



**MGMT 671, Spring 2014**

**The Wharton School  
University of Pennsylvania**

**Prof. Stew Friedman  
Teaching Assistant: Michelle Rajotte (WG '07)**

[www.totalleadership.org](http://www.totalleadership.org) | [beta.totalleadership.org](http://beta.totalleadership.org)

**Class meets Tuesdays and Thursdays from 3:00 to 4:20 in 105 SH-DH**

It's a new era for leadership in business. Emerging economic, social, and cultural pressures demand that business leaders, at all levels in an organization, find better ways to align their leadership vision, core values, and everyday actions to produce needed, valued results at work as well as at home, in the community, and for the self.

Most approaches to learning business leadership focus on performance and results. In this course the focus is on growing your capacity as a leader in all aspects of your life. We start with you, the developing leader, as a whole person. The challenge is to use leadership skills to improve performance in all domains of life — traditionally seen as conflicting — which can, with a shift in mindset about the meaning of work and the development of new skills, become allies in producing results that matter most.

Now more than ever leadership is not just about work, it's about life. Success in the new world of business requires us to see leadership and life as pieces of the same puzzle. Total Leadership is a proven method for integrating work, home, community, and self — and improving performance in all these parts — by the powerful combination of increased authenticity (being real), integrity (being whole), and creativity (being innovative).

The primary goal is for you to learn more about what it takes to be an effective leader — no matter what your position or role in an organization — and to make real progress towards becoming one. In this course you have the opportunity to learn the principles of Total Leadership, how to apply them to your own leadership challenges, and how to teach others to do the same. You are the “live case.” This involves learning about your self and creating change in your world. This requires serious and deep introspection; intensive dialogues about what really matters, performance expectations, and how things get done with key stakeholders in all domains; and creative action intended to produce better results at work, at home, and in the community and for your self.

You work closely and interdependently with your classmates to create an interactive community in which you learn and are enriched by their experiences. The instructor facilitates discussion and students are expected to come prepared to highlight what from the readings is most useful and important. We use a variety of methods to support learning by doing; peer coaching, readings, class dialogues, interaction with alumni, and extensive written assignments to both prepare for and reflect on your actions.

## Total Leadership Principles

The course is built around the three principles described below, and it is designed to bring them to life in a way that is customized to the needs and interests of each student.

### **Be Real**

*Act with authenticity by clarifying what's important*

Leaders define and articulate a vision that embraces the diverse values and lifestyles of all employees. Their everyday actions fit with not only their personal values but also with the core values of the business. Through continual observation and reflection they know their priorities, their strengths and weaknesses. They strive to increase commitment to shared goals through genuine dialogue with key stakeholders (that is, the people who matter most), telling their own story to the people about whom they care most, in all life domains. And they hold themselves and others accountable for pursuing valued goals.

### **Be Whole**

*Act with integrity by recognizing and respecting the whole person*

Leaders take responsibility for respecting the value of all aspects of their lives; at work, at home, in the community, and in themselves (their health, spiritual growth, and leisure). They align the interests of different stakeholders in gaining support for collective goals as well as set, maintain, and respect the boundaries that enable value to be created at work and in other aspects of their lives. They invest in social capital to nurture networks and partnerships that provide the support needed for achieving results that matter.

### **Be Innovative**

*Act with creativity by experimenting with how things get done*

Leaders continually re-think the means by which goals are achieved in ways that force a results-driven focus and provide maximum flexibility with choice in how, when, and where things get done. They have the courage and openness to experiment with new work methods and new media for communication to better meet performance expectations. They reduce reliance on traditional methods, such as face time and co-location of resources, while using them more wisely to build trust when needed and, at the same time, taking advantage of the flexibility and control afforded by new media.

## Course Plan



### *Begin*

- Compose statement of interest
- Complete TL Surveys 1
- Overview course goals and set performance expectations
- Understand Total Leadership principles and method



### *Be Real: Clarify What's Important and Take the Four-Way View*

- Explore being real – acting with authenticity by clarifying what's important
- Articulate your personal leadership vision – your legacy – and your values
- Take the four-way view – work, home, community, and self (mind, body, spirit)



### *Be Whole: Respect the Whole Person and Talk to Your Stakeholders*

- Explore being whole – acting with integrity by respecting your most important people
- Identify key stakeholders in all parts of life and mutual performance expectations
- Understand the purpose of stakeholder dialogues, prepare for and conduct them
- Realize the value of creating trusting relationships and learn how to build them
- Explore how to use various media to build relationships and achieve results
- Review insights from dialogues with key stakeholders
- Discover how to enhance integrity by making the parts fit together better as a whole



### *Be Innovative: Design Experiments and Bring Others Along With You*

- Explore being innovative – acting with creativity by experimenting
- Review designs for experiments to produce four-way wins, with demonstrable benefits for work, home, community and self (mind, body, and spirit)
- Upgrade experiment designs based on feedback from coaches
- Understand barriers to change and how to overcome them
- Learn about managing risk when leading change
- Understand social capital and the reciprocity principle
- Build support for achieving valued goals



### *Reflect and Grow*

- Learn more about leadership by studying great leaders' lives
- Understand the value of storytelling for leadership
- Tell your own leadership story and listen to others'
- Review course goals, results, peer feedback, and lessons learned
- Generate ideas for sustaining your growth as a leader / Complete TL Surveys 2

## Schedule for Exercises

Course exercises are posted at [beta.totalleadership.org](http://beta.totalleadership.org). Exercise numbers listed below correspond to the numbering system on this site. Sets of exercises are weighted (Wt. = 1x, 2x, 3x, or 6x) to indicate roughly differences among them in expected effort.

Please be specific and comprehensive when answering questions and completing exercises. The more you are able to detail your thoughts, the more you will get from these exercises and the better positioned your peers will be to help give you feedback.

Most exercises will be discussed in our class sessions. In addition, reading and commenting on others' exercises, beyond those assigned to you in your coaching team, is strongly encouraged. Our program is designed to be an open environment that creates a learning community. The more you contribute to others the more you learn.

**All exercises are due by 11:00 PM EST, except when otherwise noted.**

Due	Exs.	Wt.	Description
1/16	01-07	3x	TL Survey 1 / Begin and Be Real Exercises
1/20	08	1x	Comments on Begin and Be Real Exercises / Meet w/ TLM
1/30	09	1x	Reflections on Coaching: Begin and Be Real Exercises
2/2	10-15	3x	Be Whole: Stakeholder Analysis
2/5	16	1x	Comments on Stakeholder Analysis
2/7	17	1x	Reflections on Coaching: Stakeholder Analysis
2/26	18	3x	Be Whole: Stakeholder Dialogues
2/28	19-20	3x	Be Innovative: Designs for Experiments
3/3	21	1x	Comments on Dialogues and Designs for Experiments
3/6	22	1x	Reflections on Coaching: Dialogues and Experiments
3/20	23-24	2x	Serve <i>Their</i> Interests
3/25	25-26	2x	Network Analysis / Help Fest!
4/1	27	3x	Leader Biography
4/4	28	1x	Reflections on Coaching: Implementing Experiments
4/23	29	2x	Peer Feedback
4/25	30-33	6x	Reflect and Grow: Progress Report
4/28	34	1x	Comments on Progress Report
5/2	35	1x	Reflections on Coaching: Progress Report / TL Survey 2

## About Total Leadership Exercises

### Purposes

The initial exercises are designed to help you understand the Total Leadership model and how to use your experiments to learn about achieving four-way wins; to take meaningful steps towards becoming a better leader, having a richer life. Each of the exercises gives you a different perspective on how the principles apply to you. The

exercises in the first two parts of the book provide a disciplined approach to building a systems view of the domains in your life. Your experiments, in the third part, create opportunities for you to practice the skills associated with being innovative.

*Everyone has their own comfort level about how much they wish to disclose about the various domains of their lives. There is no intent to intrude into your privacy (please see p. 8). If the exercises feel intrusive, please discuss your concerns with Prof. Friedman.*

These exercises are to be completed in sequence because they are organized using a systematic approach and set of principles. As you learn more, it is expected that you will want to review and refine your responses to the exercises. It is useful to take your time and to be thoughtful about your responses on the initial exercises because they influence your subsequent dialogues with stakeholders and actions in your experiments. Again, it is expected that, by the end of your experiments, you will learn more about achieving both greater compatibility among the domains and greater satisfaction of stakeholder expectations. Your initial assessments will look different than they did at the start, indicating personal growth and lessons learned about creating change.

### **Measurement**

The assessments track performance, satisfaction, and alignment at the beginning and at the end of our course. This allows for an examination of three kinds of changes that result from experiments. The standard assessments (done by all) are described below and detailed in the book and elsewhere. You will also design your own customized metrics to monitor actions and assess results of your experiments.

### Performance

The standard performance assessments focus on:

- *My Total Leadership Skills* (an 18-item survey). For each of the main principles of Total Leadership – Be Real, Be Whole, Be Innovative – there are six items.
- *My Life as a Leader*. For each of the three Total Leadership principles there are three items in this nine-item survey.
- How well you meet performance expectations of your key stakeholders. You assess stakeholder performance in exercises in the Be Whole part of the program and then again at the end, thus comparing before and after your stakeholder dialogues and experiments.

### Satisfaction and Well-Being

You assess your satisfaction and well-being in each of the four domains and your life as a whole, at the start and end of our course.

### Alignment

Alignment refers to how well the four different domains of your life complement and enhance one another, rather than compete with one another; how compatible they are. The two standard assessments of alignment are the Four-Way Attention Chart and the Four Circles. Both are completed in the first part of our course and again at the end.

## About Peer and Alumni Coaching

Read Appendix A before getting started on your participation in our coaching network as both peer coach and client. Follow the guidelines there and below when completing your comments on exercises. To receive credit for having completed the exercises in which you comment on your peers' work, at a minimum provide a comment on the last exercise in the set that address all of the exercises in the set by each of your clients.

Peer-to-peer feedback is a critically important aspect of our course. There are many opportunities for giving and receiving both written and verbal coaching throughout our course. Your performance as a coach will have a substantial impact on the value of our course. Constructive feedback should not be thought of as "having all the right answers". Instead, provoke your client to examine the issues further by providing encouragement and by asking the right questions of his or her work. To ensure that you do this, ask *yourself* these questions:

- What points have been left unanswered?
- Where does he/she need to be more specific?
- What is another approach for tackling the issue?

Conclude your comments on each set of exercises composed by your clients with a note on your observations about both strengths and areas for improvement. Add any suggestions and ideas that you believe will be useful. Participants are sometimes unsure how much is too much or too little when it comes to commenting on another participant's work. There are no hard and fast rules for the amount of feedback you should provide. However, keep in mind that your clients are here because they want to learn. The more you engage actively as a coach in provoking further thought, the better. Don't hold back!

As part of each of the four peer coaching exchanges, you provide feedback to each of your coaches (including your Alumni Coach, see below) to let them know what they did well and how they might be more helpful in providing written and verbal coaching. The purpose of this feedback is to improve the quality and impact of both the written and verbal coaching in each successive round, and beyond our course.

Alumni Coaches (ACs) are Wharton alumni of the Total Leadership course who have volunteered to serve as coaches for current students. You will be introduced to your AC prior to the start of our course and you are expected to make arrangements to meet with him or her (most likely by phone or video conversation) to get to know each other and decide how you plan to work together throughout the semester. Your AC – who is a volunteer – is expected to read and provide feedback to you on your exercises.

Experience has shown that relationships with ACs are most effective when the student takes the initiative to be in regular contact with the AC, is open to the AC's ideas and observations, and provides feedback to the AC about what is working and what can be improved in the AC's performance.

## Administration

### Materials

Friedman's *Total Leadership: Be a Better Leader, Have a Richer Life* (Harvard Business Press) is the core reading. Other readings and exercises are available online, and new ones may be added, depending on student interest. For certain assignments, you will need to acquire additional readings or materials. You are expected to complete all assigned readings on time and be ready to apply them in class and in assignments.

### Grading

Your course grade is determined by the total of your scores on the following:

<u>Activity</u>	<u>Points</u>
Course contribution	25
Written assignments	75

#### Course contribution

Your contribution grade is based on quantity and quality of what you bring to our work:

- Class sessions: show up (attendance will be taken); be prepared to discuss readings and their relevance for you; present your ideas in a way that others can understand; ask thoughtful questions; and be compassionate.
- Usefulness of contributions to online discussions and other online activity.
- Any other initiatives you take to advance course goals.

#### Written assignments

The system for evaluation and feedback on assignments is designed to provide a simple process for tracking your progress. You will get a note from either Stew or Michelle (our TA) via our Web site on each set of exercises. This note will appear as a comment on the last exercise in each set of exercises. Also, in Stew's file folder is his *Notes on Exercises* file, which has general comments on each set of exercises. Please read these comments when you're writing each set of exercises, or just afterwards, when you get feedback from your coaches. If you would like more specific feedback on your individual exercises, please let us know and we will be happy to provide it.

If your exercises do not meet expectations, it's usually a matter of incompleteness, insufficient information, or lack of understanding of key principles. Most students meet expectations, which means posting on time, demonstrating grasp of key principles, and presenting information and ideas coherently and cogently. To exceed expectations is to demonstrate exceptional understanding and application of key principles and to address all issues very comprehensively. Assignments are weighted (1x, 2x, 3x, and 6x) to indicate roughly the differences in expected effort (see Schedule for Exercises, above). To pass the course you must complete all the exercises.

## Posting Your Assignments and Commenting on Others'

Post all assignments on beta.totalleadership.org. Except when indicated otherwise, all assignments should be posted as exercises on this site. Instructions are posted in the Forum for our course's group, **2014 Spring Wharton MBA**.

The instructor or TA will read and evaluate your exercises, and two other students will provide feedback on them, as you will do for them. In this way you will be both coach and client for two others in our class. You are encouraged (with extra course contribution credit) to comment on other participants' exercises too. In addition, your Alumni Coach will read and provide feedback to you on your exercises.

## Privacy and Confidentiality

You have control over who sees the content you produce for our course through the use of the privacy settings on our community Web site. In addition, the Wharton Code of Ethics addresses the issue of how to manage information available to you as a student:

*The Wharton student is expected to respect the materials, data, and property of other members of the Wharton community...The student will not misuse or misappropriate the materials, data, or other property of another, especially through, but not limited to...Divulging or distributing proprietary or confidentially provided information obtained for class assignments...*

## Responsibility for Preparation and Progress

The role of the instructor is to provide the structured set of activities for undertaking the TL exercises and to cultivate a learning community in which students are encouraged to grapple with relevant ideas and experiences in a systematic manner. For you to gain the benefits this course is designed to produce, it's essential that you participate actively in advancing course goals.

Because you work closely with others in our class, missed deadlines for exercises or absences from sessions create problems for your progress and the progress of others. If you are going to miss a session, or if you think you might miss an exercise deadline, please notify Prof. Friedman, our TA, and your coaching team prior to the deadline to make other arrangements. For fairness' sake, credit will be deducted for lateness. Missing a deadline without prior notice puts you at risk for failing the course.

For a session you must miss, to help you stay on track it's recommended that you interview a few classmates about that session and then send a note, within 2 days of the session, to Prof. Friedman and our TA about the essential content and takeaways. Required preparation includes readings. It is assumed that you have read the readings and are prepared to discuss them when you arrive at the class session.

It is understood that there might be extenuating circumstances that make it difficult for you to complete required actions on time and to attend classes. However, because each student's work affects others, course policy is that a student's persistent failure either to maintain timely progress on exercises or to attend sessions results in dismissal. If a student misses more than two classes without approval by the MBA Program Office, he or she automatically fails the course.