

FIELD GUIDE WORKBOOK

The Systems-Building Leader

*Eighteen diagnostic tools for developing organizational
systems that deliver sustainable value*



BUILD TRUST · DEVELOP EXPERTISE · CREATE EMPOWERMENT

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How to Use This Workbook

Each of the eighteen chapters in this book ends with a diagnostic tool designed to convert the chapter's argument into a structured practice. The tools are collected here for reference, application, and return visits. A tool completed once is a baseline. A tool completed quarterly is a development practice.

The tools are designed to be used in sequence for the first read-through. They are designed to be used selectively on return: the Stewardship Audit when a leader suspects their time allocation has drifted, the Safety Diagnostic after a difficult team dynamic, the Sustainability Audit whenever ownership feels like it is thinning. The most useful field guides are the ones that wear with use.

Setting up your binder

- Print single-sided on letter paper. The wide left margin is reserved for three-hole punching.
- Use three tab dividers: Build Trust, Develop Expertise, Create Empowerment. A divider page for each is included.
- Each tool carries its own page numbers, so any tool can be printed on its own.
- Print a fresh copy each time you run a tool. Date it, name the situation, and file it behind the earlier one.
- Record each run in the Tool Log at the back. Over time, the log shows which gaps are closing and which keep returning.

Where to Start

This book is designed to be read straight through. The three parts build on each other, and a reader who works through them in sequence will have the most complete picture of how the framework fits together.

But most leaders picking up this book can't start at the beginning and work methodically to the end. They're in the middle of something. A team that keeps escalating decisions that should be routine. A change initiative that launched well and is quietly reverting. A high performer whose promotion keeps getting deferred because the operation can't survive their absence. If any of that fits where you are, start where the problem is.

If your team depends too much on your personal presence: Start with Chapter 2 (Stewardship) and Chapter 14 (System Design). These two chapters, and their tools, address the working-in versus working-on distinction and the five structural conditions that produce dependency. Use Tool #2 and Tool #14 before reading anything else.

If accountability feels inconsistent or you find yourself adding oversight: Start with Chapter 3 (Accountability). Tool #3 is the most frequently used diagnostic in this book. Most leaders who complete it honestly will find at least one clarity gap they had attributed to a performance problem.

If your team is capable but not speaking up, or your meetings feel smooth but uninformative: Start with Chapter 5 (Psychological Safety) and Chapter 4 (Communication). Read them in that order. Tool #5's ten-second response question is the single most diagnostic question in the book.

If you have announced empowerment and nothing changed: Start with Chapter 13 (Empowerment Is Not Delegation). Tool #13 will identify which of the three preconditions is missing. The answer will point you to the specific chapter in Part Three that addresses it.

If a change you launched is reverting: Start with Chapter 17 (Reinforcement Loops). Tool #17's resistance diagnosis will identify whether you are facing a capability gap, a clarity gap, or a conviction gap. Each requires a different response.

If you are not sure where to start: Complete Tool #1 (The Trust Diagnostic) and Tool #7 (The Expertise Self-Assessment). Together they take about forty-five minutes and will surface your highest-leverage gap more reliably than any other entry point.

The minimum coherent unit: If you can only commit to three tools before deciding whether the rest of the framework is worth your time, use these three in this order: Tool #1 (Trust Diagnostic), Tool #8 (Root Cause Worksheet), Tool #13 (Empowerment Readiness Assessment).

Each represents one component from each of the three pillars. They stand on their own, and together they will give you a structural picture of your organization that most leaders have never seen clearly. Everything else in the book builds from what those three surface.

The Eighteen Tools

● PART ONE: BUILD TRUST

#1 The Trust Diagnostic

Chapter 1: Trust Is More Than a Personality Trait. Best used at the start of a leadership role and annually thereafter.

#2 The Stewardship Audit

Chapter 2: Stewardship: Leaders Who Design Systems. Best used when the leader suspects their time is being consumed by work the system should handle.

#3 The Accountability Design Worksheet

Chapter 3: Accountability: Moving Beyond Micromanagement. Best used when oversight feels necessary and the goal is to make it unnecessary.

#4 The Leader Voice Audit

Chapter 4: Communication: Synchronizing Signals. Best used when the leader suspects a gap between what they say and what the organization hears.

#5 The Safety Diagnostic

Chapter 5: Psychological Safety: When Honesty Is Rewarded. Best used after a difficult team dynamic or before a major change.

#6 The Change Cadence Planner

Chapter 6: Continuity During Change. Best used before any major change is announced.

● PART TWO: DEVELOP EXPERTISE

#7 The Expertise Self-Assessment

Chapter 7: Expertise Is Not Intelligence. Best used before working through Part Two and as a quarterly calibration.

#8 The Root Cause Worksheet

Chapter 8: Stop Asking Who Failed. Best used whenever the same type of problem recurs.

#9 The Metrics Governance Audit

Chapter 9: Metrics Governance: Informed Decision-making. Best used during any metrics review or when the dashboard has grown unwieldy.

#10 The Decision Quality Checklist

Chapter 10: When You Don't Have All the Facts. Best used before committing to any significant decision with incomplete information.

#11 The Learning Loop Design Template

Chapter 11: Operating Cadence: Learning from Experience. Best used when the organization keeps relearning the same lessons.

#12 The Strategic Tradeoff Framework

Chapter 12: Strategic Tradeoffs: The Discipline of Saying No. Best used during strategic planning or initiative prioritization.

● PART THREE: CREATE EMPOWERMENT

#13 The Empowerment Readiness Assessment

Chapter 13: Empowerment Is Not Delegation. Best used before announcing empowerment or expanding delegation.

#14 The Escalation Audit

Chapter 14: System Design: Build Things That Don't Need You. Best used when the leader's involvement is required too often for the operation to function independently.

#15 The Leadership Response Diagnostic

Chapter 15: Calibrated Authority: Right Level Right Time. Best used quarterly and whenever a team member's performance changes.

#16 The Capability Builder Conversation Guide

Chapter 16: Growth Infrastructure: Development by Design. Best used as a standing reference for every significant development conversation.

#17 The Change Reinforcement Diagnostic

Chapter 17: Reinforcement Loops: Making Change Stick. Best used when a change has launched and the question is whether it will hold.

#18 The Sustainability Audit

Chapter 18: Ownership Endurance: Protecting the Energy. Best used quarterly and whenever the team's initiative or decision quality seems to be declining.

● **AT THE BACK**

Tool Log

A running record of every tool you run, what it surfaced, and what you committed to.



PART ONE

Build Trust

Part One makes the case that trust is an engineering problem. Not a personality trait, not a relational achievement, but a designed condition that either exists in the structure of how the organization operates or does not exist at all.

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| #1 | The Trust Diagnostic |
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| #2 | The Stewardship Audit |
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| #3 | The Accountability Design Worksheet |
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| #4 | The Leader Voice Audit |
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| #5 | The Safety Diagnostic |
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| #6 | The Change Cadence Planner |
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FIELD GUIDE TOOL #1

The Trust Diagnostic

*Chapter 1: Trust Is More Than a Personality Trait*TOOL
1

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to distinguish between personal trust and structural trust in your organization. Work through both sections honestly before reading further.

When to use it. Best used at the start of a leadership role and annually thereafter.

Section A: Personal Trust Indicators

Rate each statement on a scale of 1 to 5: 1 = Rarely true, 2 = Occasionally true, 3 = Sometimes true, 4 = Often true, 5 = Consistently true.

Statement	Score (1–5)
People on my team would describe me as fair and consistent.	
I follow through on commitments I make to my team.	
My team feels comfortable raising problems with me directly.	
I give credit generously and take accountability when things go wrong.	
My team's engagement scores reflect their experience of me as a leader.	
Personal Trust Total (out of 25):	

Section B: Structural Trust Indicators

Rate each statement on a scale of 1 to 5: 1 = Rarely true, 2 = Occasionally true, 3 = Sometimes true, 4 = Often true, 5 = Consistently true.

TOOL
1

Statement	Score (1–5)
Decisions are made at the right level without frequent escalation to me.	
New team members reach full productivity within a predictable timeframe.	
Performance is consistent across the team regardless of who is managing on a given day.	
Problems surface early, before they become crises.	
The team operates well when I am absent or unavailable.	
Structural Trust Total (out of 25):	

Interpreting Your Scores

Pattern	What it suggests	Where to focus
High personal, low structural	The system depends on you. Risk increases as you scale or step back.	Chapters 2–6: all five structural components
Low personal, high structural	The system works but relationship quality is limiting engagement and candor.	Chapter 4 (Communication) and Chapter 5 (Psychological Safety)
Both high	Strong foundation. Focus on sustaining under growth and change.	Chapter 6 (Continuity) as the next priority
Both low	Structural redesign is urgent. Start with Chapter 2 (Stewardship) before any others.	Chapter 2 first, then work sequentially

The Reliability Gap

Answer these two questions as honestly as you can.

Question	Your Answer
How does your team perform when you are fully present and engaged?	
How does your team perform when you are absent, unavailable, or distracted?	
What is the gap between those two states, and what does it tell you?	

Before moving to Chapter 2, confirm:

- ☐ You have scored both sections honestly, not aspirationally.
- ☐ You have noted the gap between your personal and structural trust scores.
- ☐ You have identified the reliability gap in your team’s performance.
- ☐ You know which chapter addresses your most urgent structural gap.

FIELD GUIDE TOOL #2

The Stewardship Audit

Chapter 2: Stewardship: Leaders Who Design Systems

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to map where your time is currently concentrated and identify the system design work that your operational involvement is replacing.

When to use it. Best used when the leader suspects their time is being consumed by work the system should handle.

TOOL
2

Part A: The Recurring Fire Inventory

List the three to five operational situations that most regularly require your personal involvement. Be specific about the type of situation, not individual incidents.

Recurring situation	How often does it require you personally?
1.	
2.	
3.	
4.	
5.	

Part B: The Structural Diagnosis

For each recurring situation above, identify the structural condition that makes it predictable. Use the five categories from Chapter 8 as a guide.

Recurring situation	Structural category	Specific design gap
1.		
2.		
3.		
4.		
5.		

Part C: The Two-Week Test

Answer these questions as honestly as you can about what would happen if you were unreachable for two weeks.

Question	Your honest answer
Which decisions would stall waiting for your return?	
Which clients or stakeholders would be affected by your absence?	
Which team members would be uncertain about what to do without you?	
What would be in worse shape when you returned than when you left?	
What does this tell you about where system design work is most needed?	

Part D: The Time Allocation

Estimate how your time is currently distributed between working in and working on activities.

Activity type	Estimated % of time
Solving operational problems personally	
Making decisions that others escalated to you	
Reworking or reviewing others' deliverables	
Managing individual exceptions to normal process	
Redesigning roles, processes, or decision frameworks	
Building team capability and judgment	
Reducing future escalation through structural work	
Working In total (rows 1–4) / Working On total (rows 5–7):	

TOOL
2

Before moving to Chapter 3, confirm:

- ☐ You have identified your top three to five recurring fires.
- ☐ You have named the structural condition behind at least two of them.
- ☐ You have completed the two-week test honestly.
- ☐ You have a realistic estimate of your current working in vs. working on split.
- ☐ You have identified one protected time block you will create or defend for system work.

FIELD GUIDE TOOL #3

The Accountability Design Worksheet

Chapter 3: Accountability: Moving Beyond Micromanagement

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess the four structural components of accountability for any role or workstream. Complete one worksheet per team member or function where accountability feels unreliable.

When to use it. Best used when oversight feels necessary and the goal is to make it unnecessary.

Part A: Outcome Clarity

For the role or workstream you are assessing, answer each question as specifically as possible. Vague answers indicate clarity gaps.

Question	Current state
What does a successful outcome look like for this role or workstream?	
Could the team member describe success in the same terms you would use?	
What are the two or three most important results this role is responsible for?	
Is there a written description of expected outcomes available to the team member?	
Clarity rating (High / Medium / Low):	

Part B: Standards Clarity

Standards define the difference between acceptable and excellent. Most clarity failures live here.

Question	Current state
What does “good enough” look like for the most important outputs in this role?	
What does “excellent” look like? What separates the two?	
What are the nonnegotiables: the things that are never acceptable regardless of circumstances?	
Are these standards documented and shared, or do they live only in your head?	
Have you reviewed the standards with this team member and confirmed shared understanding?	
Clarity rating (High / Medium / Low):	

Part C: Decision Rights

List the ten to fifteen most common decisions this role encounters. For each, identify who has authority to decide.

Decision type	Who decides?	Escalation trigger
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
How many of these are documented and communicated?		

Part D: Review Cadence

A predictable cadence reduces ambient escalation and creates structured space for course correction.

Question	Current state
How often do you formally review progress with this team member?	
Is the cadence predictable enough that they can plan around it?	
Does the review cover outcomes and standards, or mainly activity?	
Is there a clear agenda or structure for these reviews?	
What happens between reviews when something is unclear or urgent?	
Cadence rating (Predictable / Inconsistent / Absent):	

TOOL

3

Diagnostic Summary

Use your ratings from Parts A through D to identify where structural work is most needed.

Component	Rating and priority action
Outcome Clarity	
Standards Clarity	
Decision Rights	
Review Cadence	
Overall accountability structure (Strong / Developing / Needs redesign):	

TOOL

3

Before moving to Chapter 4, confirm:

- ☐ You have completed the worksheet for at least one role or workstream.
- ☐ You have identified which of the four components has the most significant clarity gap.
- ☐ You have named one specific structural fix you will make before the end of this week.
- ☐ You have reviewed whether any current oversight or approval step is compensating for a clarity gap rather than addressing a genuine risk.

FIELD GUIDE TOOL #4

The Leader Voice Audit

Chapter 4: Communication: Synchronizing Signals

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess alignment across all five communication channels. Complete it based on the last 30 days of your behavior, not your intentions.

When to use it. Best used when the leader suspects a gap between what they say and what the organization hears.

Channel Assessment

For each channel, describe what your behavior over the last 30 days communicated, then assess alignment with your stated priorities.

Channel	What did my behavior communicate? Alignment rating (High / Medium / Low)
What I said: The explicit messages, stated priorities, and formal communications I sent.	
What I repeated: The topics and themes I returned to consistently across multiple settings.	
What I reinforced: Who and what I recognized, promoted, praised, or allocated resources to.	
What I tolerated: Behaviors or situations that contradicted my stated values that I did not address.	
What I decided: The resource, priority, and direction decisions I made and what they revealed.	

TOOL
4

Misalignment Diagnostic

Identify any gaps between channels. The most common and damaging misalignments appear below.

Misalignment type	Is this present? Evidence
I said X matters, but I reinforced Y instead.	
I said X is unacceptable, but I tolerated it when it occurred.	
I said X is the priority, but my decisions allocated resources to Y.	
I asked for input, but I did not close the loop on what I heard.	
I communicated a change, but I did not repeat it consistently enough to establish it.	

TOOL
4

The Loop Closure Review

List the last five significant pieces of input, concern, or feedback you received from your team. For each, assess whether you closed the loop.

Input or concern raised	Did you close the loop?	If not, what is the follow-up?
1.		
2.		
3.		
4.		
5.		

Priority Action

Based on your audit, identify the single most important communication alignment to address in the next thirty days.

Question	Your answer
What is the most significant misalignment you identified?	
Which channel does it involve?	
What specific behavior will you change to address it?	
How will you know in thirty days whether the change has taken effect?	

Before moving to Chapter 5, confirm:

- ☐ You have completed the channel assessment based on recent behavior.
- ☐ You have identified at least one concrete misalignment between your channels.
- ☐ You have reviewed the loop closure status of recent input from your team.
- ☐ You have named one specific behavioral change you will make in the next thirty days.

FIELD GUIDE TOOL #5

The Safety Diagnostic

Chapter 5: Psychological Safety: When Honesty Is Rewarded

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess the current state of psychological safety in your team. Answer each question based on observed behavior, not aspirations or policies.

When to use it. Best used after a difficult team dynamic or before a major change.

Section A: Safety Climate Indicators

Rate each statement on a scale of 1 to 5: 1 = Rarely true, 2 = Occasionally true, 3 = Sometimes true, 4 = Often true, 5 = Consistently true.

Indicator	Score (1–5)
Team members raise concerns in meetings, not just in private conversations afterward.	
People ask questions that reveal gaps in their own knowledge without apparent discomfort.	
Mistakes are acknowledged openly and discussed for learning rather than attributed and moved past.	
Dissenting views are raised and engaged with, not just acknowledged and set aside.	
New team members speak up within their first month at a similar rate to experienced members.	
The quality of input you receive in meetings matches what you hear in informal conversations.	
Safety Climate Total (out of 30):	

Section B: Leader Behavior Indicators

These questions assess your own behavior as the primary shaper of safety climate. Answer honestly.

Question	Honest answer
When someone raises a concern you disagree with, what is your typical first response?	
When was the last time you publicly acknowledged being wrong about something?	
Do you ask for input before you have finished your own thinking, or after?	
When someone raises something difficult and the meeting moves on, do you follow up?	
Can you recall a specific recent moment when someone took an interpersonal risk in your presence? What did you do in the ten seconds after?	

TOOL

5

Section C: The Signal Audit

These questions surface the informal signals your team is reading.

Question	Your assessment
Are there topics that used to come up in meetings that no longer do? What are they?	
Is there a gap between what people say in one-on-ones and what they say in group settings?	
Are there people on your team who never raise concerns in meetings? What do you know about why?	
When you look back at your last major decision, what concerns were raised? What concerns might have existed but were not raised?	

Priority Action

Identify the single most important change to your response behavior in the next thirty days.

Question	Your answer
What is the clearest signal your team is currently receiving that makes speaking up feel risky?	
What specific behavior will you change in how you respond when someone raises a difficult point?	
How will you know in sixty days whether the safety climate has shifted?	

TOOL
5

Before moving to Chapter 6, confirm:

- ☐ You have scored the safety climate indicators based on observed behavior.
- ☐ You have answered the leader behavior questions honestly, including the ten-second response question.
- ☐ You have identified at least one topic that is not being raised in meetings that should be.
- ☐ You have named one specific behavioral change in how you respond to difficult input.

FIELD GUIDE TOOL #6

The Change Cadence Planner

Chapter 6: Continuity During Change

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool when leading your team through a significant change. Complete each section before the change is announced and revisit it monthly throughout the transition.

When to use it. Best used before any major change is announced.

Part A: Narrative Stability Assessment

Answer each question before communicating the change to your team. Gaps here are the most common source of trust erosion.

Question	Your answer
What is the underlying logic that connects this change to the organization's longer-term direction?	
What has changed since the last strategic communication, and why?	
What has not changed? What commitments and values remain constant?	
What were the honest reasons the previous direction was insufficient?	
How does this change incorporate what was learned from what came before?	

Question	Your answer
Can you articulate this in two pages or fewer, in plain language, without a slide deck?	

Part B: The Three Causes Diagnostic

Assess the risk of each trust-eroding pattern for this specific change.

Risk	Likelihood (High / Med / Low)	Your mitigation plan
Shifting rationale: The stated reason for the change may evolve without acknowledgment.		
Priority volatility: The priorities that determine how people spend time may shift before this change is embedded.		
Cadence breakdown: Communication may become sparse in the weeks following the announcement.		

Part C: The Communication Cadence

Define your communication structure for the transition period. Be specific about format, frequency, and owner.

Communication type	Format, frequency, and owner
Regular written update to the full team	
All-hands or team meeting with Q&A	
Individual check-ins with key stakeholders	
Informal presence in team spaces	
Feedback mechanism: How will you hear what the team is actually thinking?	

Part D: The Constants

List explicitly what will not change. This section is as important as the change announcement itself.

Category	What will remain constant
Values and operating principles	
Commitments to team members	
Standards for how work gets done	
Relationships with key clients or partners	
Team structure and roles (or explicit exceptions)	

Part E: Monthly Review

Revisit these questions monthly throughout the transition. Honest answers will surface emerging trust problems before they become disengagement.

Question	Current State
Is the team's understanding of the rationale consistent with your own?	
Are there concerns circulating informally that have not been raised formally?	
Has the stated rationale shifted since the announcement? Has that shift been acknowledged?	
Is the communication cadence being honored consistently?	
On a scale of 1 to 5 (1 = no commitment evident, 3 = mixed or compliant, 5 = strong and consistent commitment), how would you rate the team's current commitment to the direction?	
What is the most important thing you need to communicate or clarify in the next two weeks?	

Before communicating the change to your team, confirm:

- ☐ You have articulated the underlying logic that connects this change to what came before.
- ☐ You have identified and named what will not change.
- ☐ You have acknowledged honestly what the previous direction did not achieve.
- ☐ You have a specific, scheduled communication cadence for the transition period.
- ☐ You have a mechanism to hear what the team is thinking, not just what they are willing to say formally.



PART TWO

Develop Expertise

Part Two makes the case that expertise is not synonymous with intelligence. The intelligent leader who hasn't built the structural disciplines of systems thinking, metrics governance, uncertainty judgment, operating cadence, and executive calibration is producing results that depend on their personal cognitive engagement with every significant problem. When they step back, the results degrade. When they scale, the intelligence doesn't replicate. When they leave, the capability leaves with them.

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- #7 The Expertise Self-Assessment
 - #8 The Root Cause Worksheet
 - #9 The Metrics Governance Audit
 - #10 The Decision Quality Checklist
 - #11 The Learning Loop Design Template
 - #12 The Strategic Tradeoff Framework

FIELD GUIDE TOOL #7

The Expertise Self-Assessment

*Chapter 7: Expertise Is Not Intelligence*TOOL
7

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to establish a baseline across the five dimensions of organizational expertise before working through Chapters 8 through 12. Rate yourself honestly on current practice, not aspiration.

When to use it. Best used before working through Part Two and as a quarterly calibration.

Section A: Current Contribution Profile

For each statement, rate how accurately it describes your current mode of contribution on a scale of 1 to 5: 1 = Rarely true, 2 = Occasionally true, 3 = Sometimes true, 4 = Often true, 5 = Consistently true.

Statement	Score (1–5)
When a problem repeats, I trace it to a structural cause before responding.	
The metrics I review regularly change my behavior when they move.	
I have a structured approach to decisions I make when information is incomplete.	
My team has a regular rhythm for reviewing what is working and adjusting accordingly.	
When I make a strategic tradeoff, I can articulate explicitly what I am choosing not to do and why.	
My contribution to the organization's capability does not depend on my personal presence.	

Section B: The Intelligence-Expertise Gap

These questions surface the specific ways intelligence may be substituting for structural expertise.

Question	Your honest answer
What decisions in your organization require your personal involvement to reach a good outcome?	
Which of those decisions could be made as well without you if the right structure existed?	
Where does your team defer to your judgment rather than applying a framework of their own?	
What structural improvements have you been meaning to build but have not yet prioritized?	
In which of the five expertise dimensions do you compensate most with intelligence rather than structure?	

TOOL

7

Section C: The Five Dimensions Baseline

Rate your current organizational practice in each dimension on a scale of 1 to 5: 1 = Ad hoc / no consistent practice, 2 = Emerging / occasional application, 3 = Inconsistent / applied in some areas, 4 = Mostly systematic, 5 = Systematically designed and consistently applied.

TOOL
7

Dimension	Current rating (1–5)	Most important gap to address
Systems thinking: diagnosing structural causes before individuals		
Metrics governance: measuring what governs decisions		
Uncertainty judgment: structured approaches to incomplete information		
Operating cadence: embedded learning rhythms		
Executive calibration: explicit tradeoff reasoning		

Priority Focus

Based on your self-assessment, identify where to concentrate your development effort.

Question	Your answer
Which dimension has the lowest current rating?	
Which dimension, if improved, would have the greatest impact on your organization's performance?	
Which chapter in this section will you read most carefully?	
What specific structural improvements will you commit to making during this section of the book?	

TOOL
7

Before moving to Chapter 8, confirm:

- ☐ You have rated yourself honestly across the six contribution profile statements.
- ☐ You have identified which decisions in your organization depend on your personal judgment rather than structural design.
- ☐ You have rated your current practice across all five expertise dimensions.
- ☐ You have identified your highest-priority development focus for Part Two.

FIELD GUIDE TOOL #8

The Root Cause Worksheet

Chapter 8: Stop Asking Who Failed

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool whenever a problem has surfaced more than once. Work through the five stages before deciding on an intervention.

When to use it. Best used whenever the same type of problem recurs.

TOOL
8

Stage 1: Name the Pattern

Before diagnosing causes, be precise about what you are looking at. A named pattern is easier to trace than a vague frustration.

Question	Your Answer
What is the specific type of problem?	
How many times has this occurred in the last ninety days?	
What function or process does it involve?	
What is the downstream impact when it occurs?	
Is the impact consistent, or does it vary?	

Stage 2: Run the Five Whys

Start with the presenting event and ask why five times, or until you reach a structural condition. Write each answer in sequence.

	Response
Event: What specifically happened?	
Why #1: Why did this happen?	
Why #2: Why did that happen?	
Why #3: Why did that happen?	
Why #4: Why did that happen?	
Why #5: Why did that happen?	
Root condition identified:	

Stage 3: Classify the Structural Cause

The root condition you identified almost certainly belongs to one of five structural categories. Identifying which one determines what kind of solution is needed.

Category	Does this apply? Notes
Role Clarity: unclear ownership, overlapping accountability, gaps in responsibility	
Decision Rights: ambiguous authority, approval bottlenecks, unclear escalation paths	
Workflow Design: poor handoffs, missing steps, redundant reviews, unclear sequencing	
Metrics and Incentives: measuring or rewarding the wrong behavior, misaligned targets	
Feedback Loops: delayed detection, missing review cadence, no leading indicators	

TOOL

8

Stage 4: Assess Impact and Frequency

Not all structural causes are equally consequential. This stage forces a prioritization decision.

Question	Your Assessment
How frequently does this structural condition produce problems? (Daily / Weekly / Monthly)	
What is the severity of impact when it does? (High / Medium / Low)	
What is the cumulative cost over 12 months if unaddressed?	
Does addressing this require cross-functional coordination?	
What is the effort required to address it? (High / Medium / Low)	
Priority assessment (High / Medium / Defer):	

TOOL

8

Stage 5: Design the Structural Response

Based on your classification and prioritization, define a response that addresses the cause rather than the symptom.

Element	Your Response
What structural change will address the root condition?	
What needs to stop in order to make room for this?	
Who owns the redesign?	
What leading indicator will tell you if the change is working?	
What is the review date to assess impact?	
What performance conversation (if any) is still needed?	

TOOL
8

Before finalizing your response, confirm:

- ☐ You have identified a structural condition, not just an individual action.
- ☐ Your response addresses the condition, not just the symptom.
- ☐ You have named a leading indicator to track effectiveness.
- ☐ You have set a review date.
- ☐ You have been explicit about what work will stop to create capacity for this.

FIELD GUIDE TOOL #9

The Metrics Governance Audit

Chapter 9: Metrics Governance: Informed Decision-making

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess your current measurement system against the governance standard. Work through all four parts before making any changes to your dashboard.

When to use it. Best used during any metrics review or when the dashboard has grown unwieldy.

Part A: The Full Inventory

List every metric currently reviewed in your regular leadership forums. Include the forum, frequency, and current owner for each.

TOOL
9

Metric name	Forum and frequency	Current owner
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
(continue as needed)		

Part B: The Three Tests

Apply the three governance tests to each metric. Be honest: Optimistic assessments defeat the purpose of the exercise.

Metric	Passes behavior change test? (Y/N)	Passes ownership test? (Y/N)
1.		
2.		
3.		
4.		
5.		

Metric	Passes decision relevance test? Last time it triggered a specific action?
1.	
2.	
3.	
4.	
5.	

Part C: The Leading Indicator Map

For each critical lagging indicator, identify the leading indicators that most reliably predict it and are within your influence.

Lagging indicator	Leading indicator 1	Leading indicator 2
1.		
2.		
3.		
4.		

Part D: The Governance Decision

Based on your audit, assign each metric to a category and define the next action.

Metric	Category (Governance / Reporting / Retire)	Next action
1.		
2.		
3.		
4.		
5.		
6.		
Summary: How many metrics will remain in real-time governance review?		

Before moving to Chapter 10, confirm:

- ☐ You have inventoried every metric in your current regular leadership reviews.
- ☐ You have applied all three governance tests to each metric honestly.
- ☐ You have identified the leading indicators for your most critical lagging outcomes.
- ☐ You have made a governance decision for each metric: keep, reclassify to reporting, or retire.
- ☐ You have a specific number of governance metrics that will remain in your real-time review after the audit.

FIELD GUIDE TOOL #10

The Decision Quality Checklist

Chapter 10: When You Don't Have All the Facts

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool before committing to any significant decision made under conditions of genuine uncertainty. The goal is not to eliminate uncertainty but to make the decision structure explicit enough to be examined and improved.

When to use it. Best used before committing to any significant decision with incomplete information.

Part A: Environment Classification

Before applying any decision framework, establish which environment you are actually in.

Question	Your answer
Can you estimate meaningful probabilities for the key outcomes? (If yes: Risk environment)	
Can you identify plausible outcomes but not assign probabilities? (If yes: Uncertainty environment)	
Is the problem definition itself unclear? (If yes: Ambiguity environment)	
Which environment are you in, and what does that mean for your approach?	

TOOL
10

Part B: The Key Assumptions

List the three to five assumptions on which this decision most critically depends. For each, answer all three questions.

Assumption	What evidence supports it?	What would cause you to revise it?
1.		
2.		
3.		
4.		
5.		

Part C: Scenario Test

Map two to three plausible scenarios and assess the decision against each.

Scenario	Key conditions	Decision outcome in this scenario
Scenario 1 (base case):		
Scenario 2 (downside case):		
Scenario 3 (upside case):		
Which decision is most robust across scenarios?		

Part D: Reversibility Assessment

Establish what level of process this decision warrants.

Question	Your answer
What is the cost of being wrong and needing to course-correct?	
How quickly could you reverse or significantly modify this decision if needed?	
Is there a reversible version of this decision that would generate useful information?	
Based on reversibility, what level of deliberation does this decision warrant?	

TOOL
10

Part E: Recalibration Triggers

Define the conditions under which you will formally revisit this decision.

Trigger type	Specific trigger and date
Assumption-based trigger: If assumption X is contradicted by evidence, we will review.	
Indicator-based trigger: If leading indicator Y crosses threshold Z, we will reconvene.	
Time-based trigger: Regardless of the above, we will formally reassess on this date.	
Who is responsible for monitoring the triggers and initiating the review?	

Before committing to the decision, confirm:

- ☐ You have classified the decision environment correctly and chosen an approach appropriate to it.
- ☐ You have named the key assumptions explicitly and identified what evidence would cause you to revise each one.
- ☐ You have tested the decision against at least two plausible scenarios.
- ☐ You have assessed reversibility and calibrated the level of deliberation accordingly.
- ☐ You have defined specific recalibration triggers and assigned responsibility for monitoring them.

FIELD GUIDE TOOL #11

The Learning Loop Design Template

Chapter 11: Operating Cadence: Learning from Experience

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to design or audit the operating cadence for your team or function. Complete all three levels. A cadence that exists at only one level is incomplete.

When to use it. Best used when the organization keeps relearning the same lessons.

Part A: The Weekly Cadence

Design the structure for your weekly operational learning loop.

Element	Your design
Forum: What meeting or structure will host this cadence?	
Duration: How long? (Target: thirty minutes or less)	
Standing agenda item 1: What did we plan to happen this week?	
Standing agenda item 2: What actually happened? Where was the gap?	
Standing agenda item 3: What specific adjustment are we making based on the gap?	
Owner of each adjustment: Who is accountable, and by when?	
Current state: Does this cadence exist? (Yes / Partial / No)	

Part B: The Monthly Cadence

Design the structure for your monthly structural learning loop.

Element	Your design
Forum: what meeting or structure will host this cadence?	
Duration: how long? (Target: sixty to ninety minutes)	
Standing agenda item 1: What patterns are appearing across weekly cycles?	
Standing agenda item 2: What structural conditions are producing those patterns?	
Standing agenda item 3: What is the one structural change we will make this month?	
How is the structural change defined specifically enough to be implemented and assessed?	
Current state: Does this cadence exist? (Yes / Partial / No)	

Part C: The Quarterly Cadence

Design the structure for your quarterly strategic learning loop.

Element	Your design
Forum: What meeting or structure will host this cadence?	
Duration: How long? (Target: half day)	
Standing agenda item 1: Are our leading indicators confirming our strategic assumptions?	
Standing agenda item 2: What assumptions have been tested and what did we learn?	
Standing agenda item 3: Is the organization getting structurally better, or just operationally busier?	
How does the output of the quarterly cadence feed back into the monthly and weekly cadences?	
Current state: Does this cadence exist? (Yes / Partial / No)	

The Operating Standard

Capture the structural lessons your organization has already learned that are not yet embedded in how the work is structured.

Recurring problem or gap	Structural condition behind it	Specific structural fix to embed
1.		
2.		
3.		
4.		
5.		

Before moving to Chapter 12, confirm:

- ☐ You have designed a specific structure for all three cadence levels.
- ☐ You have identified which cadence levels currently exist in your organization and which are missing.
- ☐ You have populated the operating standard with at least three recurring structural gaps your team has encountered more than once.
- ☐ You have assigned ownership for the structural fixes in the operating standard.

FIELD GUIDE TOOL #12

The Strategic Tradeoff Framework

Chapter 12: Strategic Tradeoffs: The Discipline of Saying No

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool when making any significant resource allocation decision: budget cycles, initiative prioritization, talent deployment, or strategic planning. Work through all five parts before finalizing the decision.

When to use it. Best used during strategic planning or initiative prioritization.

Part A: The Portfolio Inventory

List all current active initiatives, projects, and strategic commitments competing for the same resource pool.

Initiative	Resource requirement	Current status and momentum
1.		
2.		
3.		
4.		
5.		
6.		
(continue as needed)		

Part B: The Five Framework Questions

Work through each question before making the allocation decision.

Question	Your answer
What is actually scarce? Name the specific constrained resource.	
What behavior will this decision reinforce in the organization?	
What will explicitly stop? Name the initiatives being paused or closed.	
What leading indicators will tell you early whether this is working?	
Can you explain the rationale clearly to the people affected? Write it in two sentences.	

Part C: The Distortion Check

Review the five common distortions before finalizing the decision.

Distortion	Is this affecting the current decision? How?
Recency bias: Am I overweighting recent performance or events?	
Availability bias: Am I missing information that is less immediately accessible?	
Escalation of commitment: Am I continuing something because of past investment rather than future prospects?	
Activity bias: Am I approving action because it feels productive rather than because it moves toward a defined outcome?	
Metric myopia: Am I overweighting initiatives with clear metrics at the expense of ones with harder-to-measure value?	

Part D: The Pre-Mortem

Assume it is twelve months from now and this decision has failed significantly. What are the most likely causes?

Likely failure cause	Mitigation or monitoring response
1.	
2.	
3.	
4.	
Which assumption is most fragile, and how will you monitor it?	

Part E: The Decision Record

Complete this entry at the time of the decision for your decision journal.

Element	Record
Decision made:	
Key assumptions on which it rests:	
Alternatives considered and why they were not chosen:	
Primary risk and mitigation plan:	
Leading indicator to watch:	
Recalibration date:	

TOOL
12

Before moving to Part Three, confirm:

- ☐ You have inventoried your current active portfolio against the resource constraint.
- ☐ You have worked through all five framework questions and named explicitly what will stop.
- ☐ You have checked the decision against all five common distortions.
- ☐ You have run a pre-mortem and identified your most fragile assumption.
- ☐ You have completed a decision journal entry with a committed recalibration date.



PART THREE

Create Empowerment

Part Three makes the case that delegating is not empowerment. The leader who announces empowerment without building the structural conditions for it produces a formal change in authority that produces no change in behavior, because behavior is shaped by structure and not by announcements.

#13 The Empowerment Readiness Assessment

#14 The Escalation Audit

#15 The Leadership Response Diagnostic

#16 The Capability Builder Conversation Guide

#17 The Change Reinforcement Diagnostic

#18 The Sustainability Audit

FIELD GUIDE TOOL #13

The Empowerment Readiness Assessment

Chapter 13: Empowerment Is Not Delegation

TOOL
13

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool before announcing or expanding empowerment in any domain. The three preconditions must be assessed honestly. Gaps identified here point directly to the structural work that Chapters 14 through 18 will address.

When to use it. Best used before announcing empowerment or expanding delegation.

Precondition 1: Domain Clarity

For the domain you are considering empowering, answer each question with enough specificity that a team member could act on the answer.

Question	Current state
What decisions are fully within the team member's authority to make without consultation?	
What decisions require consultation before acting?	
What decisions require escalation regardless of circumstances?	
What quality standards apply in this domain, and are they documented?	
What are the nonnegotiables: things that are never acceptable regardless of context?	

Question	Current state
Domain clarity rating (High / Partial / Low):	

Precondition 2: Capability Alignment

Assess the team member's current capability against the requirements of the domain.

Question	Current state
What knowledge and skills does full performance in this domain require?	
Where is the team member currently relative to those requirements?	
What is the plan for closing any capability gap before or alongside the authority transfer?	
Are there specific decisions within the domain that require capability the team member does not yet have?	
Capability alignment rating (Strong / Developing / Insufficient):	

Precondition 3: Safety Net

Assess whether the conditions exist for the team member to exercise authority without prohibitive risk of failure.

Question	Current state
What is the cost of a wrong decision in this domain, and is it proportionate to current capability?	
Is there a clear process for recovering from wrong decisions?	
Does the team member have confidence that mistakes will produce learning rather than punishment?	
Are the highest-stakes decisions in the domain separated from the lower-stakes ones, with authority extended incrementally?	
Safety net rating (Strong / Partial / Weak):	

TOOL
13

Empowerment Readiness Summary

Use your three ratings to determine what structural work is needed before empowerment is extended or announced.

Precondition	Current rating	Structural work needed before transfer
Domain clarity		
Capability alignment		
Safety net		
Overall readiness (Ready / Needs preparation / Not yet ready):		

Before moving to Chapter 14, confirm:

- ☐ You have assessed all three preconditions honestly for at least one domain you are considering empowering.
- ☐ You have identified which precondition has the most significant gap.
- ☐ You have named the specific structural work needed before the authority transfer will be workable.
- ☐ You have identified which chapter in Part Three most directly addresses your primary gap.

FIELD GUIDE TOOL #14

The Escalation Audit

Chapter 14: System Design: Build Things That Don't Need You

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to map the structural conditions producing dependency and recurring escalation in your current operation. Complete Part A before attempting any design work. The diagnosis must precede the solution.

When to use it. Best used when the leader's involvement is required too often for the operation to function independently.

TOOL
14

Part A: The Escalation Inventory

List the ten to fifteen situations that most frequently require your personal involvement. Be specific about the type of situation, not individual incidents.

Situation type	Frequency	Why does it require you personally?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Part B: Structural Diagnosis

For each escalation type, identify which structural condition is absent or insufficient.

Situation type	Structural condition (Role / Decision / Workflow / Metrics / Feedback)	Specific design gap
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Part C: Priority Design Work

Identify the two or three structural gaps that are producing the most escalation volume. These are your priority design targets.

Priority gap	Design response and owner
Gap 1:	
Gap 2:	
Gap 3:	
What will you stop doing personally once these gaps are closed?	

Part D: The Judgment Documentation

For the judgment calls that cannot yet be structurally replaced, begin documenting the criteria behind them.

Judgment call type	Criteria I apply when making this call
1.	
2.	
3.	
4.	
5.	
Who will I review this documentation with, and by when?	

TOOL
14

Before moving to Chapter 15, confirm:

- ☐ You have inventoried at least ten recurring escalation types honestly.
- ☐ You have diagnosed the structural condition behind each one.
- ☐ You have identified your two or three highest-priority design targets.
- ☐ You have begun documenting the criteria behind your most frequent personal judgment calls.
- ☐ You have named specifically what you will stop doing once the structural gaps are closed.

FIELD GUIDE TOOL #15

The Leadership Response Diagnostic

Chapter 15: Calibrated Authority: Right Level Right Time

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess your current management approach for each team member against the capability and engagement framework. Complete one row per person. Be honest about both dimensions: Optimistic assessments produce the wrong response.

When to use it. Best used quarterly and whenever a team member's performance changes.

Part A: Team Assessment

For each team member, assess their current capability and engagement in their primary area of responsibility. Rate each on a scale of 1 to 5: 1 = Low / minimal evidence, 2 = Developing, 3 = Adequate / variable, 4 = Strong, 5 = High / consistent evidence.

Team member	Capability (1–5) and evidence	Engagement (1–5) and evidence
1.		
2.		
3.		
4.		
5.		
6.		

Part B: Quadrant Placement and Response

Place each team member in the appropriate quadrant and identify the response adjustment needed.

Team member	Current quadrant (Clarify / Guide / Engage / Empower)	Response adjustment needed
1.		
2.		
3.		
4.		
5.		
6.		

Part C: Delegation Precision Check

For any team member receiving increased autonomy, confirm the five delegation elements are in place.

Element	In place? (Yes / No / Needs clarification)
Outcome: success defined specifically enough for independent recognition	
Decision rights: autonomous vs. consultation vs. escalation decisions named	
Risk tolerance: acceptable limits explicitly communicated	
Escalation threshold: specific situations that warrant pulling the leader back in	
Review cadence: when and how progress will be reviewed	

Part D: The Invisible Control Audit

Answer these questions honestly about your current management behavior.

Question	Honest answer
When a team member makes a decision differently from how you would have made it, what do you typically do?	
How often do you check in on work you have said belongs to someone else?	
Have you overridden or revisited a team member’s decision in the last ninety days? What happened?	
Would your team members describe the autonomy you grant as real or nominal?	
What is one specific behavior you will change to make your delegation more genuine?	

TOOL

15

Before moving to Chapter 16, confirm:

- ☐ You have assessed every direct report on both capability and engagement dimensions.
- ☐ You have placed each team member in a quadrant and identified a specific response adjustment.
- ☐ You have confirmed the five delegation elements are in place for team members receiving increased autonomy.
- ☐ You have answered the invisible control questions honestly and identified one behavioral change.

FIELD GUIDE TOOL #16

The Capability Builder Conversation Guide

Chapter 16: Growth Infrastructure: Development by Design

DATE _____ COMPLETED BY _____

SITUATION _____

Use this guide to structure development conversations with each team member. The guide covers three distinct conversation types: the stretch assignment conversation, the feedback conversation, and the debrief. Each has a specific structure and purpose.

When to use it. Best used as a standing reference for every significant development conversation.

Conversation Type 1: The Stretch Assignment Conversation

Use this structure when identifying and assigning a stretch opportunity. Hold before the assignment begins.

Element	Leader's prompt and notes
Capability gap: What specific capability is this assignment designed to develop?	
Challenge level: Why is this genuinely difficult for this person at this moment?	
Stakes: What makes the outcome real, with visible consequences?	
Support available: What will you provide, and what will you withhold to preserve the productive struggle?	
Feedback mechanism: When and how will they receive feedback during the assignment?	

TOOL
16

Element	Leader's prompt and notes
Success definition: What does a good outcome look like for this developmental purpose?	

Conversation Type 2: The Feedback Conversation

Use this structure when delivering developmental feedback after a significant piece of work. Hold within forty-eight hours where possible.

Step	Leader's action and language
1. Observe: Name the specific behavior you observed, without evaluation.	
2. Connect: Explain the outcome that behavior produced, and why.	
3. Define different: Describe specifically what a different approach would look like.	
4. Invite self-assessment: Ask for their view before concluding. "How did you see it?"	
5. Commit: Agree on one specific thing they will do differently in the next similar situation.	

Conversation Type 3: The Debrief

Use this structure after every significant assignment, client engagement, or stretch situation. Hold within 48 hours.

Debrief question	Notes from this debrief
What was the central challenge in this situation?	
What choices did you make, and why?	
What did those choices produce?	
What would you do differently, and why?	
What generalizable principle does this experience point to?	
Where else does that principle apply?	

The Stretch Assignment Map

Maintain this map for each team member in the Clarify or Guide quadrant. Review quarterly.

Team member	Capability gap to address	Next stretch assignment type
1.		
2.		
3.		
4.		
5.		
6.		

Before moving to Chapter 17, confirm:

- ☐ You have identified the specific capability gap for each team member in the Clarify or Guide quadrant.
- ☐ You have defined the next stretch assignment type for each of those team members.
- ☐ You have a standing debrief practice or have committed to building one.
- ☐ You have restructured at least one one-on-one to protect time for development conversation before operational discussion.

FIELD GUIDE TOOL #17

The Change Reinforcement Diagnostic

Chapter 17: Reinforcement Loops: Making Change Stick

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool when launching or assessing a significant behavioral change. Complete Part A before the launch to design the reinforcement architecture. Use Parts B and C to diagnose and address reversion during implementation.

When to use it. Best used when a change has launched and the question is whether it will hold.

Part A: Pre-Launch Reinforcement Design

For each of the four reinforcement levers, define the specific action you will take.

Lever	Specific action and timing
Leader behavior: How will you visibly and consistently model the new standard?	
Response to deviation: What is your specific response when the standard is not met?	
Structural embedding: What system, process, or template change makes the new behavior easiest?	
Recognition: How specifically will you acknowledge exemplary implementation?	
Legacy retirement: What specifically will be retired to remove the path back to the old behavior?	

Part B: Resistance Diagnosis

If you are seeing resistance or reversion, use this diagnostic before deciding on a response.

Question	Your assessment
What specific behavior is not happening that should be?	
Is this a capability gap? (People lack the skill to implement the new behavior efficiently.)	
Is this a clarity gap? (People are uncertain what the new standard requires in their specific context.)	
Is this a conviction gap? (People are not persuaded the change is worth the effort.)	
Based on the gap type, what is the appropriate response?	

Part C: The Reinforcement Timeline

Define the specific reinforcement activities for each phase of implementation.

Phase	Planned reinforcement activities
Weeks 1–3: Adoption phase. Intensive modeling, instruction, and immediate feedback.	
Weeks 4–8: Vulnerability phase. Highest regression risk. Structural embedding, deviation response, early recognition.	
Months 3–6: Consolidation phase. Results become their own reinforcement. Identify and share early wins.	
Months 6–12: Standardization phase. Embed in processes, metrics, and onboarding.	
What leading indicator will tell you early whether the change is taking hold?	

Part D: The Regression Check

Use this quarterly to assess whether a change that was launched is holding.

Question	Current State
Is the new behavior being practiced consistently across the team, or only by some members?	
Have any deviations gone unaddressed in the last 30 days?	
Is the legacy infrastructure (templates, processes, metrics) that supported the old behavior still accessible?	
Is the change being referenced in regular leadership communications and reviews?	
Overall regression risk (Low / Medium / High) and primary driver:	

Before moving to Chapter 18, confirm:

- ☐ You have defined specific actions for all four reinforcement levers for a current or upcoming change.
- ☐ You have identified the legacy infrastructure that needs to be retired to prevent regression.
- ☐ You have built a reinforcement timeline covering all four implementation phases.
- ☐ You have applied the resistance diagnosis to any current reversion and identified the gap type.

FIELD GUIDE TOOL #18

The Sustainability Audit

Chapter 18: Ownership Endurance: Protecting the Energy

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess the endurance of ownership in your current team or organization. Complete it quarterly. The signals of erosion are easier to address early than late.

When to use it. Best used quarterly and whenever the team’s initiative or decision quality seems to be declining.

Part A: Capacity Assessment

For each team member, assess current scope against available capacity.

Team member	Active responsibilities (list all)	Capacity assessment (Sustainable / At limit / Over limit)
1.		
2.		
3.		
4.		
5.		
6.		

Part B: The Closure Inventory

List items that have been completed, embedded, or resolved but have not yet been explicitly named as finished.

Item	Closure action needed
1.	
2.	
3.	
4.	
5.	
What specifically will you say to declare each of these finished?	

Part C: The Erosion Signals

Based on what you have observed in the last 60 days, rate each signal on a scale of 1 to 5: 1 = Not present, 2 = Rare / faint signal, 3 = Occasionally observed, 4 = Frequently observed, 5 = Clearly present.

Erosion signal	Rating (1–5) and evidence
Decision quality: more hedging, qualification, and requests for confirmation than six months ago	
One-on-one quality: more backward-looking updates, less forward-looking ownership thinking	
Initiative frequency: fewer unprompted proposals, ideas, and self-directed improvements	
Energy quality: visible engagement declining even as performance metrics hold	
Overall erosion assessment (Low / Medium / High):	

Part D: The Endurance Plan

Based on your assessment, identify the structural actions required to restore or sustain ownership endurance.

Discipline	Specific action needed and owner
Priority limitation: What needs to come off the plate before anything new is added?	
Visible closure: What needs to be explicitly named as finished?	
Reinforce before reinvent: Is any current initiative ready to be declared standard practice?	
Cadence over urgency: Which meetings or rhythms need to be restored or restructured?	
Leadership restraint: Where are you intervening when you should be supporting?	

This is the final field guide tool. Before closing the book, confirm:

- ☐ You have assessed capacity honestly for each team member.
- ☐ You have named at least three things that can be explicitly closed.
- ☐ You have rated the four erosion signals against recent observation.
- ☐ You have identified at least one structural action for each of the five endurance disciplines.
- ☐ You have a committed date for the next sustainability audit.

Tool Log

Record each tool you run. A tool completed once is a baseline. A tool completed quarterly is a development practice.

Date	Tool #	Situation	What it surfaced	Committed action and date



If you left tomorrow, what would your organization be able to do that it couldn't do before you arrived?

These worksheets accompany *The Systems-Building Leader: A Field Guide for Developing Organizational Systems that Deliver Sustainable Value* by Walter E. Fick. Readers may print and copy them for use within their own team or organization.

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