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DEEP RELATIONSHIPS. ENDURING LEGACIES.

The Big Five

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A lot has been written about the human side of leadership. This of course includes personal effectiveness with people and with teams; i.e. the ability to influence others to get things done. Some have referred to these as “soft skills”, although most would admit that they are actually harder to implement and carry out given the complexity of characteristics and behaviors it takes to pull off effective leadership.

In coaching and developing leaders in organizations and families over the past 25 years, these are the factors that can really make a difference in the quality of relationships that impact effectiveness in getting things done. However, there is another very important tool in leadership that we have found is also essential to effectiveness. This is in the area of what we have referred to as “executive functioning” or “executive management”. This is the ability to see a situation or project and to then skillfully organize others to productively accomplish a task. We have come to call this “The Big Five of Task Leadership” and have seen tremendous results in the teaching and application of this model.

The five steps are: 1. Define the outcomes/goals/results that you would define as success, 2. Set the strategy for best achieving the outcome, 3. Determine the steps of the plan to carry out the strategy to achieve the outcome, 4. Define roles of participants in the task and what success will look like in their role, and 5. Set the timelines and methods of critique and measurement as the process moves forward.

While these steps may seem like common sense, they are not automatic, but rather must be intentionally and systematically followed and carried out or it will negatively impact achieving the goal. The following discusses how best to achieve this:

1. **Define the outcomes/goals/results that you would define as success.**
To best achieve this, there needs to be a thorough vetting of what success would look like. Often in organizations, executives are taking many initia-

tives at once and working to carry them out without really thoroughly vetting what success looks like and what it will mean to achieve it. The leaders who seem to be the best at doing this are the ones who are visionary, in that they are able to paint a picture for others about how things could be. They are also open and flexible to hearing the input and ideas from others on the team and can re-assimilate the visions with new, more relevant data. Facilitating and achieving an agreement about the ideal outcomes is a critical first step in the Big Five.

2. Set the strategy for best achieving the outcome.

In my experience, this is the step that most often gets skipped. It is especially easy to confuse it with the next step of planning. It is very easy to “get seduced by the task”; in other words, to be so focused on getting something accomplished that there is not adequate time invested in how to best tackle it. I like the example of climbing a mountain. You might have each step articulated in terms of what you are going to do, but if you do not have an overall strategy with how to best deal with the elements, you may be successful in carrying out the plan, but not achieve the overall outcome. This can especially be seen in companies that want to achieve an increase in sales, but do not really understand their markets and how to best access them. When leaders work in and with a team, you will find members that are very good at this if given a voice. It is, however, critical to define for the team what strategy is, and assist them in developing it before jumping into the planning process.

3. Determine the steps of the plan to carry out the strategy to achieve the outcome.

This involves laying out each tactical step in carrying out the strategy. If your strategy is good, this is fairly easy. In a team planning process, leaders will often find that if they have a solid working group, that they will collectively come up with the steps necessary and not leave out important areas.

4. Define roles of participants in the task and what success will look like in their role.

It is critical that each person who is a part of carrying out the strategy understands their role and their part in achieving the overall objective. This also helps them see where they will take the lead and where they will collaborate. This sets up realistic expectations and prevents misunderstanding. A common phenomenon in organizations is that when a participant does not have a clear role, they make one up. This of course creates confusion and barriers to accomplishing the outcome.

5. Set the timelines and methods of critique and measurement as the process moves forward.

A CEO I once worked with was fond of saying, “That which is measured gets done”. It is critical to the success of any project that the leader establishes at the front end what the measurements of success are, so that it is clear when you achieve it. It is also important to plan in critique as part of the process; so that there are points where the participants stop and measure progress against the goals. This is also a good time to look at what is working and what is not and to make adjustments. One of the characteristics of high performance teams is their ability to self-correct. The process of intentional critique at key moments increases the likelihood of attaining the goal. Along the same lines, timelines need to be established so that everyone is on the same page and managing the time involved and hitting critical deadlines.

Over the years of working with leaders both on the job and in workshops, it is surprising how often you see missed steps in this process. Although this process seems intuitive, it requires intentionality to make it happen. John Wooten, the famous football coach once said, “Be quick, but do not hurry”. This was the key to his success as a football coach in that he meticulously built in the steps of team work and key elements so that the team could then implement them quickly. The same is true for the elements of taking charge and leading others through a task.