

RESOURCE 1

Life timeline

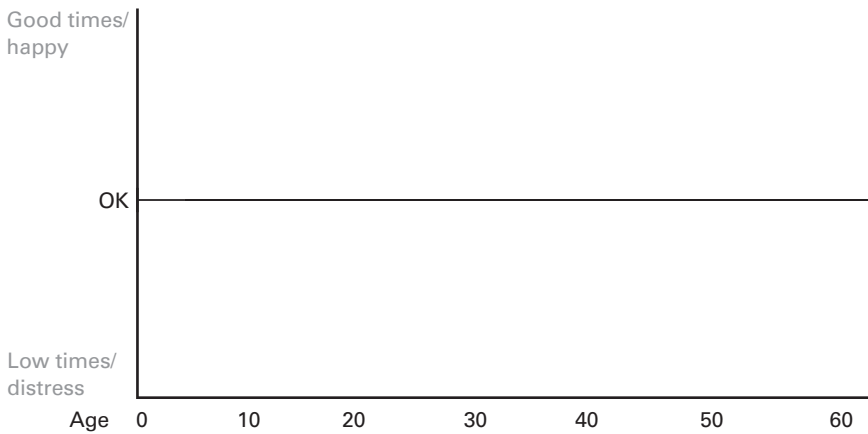
This exercise will bring to your awareness some of the events that have influenced your personal development to date and will also flag what your values are. However, be aware that as you move through the journey of life your values may change, which is why keeping in touch with your values is a life-long journey. You need to think about your personal and professional life experiences, how you have dealt with difficult and sad times and with elated and happy times such as when you felt proud, self-fulfilled and satisfied. Identify when you really felt good and confident that you had made good choices.

A word of warning: this exercise can provoke some deep feelings that you may want to be prepared for and please take care and only engage with this exercise in a way that feels safe for you. For the purpose of this exercise, I suggest you make it with particular reference to your professional work life but you can use it in whichever way it works for best for you.

Exercise: Complete the 'Life timeline' like a graph by plotting major events that have a meaningful impact on your life, indicated by an 'X'. The bottom horizontal line is for your ages throughout your life and the middle horizontal line is the 'I'm OK'. The vertical line is the continuum for good times when you felt happiest at the top, to the low times where you felt distressed at the bottom. Positive happy experiences will be plotted above the 'OK' line and negative events below the line. You could include, family, births, deaths, marriage, divorce, achievements, education, jobs, work, people you have worked with. Complete your graph in 10–15 minutes without thinking too hard about it. Label the events as you plot them, then join the Xs up. Once you have completed your 'Life timeline' you should reflect on it and note the important ideas, people and experiences that have influenced you and what you can learn about yourself from it. For example:

- What are your values – what matters to you the most?
- What influenced the paths you took and the decisions you made?

- Who have been significant role models and why and how did they influence you?
- Did your resilience grow through your experiences?
- Looking at the low or negative moments, is there anything that you could have done differently?
- How have you dealt with your emotions and the emotions of others?
- What are the three key things that you take away from this exercise?

Figure A1

RESOURCE 2

Example person specification

The following is generic and an accumulation of every assistant-type role to let you know what is possible, although it is not exhaustive.

- Job title:** All encompassing 'assistant' and team leader. The position is busy, varied and demanding so candidates should be appropriately qualified and experienced.
- Reports to:** CEO.
- Responsible for:** Assistant duties to the CEO and leading/supervising a team of assistants.
- General purpose of role:** To provide a confidential and efficient assistant support service to the CEO. To effectively lead a team of assistants working for various line managers.

Person specifications normally include essential and desirable qualifications, training, experience, attributes, skills and abilities and some specifications may even include how they will be measured, such as by application (past experience), by being tested either psychometric or practical or via the interview questioning.

ESSENTIAL CRITERIA	DESIRABLE CRITERIA
EDUCATIONAL REQUIREMENTS High level of education. (Be more specific depending on your country's qualifications.) Expert level written, verbal and communication skills.	Secretarial/administration qualifications/degrees/diplomas. Business degrees/diplomas. Management degrees/diplomas.

ESSENTIAL CRITERIA**DESIRABLE CRITERIA****EXPERIENCE**

Previous experience in an administrative/secretarial/office management role (depending on what role and level of job you are advertising).

Staff supervision/management experience.

Experience of working within a professional office.

Member of an assistant network (outside work on own volition).

PROFESSIONAL/TECHNICAL AND OCCUPATIONAL TRAINING

Accurate touch typing and keyboard skills – at least 60wpm with a minimum of 95% accuracy.

Undertake a complex range of document creation and presentations, including emails on behalf of yourself and your boss, statistical and narrative reports, executive summaries, agendas etc – many of which will be drafted and generated on one's own initiative.

Up-to-date experience of Microsoft Office applications including OneNote, PowerPoint, Outlook, Excel.

MS Word advanced knowledge including knowing how to use track changes, insert tables of contents, use styles, mail merge, screen shots and create hyperlinks, etc.

Ability to become proficient with organization specific programs and software.

Ability to research any new technology and apps and be aware of and become expert user in some of the plethora of appropriate apps and the ability to teach these to others (eg Monday.com, Asana, Trello).

Excellent at spelling and grammar.

Proficient at taking minutes of meetings, including board meetings, plus related pre-meeting with Chair.

Taking instruction/dictation either on the phone or direct using shorthand or longhand with short forms or speedwriting.

Reading, monitoring and responding to correspondence.

Social media savvy – good understanding and ability to effectively use social networking tools (for example LinkedIn and Twitter) to promote business services and develop relationships.

Ability to research artificial intelligence and see how you could incorporate this into your role. Learn how to monitor and take care of any AI introduced.

Marketing knowledge.

Comfortable use of keyboard short cuts to save time.

Evidence of own continuing professional development.

Experience of using spreadsheets and formulas.

Having the curiosity and willingness to keep learning and up-skilling on all office and technological programs including technology like cloud computing and digital board meeting documents.

ESSENTIAL CRITERIA

Proofreading plus the ability to grasp and comment on the larger concepts of the business meetings and the documents you create.

Understand overall department priorities and goals, and align schedules and meetings accordingly.

Expert at using the internet and the intranet.

DESIRABLE CRITERIA

Taking part in board meetings such as owning an agenda item for administration.

Shorthand or speedwriting.

Writing newsletters and ability to use Microsoft Publisher/Visio.

Ability to update websites and intranet sites and possibly be involved with their creation.

SKILLS/KNOWLEDGE/ABILITIES: Specific responsibilities

Assistant to the CEO.

Experience of liaising with senior executives of own and other organizations, with the ability to articulate and communicate to all levels.

The ability to manage projects – big and small.

Exceptional interpersonal skills – greet, meet and deal with clients and visitors.

Ability to work with a diverse group of colleagues who may be located in different time zones and different locations.

Act as the point of contact among executives, employees, clients and other external partners.

Collating information from different sources and managing information flow on a timely basis.

Coordinating printing and binding requirements.

Vetting and booking appropriate restaurants and venues.

Ensuring the policies, procedures, laws and regulations are followed.

Excellent organizational skills/administrative skills.

Coordinate and organize the calendar including internal and external meetings and attendees.

Understand different management and work styles and work with them; eg if you have a detailed boss then make sure you have all the information and back-up papers; if you have a 'big-picture' boss then only go into a meeting with one sheet of bullet points to discuss and a very small pile of paper, if any at all, etc.

Ability to work with internal and external VIPs in a cool, calm and collected manner.

Exceptional observational skills – notice what you notice.

Ability to summarize.

Ability to analyse information.

Own a full driving licence – attend venues, meetings.

Able to look after budgets.

Keep up to date with the latest office gadgets and industry practices – and teach others how to use them.

Bilingual/multilingual.

Capable of competently dealing with situations in the boss's absence.

Have strengths and become an expert in areas to complement your boss's weaknesses.

ESSENTIAL CRITERIA	DESIRABLE CRITERIA
Preparing meeting papers, itineraries and maps etc.	Being practical – being able to use and fix
Organize travel arrangements including visas/money/preparing a few foreign phrases/preparing complex travel itineraries.	equipment eg photocopier, coffee machine, binder, data projector, etc.
Travel with executive when appropriate.	Adviser, confidante and sounding board.
Gatekeeper and gateway of an executive's calendar and time.	Endeavour to develop the business whenever networking externally.
Experience with organizing events, conferences and seminars, liaising and negotiating costs with venues and suppliers.	Find ways to work smarter not harder.
Excellent communication skills with good command of language (verbal and written) – knowing when to speak up and having the courage to do so; knowing when to keep quiet and having the common sense to do so.	Be prepared to expand your knowledge whenever and wherever you can by being curious, reading what your bosses read, reading industry magazines and researching information, reading articles, books, purchasing subscriptions for specific EA material and magazines.
The ability to build rapport and relationships with all staff, but especially your boss and your team.	Create an internal network of assistants, whether face-to-face, virtual or hybrid. Volunteer to present or chair meetings, organize lunch and learn events etc.
The ability to use critical thinking skills in order to be able to 'connect the dots', by being curious, analyse and identify any communication/cognitive biases and find solutions.	
Ability to negotiate, debate and rationalize.	
Always use active listening and effective questioning techniques.	
Understanding of business/commercial awareness gained from study, experience or both.	
Being strategically aware and aligning goals with the boss and the strategy, vision and mission of the company – create stretched goals.	
Be aware of how PESTLE affects the company (Politics, Economics, Social, Technology, Legal and the Environment).	
Organizing, managing and maintaining office, including establishing and reviewing filing, bringing forward reminder systems and office systems.	
Daily management of emails including using rules, colours, folders etc. The filing should emulate the hard-copy filing and your colleagues should understand the filing system in case of your absence.	

ESSENTIAL CRITERIA**DESIRABLE CRITERIA**

Undertake personal work/errands as requested – possibly even organize personal events.

Answer incoming calls and take/forward messages.

Well-developed, well-mannered, telephone skills and etiquette – dealing with queries and routing calls appropriately.

Act as a reliable anchor point; establish good staff and client relationships; excellent client-care skills.

Actively seek ways to improve the efficient running of the office.

Stationery ordering/management.

Day-to-day management of office accounts and petty cash.

Deal with expenses, billings, credit control.

Design, implement and monitor office processes and procedures to ensure best practice and consistent approach/delivery.

Updating and maintaining client contact database.

Dealing with the press and writing press releases, ensuring bank of photos and digital photos are up to date and in the correct format for different media.

Ability to prioritize and organize workload with strong time management skills and self-motivated – ability to work to deadlines and under pressure.

Prioritizing and being able to focus on one task at a time and getting that done whilst bearing in mind what else is required next.

Having the ability to delegate effectively to distribute workload and also to help develop others.

Ability to maintain confidentiality, be discreet and squash gossip but at the same time appropriately be the ‘eyes and ears’ of your boss.

Able to work in changing circumstances and adjust working practices as required.

Share knowledge with other departments to avoid ‘reinventing the wheel’ and to keep them informed.

Keep an up-to-date worksheet of everything you do, enabling anyone to step in and do your job in your absence.

ESSENTIAL CRITERIA**DESIRABLE CRITERIA**

The ability to effectively cultivate networks both internal and external for the good of yourself, your boss and your team.

Network with other assistants in order to build relationships, collaborate, schedule meetings, prioritize critical path items, solve problems, and obtain information to ensure smooth day-to-day operations.

Manage your time, 'to do' or task lists effectively, working on the important and preventing things from becoming urgent wherever possible.

Act as an ambassador for your company and represent your boss on the phone and face-to-face.

Being able to ergonomically assess your workstation whether in office or remote working and making sure health and safety rules apply.

SKILLS/KNOWLEDGE/ABILITIES – TEAM LEADER/SUPERVISOR SPECIFIC

The ability to lead office operations and manage people whether working a flexible and hybrid working environment, from home/remotely and/or in the office.

Oversee the performance of colleagues whether face-to-face or remotely.

Able to work in a team as well as independently and able to get on with people.

The ability to practise leadership skills; eg be visionary, set an example, understand your values, strengths and weaknesses, understand your team, know how to motivate them, establish policies and procedures, establish a team charter and an effective balanced team, think strategically.

The ability to work closely with other departments such as finance, legal, IT to ensure smooth operations and to deliver on budget.

Be prepared and plan ahead; for example organize rotas.

Healthy attitude to a work–life balance.

Ability to coach, mentor and motivate team members and discipline where appropriate.

Excellent conflict management skills, diplomatic and the ability to handle grievances and difficult people.

Aware of different cultures and etiquette, including handshake and swapping business cards – advising boss where appropriate.

Understand different personality types and know how to interact with them for the most effective outcomes.

ESSENTIAL CRITERIA**DESIRABLE CRITERIA**

Ability to respond not simply react.

Able to express appreciation of team members and be nurturing.

Organizing and chairing team meetings, including setting the agenda, liaising with the minute taker before and during the meeting; keeping control of the meeting on a timely basis and eliciting everyone's involvement.

Manage a team of assistants, ensuring day-to-day workload is efficiently and effectively monitored and fulfilled.

Conducting appraisals, helping to set strategic 'SMARTER' goals and objectives.

Staff onboarding, including creating and updating standard operations procedures binders.

Maintain holiday and absence records, conduct 'back to work' meetings for long or regular absences where appropriate.

Recruitment – advertising, interviewing etc.

Organizing orientation and onboarding training for new employees.

Organizing training and team-building activities.

Firm and fair – the ability to discipline.

The ability to give and receive effective feedback/feedforward.

Maintaining appropriate cover and resources during staff absence.

Be the liaison person between boss and management and employees.

Be ready to step in and take over projects for your boss, take over meetings of your boss and be the 'face' of your boss.

Help to make work fun!

PERSONAL ATTRIBUTES/APPEARANCE

Strong communicator with the ability to work well across different team functions, different experience levels, different hierarchical levels within and outside of the organization.

Ability to work under pressure and to deadline.

Tolerant and forgiving.

Act as a confidant.

Have a collaborative outlook in order to get work done.

ESSENTIAL CRITERIA	DESIRABLE CRITERIA
Be sensible, level-headed and use common sense in everything you do and practise emotional intelligence.	Have a passion for the work they do.
Listen to your inner 'positive coach' and get rid of your now useless 'negative gremlins' (your negative self-talk).	Open-minded with a willingness to try new things.
The ability to read body language and use your own body language to influence and persuade using subtle matching and mirroring, pacing and leading.	Willing to get out of their comfort zone to learn and 'stretch' themselves.
Be proactive as opposed to reactive wherever possible.	Be someone who makes things happen.
Accurate attention to detail.	
Sociable, friendly, amiable and supportive.	
Keen to be effective – doing the right things; and efficient – doing things right.	
Be loyal and true to yourself and your boss/ company.	
Honest, trusting and trustworthy.	
A positive, optimistic and cheerful approach.	
Approachable, professional, friendly and respectful.	
Have an enthusiastic, flexible and adaptable approach to work.	
Outgoing and sociable personality with a sense of humour.	
Resilient and assertive.	
Smart professional appearance, projecting a professional image.	
Achieving and maintaining a positive can do/will do attitude and want to constantly expand knowledge and be the best you can be.	
Able to use own initiative, practical, thinking on your feet and responding to urgent situations.	
Be calm and confident, self-assured and able to deal with pressure and to the extent it does not turn into stress.	
Willing to get out of your comfort zone, keen to learn and willing to volunteer for projects.	
Enthusiastic, determined, diligent and tenacious.	
Able to make well-informed decisions.	
Punctual, dependable and reliable.	

ESSENTIAL CRITERIA**DESIRABLE CRITERIA**

Empathetic, thoughtful, sensitive and tactful – being aware of your surroundings, colleagues, office politics etc.

Research and preparing quality research documents.

Able to identify and foresee problems, analyse the relevant facts and information and suggest effective solutions.

Able to accept responsibility, demonstrating flexibility and pride in delivering work of the highest quality.

Creative and resourceful.

The ability to work well within a team, sharing knowledge, working collaboratively.

Exemplary values, courteous, patient, polite and well mannered.

ADDITIONAL RESPONSIBILITIES

Any other duties as requested.

RESOURCE 3

Example questions for recruiting

(Reproduced with the kind permission of Adele Woodward.)

- 1** Please give me an example of when you have had to manage a project/ piece of work, over a period of time, to meet specific requirements.
- 2** Please give an example of when you've had to deal with two conflicting priorities/client matters.
- 3** Please give me an example of when you have developed a relationship with a member of a team/department outside your own (within your organization).
- 4** What are the set standards/best practices that apply in your current job?
- 5** Please give me an example of a new skill or specialist knowledge that you have obtained.
- 6** Please give me an example of two situations in which you have had to communicate in very different ways.
- 7** Please give me an example of when you have had to alter your communication style to ensure others understood/accepted what you were trying to convey.
- 8** How do you go about setting standards for/measuring the quality of your work?
- 9** How do you go about ensuring you fully understand your (internal or external) client's business and operating environment?
- 10** Please give me an example of when you have worked with a colleague who had a different working style from you. How did you handle it?
- 11** Tell me about a problem that a colleague has brought to you recently.
- 12** Can you give me an example of when your manager was absent and you were forced to make a decision? What did you take into consideration? What was the effect of your decision?
- 13** Tell me how you prioritize your day.
- 14** Give me an example of how you have responded to a colleague who seemed overworked or stressed.

- 15 What IT packages do you use on a day-to-day basis?
- 16 Can you give me an example of when you have used PowerPoint to enhance a presentation. What was the length of the presentation? Were you required to use Advanced PowerPoint features?
- 17 Have you used an in-house finance package before? What did you understand about its purposes?
- 18 Can you give me an example of when you have had to use Excel as part of your job? Did it require the use of complex formulae?
- 19 What systems do you have in place to enable other people to pick up your work in your absence?
- 20 Tell me about a time when attention to detail was critical to the success of a task. How did you achieve this?
- 21 Give an example of where you have had to organize the diary or commitments of other people.
- 22 What do you do when your time schedule is upset by unforeseen circumstances? Please give examples.
- 23 Tell me about what you did the last time you had a personal backlog at work?
- 24 How do you keep abreast of developments in your organization?
- 25 Tell me about a time when you have had to organize the travel arrangements, accommodation and/or conferences for others.
- 26 Have you had to arrange events with budget constraints? What did you do and how?
- 27 Give me an example of a time when you had to adapt to a changing environment. How did you do this?
- 28 How do you think external factors affect your team?
- 29 Give me an example of when you have worked as part of a team to reach a common goal.
- 30 What is the best example of teamworking you have been involved in? Why? What was your contribution to the team?
- 31 Tell me about your most successful working relationship. What did you do to make this successful? Have you ever had to work with someone who was not good at his/her job or was difficult? What did you do about it?
- 32 Give an example of a time when you have had to encourage others to contribute to the effectiveness of the team.

- 33 Can you tell me about a time when you had to support another team member?
- 34 Have you had to manage the performance of others in the workplace? How did you accomplish this?
- 35 How have you actively developed your skills in your previous roles?
- 36 Give an example of when you delivered something beyond what was required.
- 37 What achievement are you most proud of and why?
- 38 How have you updated your skills since leaving college/school?
- 39 Tell me about a time when you have had to encourage a colleague.
- 40 How do you adapt to different personalities?
- 41 Give me an example of how you dealt with a confrontational situation.
- 42 How do you think your work colleagues view you?
- 43 What sort of correspondence do you draft yourself and what checks are made on it before sending it out?
- 44 Tell me of a time when you suggested something which was not initially accepted. Did you manage to change other people's minds, and if so how?
- 45 Can you give me an example of when you have had to communicate with people on different levels?
- 46 What is the most complex problem you have had to deal with in the workplace? How did you approach it? What was the outcome? What did you learn from this?
- 47 What sort of decisions do you take in your job at present? Which ones do you consult your manager on?
- 48 What were the steps you took in deciding to choose your career/last job?
- 49 Was there a time when you identified a potential problem before it became an issue?
- 50 Can you tell me about a time when you had to deal with a complex problem and what range of solutions did you identify?
- 51 What people or methods do you use when solving problems?
- 52 How do you find working to deadlines?
- 53 Tell me about your most challenging deadline.
- 54 Give me an example of when you had to deal with conflicting priorities.

- 55 Can you tell me about a time when an increase at work required you to seek support from a colleague? Who did you go to, and how did you approach the situation?
- 56 Can you give me an example of when you have had to anticipate a need or deadline and what you did to ensure it was met?
- 57 When have you gone out of your way to provide a good service?
- 58 How do you promote good working relationships in the office?
- 59 How do you gauge client satisfaction in your role?
- 60 How do you balance the difference between important and urgent tasks?
- 61 Can you tell me about a time when attention to detail was critical to a piece of work?
- 62 Can you tell me about a time when you have faced an opportunity to enhance the service to the client?
- 63 How do you build and maintain relationships with clients?
- 64 In your previous/current role, describe a situation where you have been faced with a problem and had to make a quick decision.
- 65 Can you give an example recently when you have had to work with difficult or challenging people?
- 66 What do you feel your strengths are and why?
- 67 In your previous/current role can you describe a time where you have had to organize a number of different tasks all in a short space of time? (How was this prioritized?)
- 68 Can you give me an example of where you have helped out another team or department?
- 69 Who are the main competitors/rivals to the company you most recently worked for?
- 70 Tell me about a time when something didn't quite work out for you or went wrong in some way. How did you feel and how did you handle it?
- 71 Tell me about a weakness you have, what is it and what are you doing about it?
- 72 Give examples of what you have done for your own self-development. Have you arranged anything for your own self-development out of work?
- 73 Do you belong to any assistant networks; if so how involved are you?

RESOURCE 4

Coaching questions

What is it that you want? What would be your ideal outcome?
Feel, hear and see what it is you want in your mind's eye.

Identifying options: *So now you know what you want, answer these questions*

- 1 What specifically have you done so far? What worked and what didn't?
- 2 What do you have already (eg skills and resources) that could move you forwards?
- 3 What research could you do to help you find the first (or next) step?
- 4 What do you need to do before you do anything else?
- 5 Who else could you ask for help in achieving your goal?
- 6 If you were at your best, what would you do right now?
- 7 What would you do if you were an expert in (the area of your goal/problem)?
- 8 What would you advise your best friend to do if they were in your situation?
- 9 What would your best friend advise you to do?
- 10 What would (someone who inspires you) do in your situation?
- 11 If you had a choice what would you do?
- 12 What if you had as much time as you needed?
- 13 What if money were not an issue?
- 14 Imagine you're fully confident in your abilities; what could you do?
- 15 Imagine you're fully confident that others will support you. Now what could you do?
- 16 What other angles and options have you not thought of yet?

- 17 What is an impossible option?
- 18 What is the decision you have been avoiding?
- 19 If you (secretly) knew the answer to getting unstuck, what would that be?

Limiting beliefs: *To challenge unrealistic or exaggerated attitudes and beliefs and to help you explore alternative perspectives*

- 1 Where does the reaction/belief come from?
- 2 In what way may you be sabotaging yourself?
- 3 How do you know that is a correct interpretation?
- 4 How is that belief helping?
- 5 What could be a different interpretation?
- 6 How might ... see the situation?
- 7 What is stopping you?
- 8 What pressures do you put on yourself?
- 9 How could you view it differently?

Under-used resources and possibilities: *To challenge you to acknowledge your strengths and to surface underused resources and explore possibilities for achieving your goals*

- 1 What are your unused skills/resources?
- 2 What are your current strengths? What else? What else? What else?
- 3 What opportunities do you let go by?
- 4 What ambitions remain unfulfilled?
- 5 What could you be doing that you are not doing?
- 6 What are you failing to accomplish – what opportunities do you need to be developing?
- 7 What role models could you be emulating?
- 8 What could this opportunity look like if you developed it?
- 9 What are the possibilities for a better future?

- 10 What are some wild possibilities for making your life better?
- 11 If money/time/resources were no obstacle, what options might you choose?

Blockers and enablers: *To establish what you perceive will help or hinder the achievement of goals*

- 1 Where does the reaction/belief come from?
- 2 What is getting in the way?
- 3 What is stopping you?
- 4 What are the main barriers?
- 5 What is going well that you can build on?
- 6 What are the pressures on you now?
- 7 What are your fears about making change?
- 8 What do you find comfortable now that may be holding you back?
- 9 What are the benefits to you of making this change?
- 10 What are your concerns if you don't do anything?

Motivation: *To define the gap between the current and preferred situation and to clarify goals*

- 1 What would this problem look like if you were managing it better?
- 2 What would make this time well spent for you?
- 3 Tell me how you see things at the moment.
- 4 What needs to be resolved?
- 5 What do you really want?
- 6 What would you like to achieve today?
- 7 What is troubling you?
- 8 How would you like things to look a year from now?
- 9 How would you like things to be different?
- 10 What are your concerns?

Implementation: *To give realistic encouragement and feedback and help with resources as necessary*

- 1 What worked well for you?
- 2 What didn't work well for you?
- 3 What's not gone according to plan?
- 4 What has been unexpected?
- 5 What might you consider doing differently next time?

Review: *Progress and learning*

- 1 How can we use the remaining time most effectively?
- 2 What do we need to refocus on?
- 3 What are you prepared to do differently?
- 4 Are we dealing with the key areas?
- 5 How are you doing?
- 6 What new insights have you gained?
- 7 What area do you feel would be most beneficial to address now?
- 8 What have you learned from the process?
- 9 How will I know you've completed your action/s?

Commitment: *Do something – explore strategies for accomplishing goals, choose the best fit strategy and formulate an action plan*

When specifically will you do your action/s? Include the day and time.
On a scale of 1 to 10, how likely are you to complete each action? If it's below an 8, then ask what is stopping you from completing the action – and make this your first action.

- 1 How do you normally sabotage yourself – and what will you do differently this time?
- 2 How will I know you've completed your action/s?
- 3 Who will you tell about your actions (to support you in completing them)?

- 4 What specifically will you ask your supporters to do for you?
- 5 Tell me how you'll feel once you have completed your actions.
- 6 How will you reward yourself when you complete your actions?

Taking action: *Look at the list of ideas and options you now have*

- 1 What are some of the things you might do?
- 2 How might you minimize obstacles?
- 3 How many different ways are there to accomplish what you want?
- 4 What would be the smallest or easiest first step for you?
- 5 Which options or actions grab you?
- 6 How could you make the tasks/actions more enjoyable or fun?
- 7 What might be some unintended consequences of these actions?
- 8 What data will you need to collect as feedback as you move forward?
- 9 Who else could help you in completing your actions?
- 10 What's one action you could take in the next 10 minutes?
- 11 What are three actions you could take that would make sense this week?
- 12 Where do you go from here?
- 13 On a scale of 1–10, what is your level of commitment to your plan?
- 14 What's next – what steps are involved?

RESOURCE 5

Wheel of Learning Motivational Tool

Imagine you have achieved your goal in each area and write down a brief description for each category as if you were feeling total satisfaction and achievement. Imagine what it would look like, feel like and what you would hear if each category was marked with a 10!

Your brain does not know the difference between a truth and a lie and once you have told it you have achieved something, knowing what it feels, looks and sounds like (using all your senses to really feel like you have achieved your goal) then you will be more able to achieve it for real.

Category	Description of total satisfaction
Resilience	
Negotiation	
Project management	

Category	Description of total satisfaction
Emotional intelligence	

RESOURCE 6

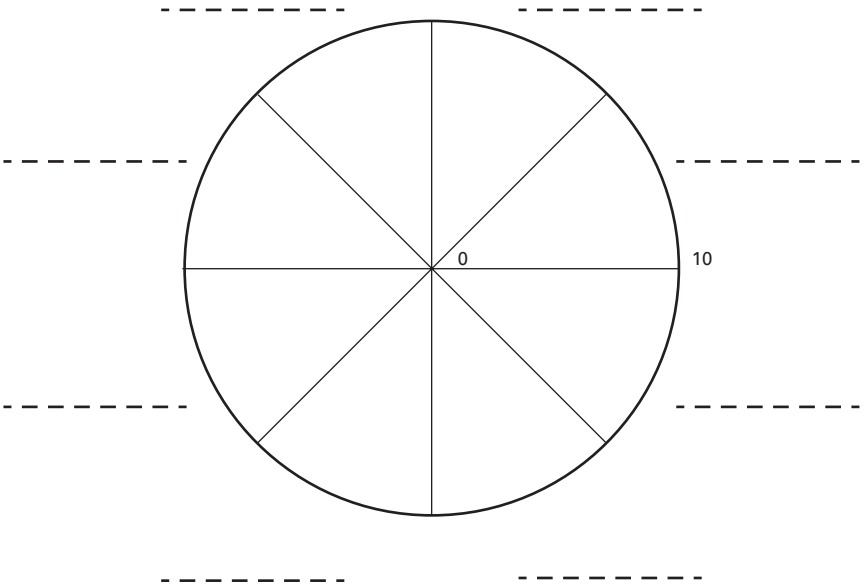
Blank Wheel of Learning – to use creatively

TITLE: _____

Examples: ‘Competency Wheel of Learning’; ‘Action-planning Wheel of Learning’; Negotiation Wheel of Learning; Performance Management Wheel of Learning; Resilience Wheel of Learning etc. Once you have decided on the subject of your Wheel of Learning then you can put a topic on each spoke of the wheel. Eg for a Resilience Wheel of Learning you could have the following topics: Active listening; Self awareness & mood management; Wellbeing eg mindfulness; Self motivation and motivation of others; Relationship building and interpersonal skills; Stress management; Time and task management; Creativity and innovation. You could mark resilience overall for one of the spokes.

Resilience

NAME: _____ DATE: _____



INSTRUCTIONS:

Please change, split and name the sections so that they are meaningful to you.

The centre of the wheel is 0 and the outer edge is 10.

Rank your level of satisfaction or frustration (depending on how you use the wheel) for each area out of 10 by drawing a line across the section that represents your number (see example)

This now represents your

“-----”

Wheel of Learning

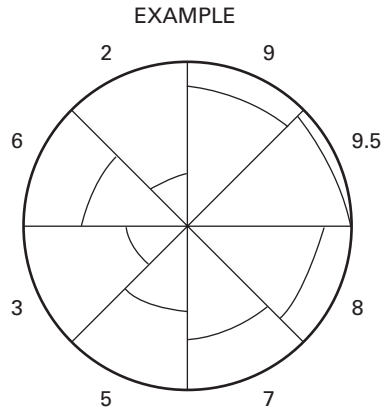
From the scores you give yourself you can set your ‘SMARTER’ goals for each area.

Email: sue@suefrance.com

I would love to hear your innovative ideas on how you use this form

Sue France Training

www.suefrance.com



RESOURCE 7

Preparation form for all negotiations

*Think of your own position as well as the other person/
party's position*

Brief description of the negotiation:		
	Mine/ours	Theirs
The ideal and best justifiable outcome: 'Aspire to'		
Realistic and satisfactory outcome: 'Content with'		
Acceptable minimum bottom line/fallback position: 'Live with'		
The essentials required (what we need/must have)		
The desirables required (what we want/intend to have/nice to have)		
Possible concessions/trade offs		
Best alternative to a negotiated agreement (BATNA)		

Consequences of winning or losing		
Negotiation style to be used in this negotiation		
Power: Who has what power in the relationship? Who controls resources? Who stands to lose the most if agreement isn't reached? What power does the other person have to deliver what you hope for?		
Opening statement:		
Type of relationship I would like to have when the negotiation is over:		
Possible solutions based on all of the considerations:		
Expected outcome:		