTHESISE THE RESPONSES

Once you complete the interviews, spend some time synthesising the information into key themes:

What are the key patterns or consistent themes that emerged from responses?

What were some of the challenges or pain points that emerged from responses?

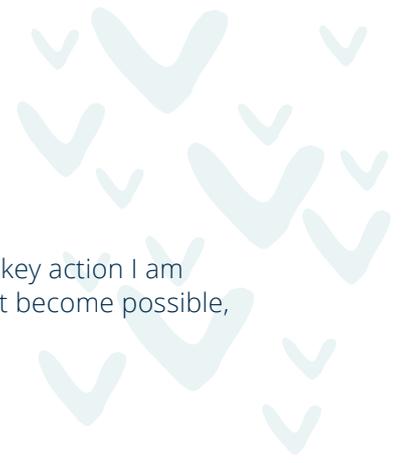
What would people like to see more of?

How will they know when this is happening?

What are the key focus areas, that when addressed, may have the biggest impact on the organisation? Why have you identified these areas?

Personal action plan

Based on the insights and reflections achieved in this process, what is one key action I am committing to within each quadrant of my Leadership Shadow? What might become possible, by a few small tweaks of my leadership style?



What I say

How I act

What I prioritise

How I measure



Our measure of success

As Champions for Change, we are committed to creating measurement and accountability, which means we hold ourselves accountable, internally and externally, for change.

AS SUCH, WE COMMIT TO REVISITING THIS EXERCISE EVERY 12 MONTHS, TO MEASURE:

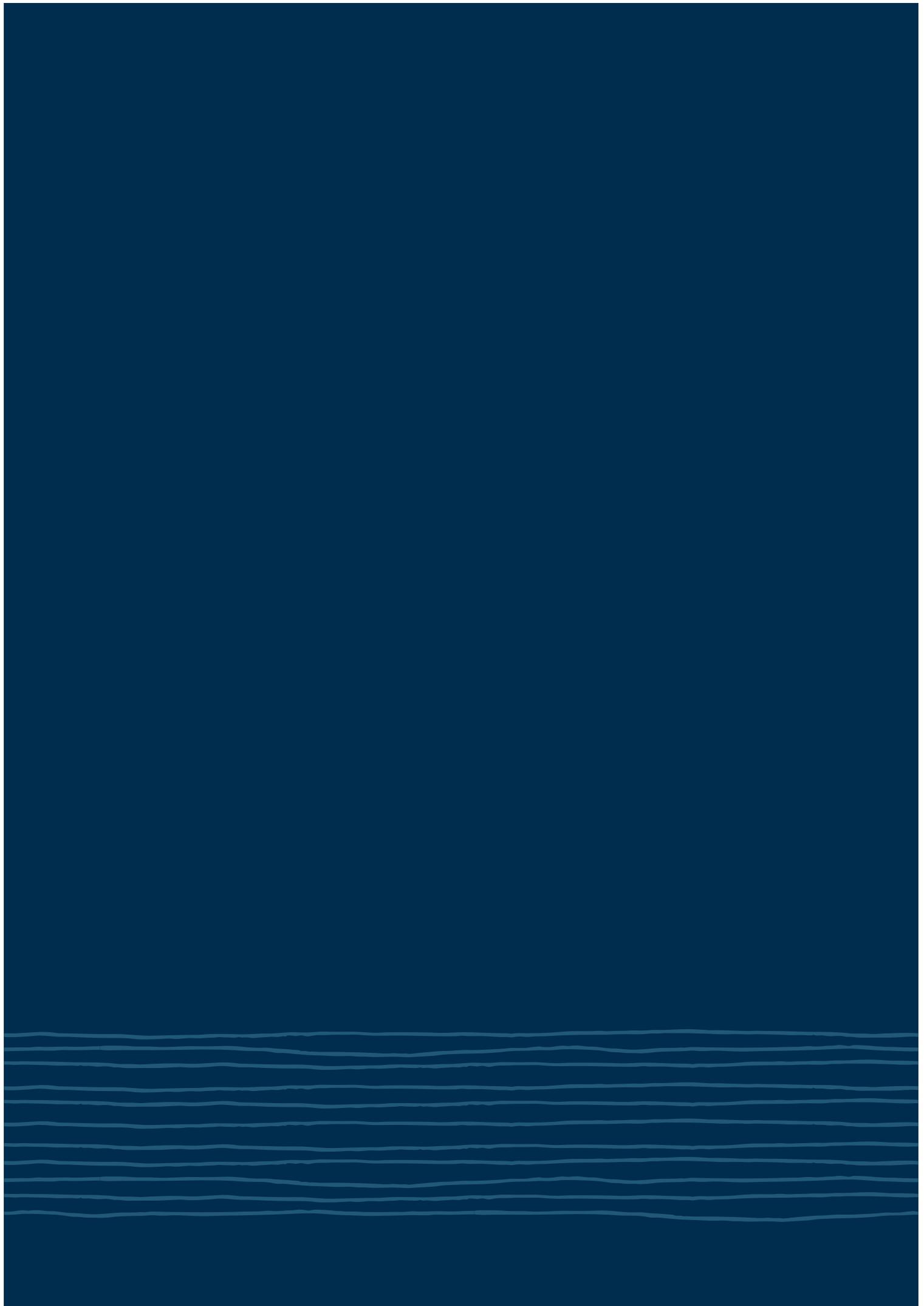
- Updates on our action points
- Examples of changes we have noticed
- Other anecdotal feedback within the group.

We then commit to repeating the exercise and setting a new set of action points as we continue to develop as leaders.

Acknowledgements

Initially developed by the Male Champions of Change and Chief Executive Women in Australia, the New Zealand Champions for Change group received permission to use the Leadership Shadow model. Earlier works of the Leadership Shadow for gender balance were based on work provided by Pine Street, the leadership development group of Goldman Sachs. We are grateful for the opportunity to collaborate and share resources, and we thank all parties who have made this collective exercise possible. Thank you.

The Global Women Leadership Development Team has subsequently provided support in defining an implementation process and expanding this model for the New Zealand market. For support in using this model, please contact champions@globalwomen.org.nz





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