



# Leadership Compass: Deepening Perceptions of Self & Others

**Overview:** This workshop allows participants to identify with one of four primary work styles relevant to leadership and team work by encouraging them to delve more deeply into their strengths and weaknesses in all four styles. This workshop will enable participants to come to a deeper understanding of the way they work and will help them identify skills and weaknesses. It also is a tool for bolstering team accountability by pushing people to consider the way in which their style(s) affects other members of a team and how each person might change their personal work styles to balance a team or better fit a given work situation.

**Category:** Leadership development and problem-solving, team and personal management

**Level:** Advanced – this workshop is ideal for campus or community groups that regularly operate as a team and are committed to spending a good deal of time exploring those team dynamics

**Type:** Structured activities suitable for a lengthy setting (e.g. retreat or training)

## Focus or Goals of this Guide:

In sum, Leadership Compass is about:

- Developing a more balanced approach to personal work styles
- Understanding how each person's work style affects the rest of the team
- Deliberately building skills in all four directions to enhance personal and team performance

## Materials:

- Paper and pens/pencils for all participants
- *Leadership Compass Directions* handout (pg 11-13)
- Flip chart paper
- Markers
- Copy of Four-Fold Way (optional)

## How to Prepare:

Review the trainer guide and become comfortable with all information and activities. Walk through the workshop and revise it to fit your audience. In addition to preparing any case studies or scenarios, you should prepare a relevant introduction, including history, applications,

and context. You'll also want to prepare all materials (handouts and flip chart paper) – the facilitator should label individual pieces of flip chart paper with the following headings:

- Goals
- Three Questions To Determine Primary Direction
- Leadership Compass (and draw the compass)
- North (sub-headings “Approach” and “Overuse”)
- South (sub-headings “Approach” and “Overuse”)
- East (sub-headings “Approach” and “Overuse”)
- West (sub-headings “Approach” and “Overuse”)

Finally, set up your workshop space to be comfortable and welcoming for participants.

### How to Do/Brief Outline:

The total suggested time for this workshop is 3.5 hours (modify as needed) and should be divided as follows:

- |                                    |                           |
|------------------------------------|---------------------------|
| 1. Introduction and Framing        | suggested time 10 minutes |
| 2. Goals and Expectations          | suggested time 15 minutes |
| 3. Review Four Directions          | suggested time 15 minutes |
| 4. Primary Direction Discussion    | suggested time 10 minutes |
| 5. Report Backs                    | suggested time 15 minutes |
| 6. Going To Extremes Discussion    | suggested time 15 minutes |
| 7. Rotate Through Three Directions | suggested time 10 minutes |
| 8. BREAK                           | suggested time 15 minutes |
| 9. Case Scenario                   | suggested time 15 minutes |
| 10. Case Scenario Processing       | suggested time 15 minutes |
| 11. Personal Maps                  | suggested time 20 minutes |
| 12. Team Sharing of Personal Maps  | suggested time 30 minutes |
| 13. Pairs: Commitments To Change   | suggested time 15 minutes |
| 14. Wrap-Up                        | suggested time 10 minutes |

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## 1 Introduction and Framing

Suggested time: 10 minutes

Introduce the basic concept of the exercise and its history. Perhaps show the book The Four Fold Way.

### History

The Leadership Compass draws from a Native American Indian-based practice called the Medicine Wheel or the “Four-Fold Way.” In the book The Four-Fold Way, the four directions are described as warrior (north), healer (south), teacher (west), and visionary (east). All directions have profound strengths and potential weaknesses, and every person is seen as capable of growing in each direction. Each direction has a primary “human resource,” including power (north), love (south), wisdom (west), and vision (east) as well as primary struggles associated with loss or difficulty. Each person can access the gifts associated with each direction – through work, ritual, and a variety of practices – in order to become a more well-rounded person. Nonprofit organizations modified the original framework and language to be more suitable for the professionally-oriented cultures of organizations.

This workshop builds on the Leadership Compass framework to allow individual participants to dig deeper into their perceptions of themselves and the team. This workshop pushes the notion of the "learnable" qualities of each direction, when a person adopts a willingness to learn and change.

Ask participants to put aside their misgivings and allow themselves to go with the categorizations of the exercise. Some important introductory comments are as follows:

- This is a diversity exercise that introduces a framework of four "directions" ~ representing qualities of work styles. When appropriately incorporated, the diversity of our work styles can be a great source of productivity and creativity; when inappropriately understood or incorporated, this diversity can bring about a lot of misunderstanding, tension, and confusion.
- For our purposes, we will be concentrating on the leadership directions (or categories) in which we personally use at work, particularly at work in community service efforts. Please answer and evaluate your responses in terms of how you currently approach your work.
- One style isn't better than any other. In fact, this workshop will allow us to look more deeply at the primary leadership style we each use at work. All of the styles offer different strengths and different potentials for improvement.
- You may find yourself critical of the categorizations or wary of having to reveal things about your own work styles. We request that you withhold judgments about the usefulness of the exercise as you go through it, and give this exercise a chance. We are confident you will find it useful.
- [You may also want to introduce some of the history of this activity (see above).]

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## 2 Goals and Expectations

Suggested time: 15 minutes

The goals of this are:

- To develop a more balanced approach to personal work style development
- To build an understanding how each person's work style may affect the rest of the team
- To build skills in all four directions in order to enhance personal and team performance

Make sure to introduce some ground rules for the activity:

- Again, please reserve misgivings about the exercise until the end.
- During the course of this exercise, you will each identify a primary way in which you exercise leadership. This is not meant to strictly categorize you, but to give you a starting place at which you can learn complementary skills in order to round out and expand your leadership abilities. You may be tempted to tell all of us that you aren't *always* "south". It's normal for people to feel that they have qualities of all of the sides, so it's not necessary for you to explain yourself at every step. Stick with the exercise, which will allow each of us to later explore and discuss our many sides.
- Observe basic group facilitation/setting guidelines.

### 3 Review Four Directions

Suggested time: 15 minutes

You, as the facilitator, should have the flipchart paper with each of the directions from the "approaches to work/work style" section of the handout listed (do not have the "overuses" or other elements visible at this point).

Present the following questions for participants to reflect on:

1. **What's your first inclination when you get a new project?**
2. **How do you react under pressure?**
3. **What feedback have you been given about yourself previously?**
4. **Which direction seems to best describe you?**

Based on these the four pieces of flipchart paper posted, which describe the approaches to work/work style for each direction, ask participants to consider their PRIMARY ANSWER. Of course, answers always change depending on circumstances and situations. However, in order to move into the heart of this workshop, participants should think about the primary way in which they operate. WHEN ACTING AS A PROJECT DIRECTOR OR STUDENT LEADER, keep in mind that many of us work in all of the directions at different times.

Have participants write down the direction that – initially – seems to best fit them. These answers will help everyone identify a leadership "direction" the most often describes their leadership style. Again, remind people that later in the workshop, people will explore skills from other directions/styles.

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### 4 Primary Direction Discussion

Suggested time: 10 minutes

After everyone is finished writing, have people move physically to one of four areas that represents their primary direction. Explain that in those directions, people will have the opportunity to discuss their styles in more detail.

OR: In a smaller, more intimate group where people know each other well, have the other group members tell each person which direction they think s/he is most similar to. This way, each person in the group will understand how others perceive them. Each person ultimately has the last say about which direction s/he personally associates him/herself with, but the feedback from the other group members could be useful. This alternative takes longer than having each individual decide alone.

Give people a designated amount of time (suggest 8 minutes) to discuss the following:

- **What's really great about being your direction?**
- **What's really hard about being your direction?**
- **What's difficult about working with the other directions?**

In those discussions, people can recognize that although they are at the same "primary" direction, they have different responses to these questions. Make sure to inform groups that someone should keep notes and be prepared to summarize what the group discusses.

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## 5 Report Backs

Suggested time: 15 minutes

Ask each group to offer one report of their responses to the above three questions. You may want to ask that no group speaks twice until every group speaks once.

After all groups have given their complete report allow for *some* direct questions and conversation between the groups. You can ask, "Does anybody want to ask anything of anyone from one of the other directions?" You can also ask the group for their observations or note some of your own. Keep a professional tone and pace and discourage participants from criticizing the other directions or from name-calling. Try to bring out interesting questions and points of agreement/difference.

Provide an opportunity for anyone who thinks that they're in the wrong direction to move to a new direction.

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## 6 Going to Extremes Discussion

Suggested time: 15 minutes

This portion will encourage people to focus on how their style might be misunderstood, conflict with others, or be taken too far in a group dynamic. This should raise participants' awareness of the "balancing" of different styles.

Give the groups **five minutes** to focus on the following question:

- **When you take your direction to an extreme, or are inflexible with your style, what do you think people who associate with the other directions think about working with you?**

Ask groups to brainstorm their responses. Have each group report to the group what they say.

Then, go around the room and flip the charts to reveal the "OVERUSE" portions for each direction. You can introduce them by saying: "Take a look at these charts. You may recognize that some of these items came up in your group. Some may be new."

Encourage groups to discuss their thoughts on the overuse of their direction (give a few minutes for this conversation). The discussion of OVERUSE of styles is a good lead-in to the next part, which is a focus on how one can balance one's styles.

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## 7 Rotate Through Three Directions

Suggested time: 10 minutes

Now you want to really get the group moving. Ask everyone in the group to get up and move to their SECONDARY direction - the approach that each person feels s/he is second most likely to use in leadership situations.

Give them 30 seconds to move. Ask everyone to look around. Take a few comments or ask a few questions -- e.g. point out who moved "across" (west - east, north - south) and who moved "around" (west - south, west - north, north - west, north - east, and so on).

Now ask the group to move to their THIRD style. Give them 30 seconds to move. Ask everyone to look around. Take a few comments or ask a few questions that might be relevant.

FINALLY ask the group to move to their FOURTH style (what they perceive as their weakest approach, or the one least likely to surface in a leadership situation). Give them 30 seconds to move. Ask everyone to look around. Take a few comments or ask a few questions. **TELL PEOPLE TO TAKE SEATS IN THIS DIRECTION.**

Close this brief round of movement by explaining that this exercise prefaces the next part of the workshop, which is to focus on developing strengths in all four sides.

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## 8 Break

Suggested time: 15 minutes

Invite everyone to take a 15 minute break to stretch and regroup. Ask everyone to return to the room after 15 minutes and to return to the place where they were at the beginning of the break (their fourth style).

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## 9 Case Scenario

Suggested time: 15 minutes

Choose a scenario that represents some typical work of the team. It's good to have elements in the scenario that will allow people to grapple with different approaches and styles. Explain that you are going to present a scenario, and you would like people to tackle it FROM THE PERSPECTIVE OF THEIR FOURTH (WEAKEST) STYLE (the one they are in now).

EXAMPLE SCENARIO (Write your own scenario that is relevant to the work the participants do):

You are leading a team to do an intensive, two-day community service project working with one of the voter registration groups in town, trying to register everyone in the town. Neither you nor anyone else in your group has ever done anything like this before. You and your team are completely on your own for this project; the registration group will provide you with any help that you need if you ask, but they offer little initial guidance. You must come up with an action plan and figure out who the best people are in your group to help you with the registration project.

Read the scenario out loud. Give people one to three specific questions to address in relation to the scenario, like:

- **"What questions do you ask? What information do you want?"**
- **"How do you handle this situation?"**
- **"Generate a proposal to..."**

Give people a designated time for discussion (5 minutes). Then take two-minute report-backs from each direction.

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## 10 Case Scenario Processing

Suggested time: 15 minutes

As facilitator, lead another round of report-backs to draw out the following information:

1. How did your group approach this?
2. What did you identify as the issues?
3. What did you decide/recommend?
4. What did you notice about how your group handled this situation?
5. How was it to work in your "weakest" direction?
6. Did anything surprise you about this?

Allow for *some* direct conversation after each group has given their complete report: "Does anyone have comments or observations to share? Did the various styles? Did your group's "leadership direction" seem to influence how the group approached this situation?"

This is where you can start to bring in questions about the team's ordinary work together:

- **Was it challenging to have to play out your weakest direction? What did you learn?**
- **Does this resemble or counter dynamics of your team? How? When?**
- **Does this make you think that you may have more of that direction than you thought?**

This leads in to the opportunity for each person to explain more about their person work styles.

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## 11 Personal Maps

Suggested time: 20 minutes

Pass out copies of the *Leadership Compass Directions* (found at the end of this guide). Explain that the next exercise is an opportunity for individuals and the team to more fully understand personal and team strengths.

### REVIEW THE FOUR DIRECTIONS:

Ask people to take 5 minutes to review the four directions. As they do so, ask them to go through all the directions and CHECK OFF characteristics they feel that they have (both regular and overuse).

### MAP INDIVIDUAL SKILLS:

Then, the participants map where they believe they belong in each of the four directions on a Cartesian grid. Explain that the farther from the center (5) represents the strength in that direction. Use an example, written out on a flip chart, to show the group (see example at the top of page 9 in this guide). Tell people not to be sidetracked by the "numbers" but to use their own sense of judgment. Have participants "connect the dots" in the form of an inner circle.

### SKILL IDENTIFICATION:

Ask people to jot down 3 TRAITS/SKILLS they have in each direction AND 3 TRAITS/SKILLS they would like to further develop.

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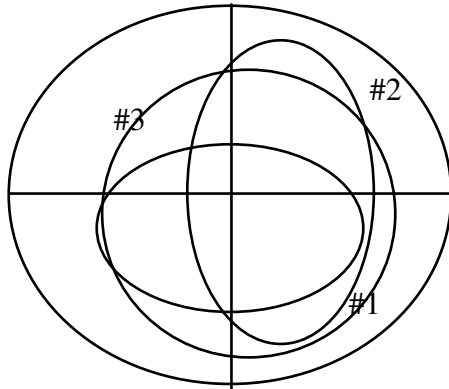
## 12 Team Sharing of Personal Maps

Suggested time: 30 minutes

Go around the group and have each person present their personal map to answer the following questions (put these on flipchart paper):

- (Main questions) **Why do you lead the way you do? Tell us more about why you identified the primary style you chose. When you did the whole map, did it change your sense of yourself at all?**
- Then also:
  - What are one or two things you think you do well in each direction? (Note: these can be improvements or reducing overuse tendencies)
  - What are the one or two things you would like to get better at in each direction?
  - Of all of those, what direction and what two qualities would you most like to develop this coming year?
- **Draw the team map and note everyone's skills and goals.** (Each person should only take one minute to list their skills and goals.) As people present, two facilitators (ask for an experienced volunteer or arrange beforehand for someone to join you) should MAP the whole team (using different color markers, draw what each person drew on a BIG FLIP CHART CIRCLE; then label each circle, each number representing a different participant's circle):

example



- Note (on separate paper) each person's name, skills, and goals in a grid like this:

GRID sample:

<u>Student's Name</u>	<u>1-2 Strong Traits/Skills in Each Direction</u>	<u>1-2 Traits/Skills to Learn in Each Direction</u>	<u>Overall BIGGEST GOALS</u>
Maria	North- motivator South- good listener West- pays attention to budget East- integrates big ideas with what students like	North- improve tendency to act too fast without info South- improve ability to say no West- improve overall attention to details East- get more visionary	Get more West and more East overall -- reduce tendency to bounce between counseling and acting; more orientation towards long-term big picture

- After all have presented, DRAW A WIDER LINE around the entire map (representing the furthest point for the whole TEAM).
- **Then, engage the team in a discussion.** You might lead it with the following questions:
  - ◆ Does this circle give an accurate representation of our team?
  - ◆ Does it surprise anyone?
  - ◆ Does anyone have questions for someone else in the group about their style or the skills they have or want to develop?
  - ◆ What does this make you think about the way we usually operate as a team? Are we operating as effectively as we could? How could the information we learned in these exercises help us improve?

## 13 Pairs: Commitments to Change

Suggested time: 15 minutes

Ask people to look again at the big team map and the grid. You can also introduce check-ins, (an informal way to get everyone's opinion), by introducing the following questions:

- **In what ways can each of you personally support your colleagues to develop in the way s/he described wanting to?**

Go around the group and have each person describe one thing s/he could do to help a colleague to grow in one skill.

**OR** introduce specific scenarios and have the team as a whole respond to them:

1. Given this situation, what would be your first impulse response? Would it be the most productive for you personally? For the team as a whole? For your group as a whole?
2. Given what we have learned and talked about, how might you personally or we as a team respond best (or better) to this situation?

If the discussion from this is rich, you might lead straight into the closing (skip the simple debrief at the beginning of step 14).

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## 14 Wrap-Up

Suggested time: 10 minutes

You can lead the group in a simple debrief by asking:

- What have you learned?
- What surprised you?
- How are you going to use this information? How might you use it with your own staffs and corps?
- At the beginning we said that this is a diversity exercise, now that we have completed the exercise why do you think it is classified this way?
- What concrete things might you do to develop more balance as a person or team? How has this been the beginning of skill building for you?

### Closing

You want to close the workshop with your own summary comments, take feedback, do evaluations, and/or lay out the next steps. (You will probably want to figure out some specific, concrete next steps for using this information as a group and give specific individuals follow-up roles in doing so).

# Leadership Compass Directions

To be used with Leadership Compass workshop

## 1 North

### Approaches to Work/ Work Style:

- Assertive, active, decisive
- Likes to determine the course of events and to be in control of professional relationships
- Enjoys challenges presented by difficult situations and people
- Thinks in terms of the “bottom line”
- Quick to act or make decisions; expresses urgency for others to take action
- Perseveres, not stopped by hearing “No,” probes and presses to get at hidden resistances
- Likes variety, novelty, new projects
- Comfortable being “in front”
- Values action-oriented phrases, “Do it now!”, or “I’ll do it”, “What’s the bottom line?”

### Overuse (Style Taken to Extreme):

- Can easily overlook process and comprehensive strategic planning when driven by need to act and to make decisions
- Can get defensive, argue, may attempt to “out expert” others
- Can lose patience, push for decisions too early, or avoid discussions to a significant extent
- Can be autocratic, want things done his/her way, has difficulty being a team member
- Sees things in terms of black and white, not much tolerance for ambiguity
- Gets impulsive, disregards practical issues
- Not heedful of others’ feelings, may be perceived as cold
- Has trouble relinquishing control - finds it hard to delegate, thinks, “If I want something done right, I have to do it myself!”

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## 2 South

### Approaches to Work/ Work Style:

- Understands how people need to receive information in order to act on it
- Integrates others’ input when determining the direction of what’s happening
- Value-driven regarding aspects of professional life
- Uses professional relationships to accomplish tasks, interaction is a primary way of getting things done
- Supportive of colleagues and peers

- Willing to trust others' statements at face value
- Feeling-based thoughts and actions; trusts own emotions and intuition; intuition regarded as "truth"
- Receptive to others' ideas, builds on others' ideas, team player, noncompetitive
- Able to focus on the present
- Values words like "right" and "fair"

**Overuse (Style Taken to Extreme):**

- Can lose focus on goals when believes that relationships or people's needs are being compromised
- Has difficulty refusing requests
- Internalizes difficulty and assumes blame
- Prone to disappointment when others see relationships as secondary to tasks
- Difficulty confronting or handling anger (own or others'); may be manipulated by emotions
- Can over-compromise in order to avoid conflict
- Immersed in the present; loses track of time; may not take action or see long-range view
- Can become too focused on the process at the expense of accomplishing goals

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## 3 East

**Approaches to Work/ Work Style:**

- Visionary who sees the big picture
- Generative and creative thinker, able to think outside the box
- Very idea-oriented
- Makes decisions by looking towards the future (insight/imagination)
- Insight into mission and purpose
- Looks for overarching themes and ideas
- Adept at, and enjoys, problem solving
- Likes to experiment and explore
- Appreciates a lot of information
- Values words like "option," "possibility," "imagine"

**Overuse (Style Taken to Extreme):**

- Can put too much emphasis on vision at the expense of action or details
- Can lose focus on tasks
- Poor follow-through on projects, can develop a reputation for a lack of dependability and attention to detail
- Not time-bound, may lose track of time
- Tends to be highly enthusiastic early on, but then burns out over the long haul
- May lose interest in projects that do not have a comprehensive vision
- May become frustrated and overwhelmed when outcomes are not in concert with vision

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## 4 West

### **Approaches to Work/ Work Style:**

- Understands what information is needed to make decisions
- Seen as practical, dependable and thorough in task situations
- Provides planning and resources, is helpful to others in these ways and comes through for the team
- Moves carefully and follows procedures and guidelines
- Uses data analysis and logic to make decisions
- Weighs all sides of an issue, balanced
- Introspective, self-analytical, critical thinker
- Skilled at finding fatal flaws in an idea or project
- Maximizes existing resources - gets the most out of what has been done in the past
- Values word like “objective” and “analysis”

### **Overuse (Style Taken to Extreme):**

- Can be bogged down by information, continues doing analysis at the expense of moving forward
- Can become stubborn and entrenched in a position
- Can be indecisive, collect unnecessary data, become mired in details, “analysis paralysis”
- May appear cold, withdrawn, with respect to others’ working styles
- Tendency to remain on the sidelines, watchful, observing
- Can become distanced from other people
- May be seen as insensitive to others’ emotions
- May be resistant to change