

Process Excellence Checklists By Regina Clark, CSP

1. Are you an effective role model for your employees?	Yes	No
2. Do you routinely recognize/reward your employees?	Yes	No
3. Do you know everyone's name that you work with?	Yes	No
4. Do you make your employees feel valuable?	Yes	No
5. Do you take the time to teach employees how to do things?	Yes	No
6. Do you accept change easily?	Yes	No
7. Have you read any books on leadership within the last 3 months?	Yes	No
8. Do you think of ways to make processes better every day?	Yes	No
9. Do you question why things happen the way they do?	Yes	No
10. Are you dissatisfied with the way things work?	Yes	No
11. Do you consistently measure results?	Yes	No
12. Do you know who your customers are?	Yes	No
13. Do you know what your customers want?	Yes	No
14. Are you good at negotiating for time & resources?	Yes	No
15. Are you pleasant & positive every day?	Yes	No
16. Are you good at facilitating meeting?	Yes	No
17. Do you think that everything at work is a process?	Yes	No
18. Do you believe that every process can be improved?	Yes	No
19. Do you challenge the system?	Yes	No
20. Are your actions tied to the organizations goals?	Yes	No
21. Do you adjust your leadership style for the situation?	Yes	No

Each yes is worth 5 points.

80-105 points You're on your way to being a Process Excellence Leader

60-79 points You have some opportunities to improve your daily interactions

40-59 points You are stuck in your ways and that's not good!

0-39 points You are clueless when it comes to process excellence

Process Excellence Communication Checklist

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|---|-----|----|
| 1. Do you remember people's names when you meet them? | Yes | No |
| 2. Do you rehearse presentations? | Yes | No |
| 3. Do you use clear and concise language when you communicate? | Yes | No |
| 4. Do you think about the audience before developing a presentation? | Yes | No |
| 5. Do you adjust your language for the audience? | Yes | No |
| 6. Do you consistently make eye contact when communicating with others? | Yes | No |
| 7. Do you ask clarifying questions during conversations? | Yes | No |
| 8. Do you use active listening skills when having a conversation? | Yes | No |
| 9. Do you consistently think before you speak? | Yes | No |
| 10. Do you use professional, calm sounds and tones? | Yes | No |
| 11. Do you write clear, concise reports and updates? | Yes | No |
| 12. Do you write using an active voice? | Yes | No |
| 13. Do you make others feel comfortable? | Yes | No |
| 14. Do you use email selectively? | Yes | No |
| 15. Do you edit your written work? | Yes | No |
| 16. Do you look up a word when you don't know the meaning? | Yes | No |
| 17. Do you own any books on business writing? | Yes | No |
| 18. Have you been videotaped delivering a presentation? | Yes | No |
| 19. Do you ask for feedback after a presentation? | Yes | No |
| 20. Do you make adjustments to your speaking/writing when communicating to a culturally diverse audience? | Yes | No |
| 21. Do you have a communication role model or mentor? | Yes | No |

Each yes is worth 5 points

80-105 You are an effective communicator most of the time

60-79 There are a few areas that you need to pay attention to

40-59 You are not pushing yourself to develop better communication skills

0-39 You need help!

Left Brain Leverage

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Note: If you have not been videotaped delivering a presentation, you must plan to do it. Remember what matters gets measured. Watching yourself on videotape is one way to measure your effectiveness as a communicator!

Process Excellence Networking Checklist

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|--|-----|----|
| 1. Do you belong to any professional organizations or associations? | Yes | No |
| 2. Do you attend any of the monthly meetings or conferences? | Yes | No |
| 3. Do you have a list of people that you want to meet to advance your career? | Yes | No |
| 4. Have you presented at any Six Sigma or Lean national conferences? | Yes | No |
| 5. Have you met anyone new during the past six months
that can assist you with your professional development? | Yes | No |
| 6. Do you volunteer to be on committees outside of work? | Yes | No |
| 7. Do you know people in other departments by name? | Yes | No |
| 8. Do you have lunch with different people? | Yes | No |
| 9. Do you know the current business strategies? | Yes | No |
| 10. Are you comfortable conversing with Senior Executives? | Yes | No |
| 11. Do people within the organization know you? | Yes | No |
| 12. Do you add value to any teams? | Yes | No |
| 13. Do you share your expertise with others? | Yes | No |
| 14. Are you involved with your Alumni Association? | Yes | No |
| 15. Are you involved in your community? | Yes | No |
| 16. Are you involved in any civic organizations?
(Lions, Kiwanis, Rotary, Chamber of Commerce) | Yes | No |
| 17. If you lost your job today, are there at least ten people that
you could reach out to that would help you find a new opportunity? | Yes | No |
| 18. Do you serve on any Board of Directors? | Yes | No |
| 19. Do you share Process Excellence successes daily? | Yes | No |
| 20. Do you write notes to thank people when they do something for you? | Yes | No |
| 21. Do you regularly attend and support company functions
(holiday party, barbeque, toy drive)? | Yes | No |

Each yes is worth 5 points

80-105 points Great job! You understand the power of having a strong network.

60-79 points You're doing some things right. You might need to manage your time better to fit in more strategic networking.

40-59 points Take action now to build a stronger network

0-39 points You don't have a clue. Get out of your comfort zone and start meeting people.

Left Brain Leverage

Process Excellence Training Checklist

1. Are you an effective facilitator?	Yes	No
2. Are you an effective presenter?	Yes	No
3. Are you a great listener?	Yes	No
4. Do you like interacting with people?	Yes	No
5. Do you know who Malcolm Knowles is?	Yes	No
6. Are you organized?	Yes	No
7. Are you good at managing time?	Yes	No
8. Do you know what participant centered learning is?	Yes	No
9. Are you technically competent with all of the Six Sigma and Lean tools?	Yes	No
10. Do you like to have fun?	Yes	No
11. Are you creative?	Yes	No
12. Are you aware of intellectual property ownership?	Yes	No
13. Are you familiar with Adult Learning Theory?	Yes	No
14. Have you read <i>Creative Training Techniques</i> by Robert Pike?	Yes	No
15. Do you have a collection of stories and examples to use with every training module?	Yes	No
16. Do you have any experience with scoping projects?	Yes	No
17. Do you know the difference between a good project and a terrible project?	Yes	No
18. Do you understand the strategic business issues?	Yes	No
19. Do you like to travel and meet new people?	Yes	No
20. Do you like to coach others?	Yes	No
21. Do you know how to calculate an ROI for training dollars?	Yes	No

Each yes is worth 5 points

80-105 points You are going to be a fabulous trainer! Don't wear yourself out.

60-79 points You are moving in the right direction. Co-teach with a more experienced trainer when you begin.

40-59 points Training is not the same as lecturing. Attend a Train the Trainer if one is available. Read *Creative Training Techniques* by Robert Pike.

0-39 points Are you sure that you are the right person to train? You need a lot of development.

Left Brain Leverage

Process Excellence Negotiation Checklist

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|---|-----|----|
| 1. Do you like to negotiate? | Yes | No |
| 2. Do you aim for win/win situations? | Yes | No |
| 3. Are you willing to compromise? | Yes | No |
| 4. Are you comfortable communicating with Sr. Executives? | Yes | No |
| 5. Do you often think of alternatives or contingency plans? | Yes | No |
| 6. Have you read any books on negotiation? | Yes | No |
| 7. Are you good at planning for conversations? | Yes | No |
| 8. Are you comfortable with silence? | Yes | No |
| 9. Do you possess internal power? | Yes | No |
| 10. Do you anticipate where someone else is coming from during a negotiation? | Yes | No |
| 11. Are you patient? | Yes | No |
| 12. Do you take to time to understand issues? | Yes | No |
| 13. Are you always crystal clear about what you want? | Yes | No |
| 14. Are you comfortable resolving conflicts? | Yes | No |
| 15. Do you have experience making concessions? | Yes | No |
| 16. Are you willing to walk away? | Yes | No |
| 17. Do you have a list of good negotiating questions? | Yes | No |
| 18. Are you comfortable taking calculated risks? | Yes | No |
| 19. Do you ask good questions? | Yes | No |
| 20. Do you learn from your mistakes? | Yes | No |
| 21. Do you treat people the way they want to be treated? | Yes | No |

Each yes is worth 5 points

80-105 points You're on your way to being a fantastic negotiator.

60-79 points You have some improving to do, but you are not hopeless.

40-59 points Put yourself in negotiation situations and analyze what you do well and where you can improve.

0-39 points You have a lot to learn!

Leading Change Checklist

When it comes to leading change, most of the questions can be answered with “it depends”. Do your best to select a yes or no answer based upon your behavior most of the time.

1. Do you look forward to change?	Yes	No
2. Do you like change?	Yes	No
3. Are you familiar with the Grieving Cycle?	Yes	No
4. Do you take risks?	Yes	No
5. Do you consistently ask others for input before making a change?	Yes	No
6. Do you actively get support before implementing change?	Yes	No
7. Are you aware of how other people react to change?	Yes	No
8. Do you adjust your leadership style for different situations?	Yes	No
9. Do you provide timely feedback to others?	Yes	No
10. Are you honest about the bad news during change?	Yes	No
11. Do you communicate often and in a variety of ways?	Yes	No
12. Do you prefer face to face communication?	Yes	No
13. Do you like coaching others to succeed?	Yes	No
14. Are you good at breaking down barriers?	Yes	No
15. Do you challenge the current system?	Yes	No
16. Do you hold people accountable for their behavior?	Yes	No
17. Do you communicate a goal when leading a change initiative?	Yes	No
18. Do you tell people what's in it for them during change?	Yes	No
19. Do you look for opportunities to involve others during change?	Yes	No
20. Do you actively listen to others during change?	Yes	No
21. Are you available during change?	Yes	No

Each yes is worth 5 points

80-105 points You're on your way to being an effective change agent. Keep up the good work!

60-79 points You have some improving to do, but you are not hopeless. Work on improving your communication efforts.

40-59 points You need to find a mentor or role model that can help you when leading change.

0-39 points You have a lot to learn! Change is not about you, it's about influencing others through honest, open communication.

Left Brain Leverage

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Coaching Others Checklist

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|---|-----|----|
| 1. Do you like to develop others? | Yes | No |
| 2. Do you know the difference between coaching and counseling? | Yes | No |
| 3. Do you know what an EAP* is? | Yes | No |
| 4. Do you take time to prepare for a coaching discussion? | Yes | No |
| 5. Do you think of how the other person is going to respond to coaching? | Yes | No |
| 6. Do you give feedback that is specific? | Yes | No |
| 7. Do you give feedback in a timely manner? | Yes | No |
| 8. Do you create a motivating environment during team meetings? | Yes | No |
| 9. Do you help project team members develop new skills? | Yes | No |
| 10. Are you good at following up with others? | Yes | No |
| 11. Do you look for a private place to coach others? | Yes | No |
| 12. Do you give spontaneous positive feedback when you see someone doing something great? | Yes | No |
| 13. Do you ignore rumors and communicate using facts? | Yes | No |
| 14. Do you consistently reward and recognize team members? | Yes | No |
| 15. During a coaching discussion, | | |
| a. do you describe the impact of the behavior on other? | Yes | No |
| b. do you end on a positive note? | Yes | No |
| c. do you focus on performance, not personality? | Yes | No |
| d. do you limit interruptions? | Yes | No |
| e. use empathy? | Yes | No |
| f. avoid blaming or judging? | Yes | No |
| g. encourage joint problem solving? | Yes | No |

Each yes is worth 5 points

80-105 points You're on your way to being an effective coach. Keep up the good work!

60-79 points You have some improving to do, but you are not hopeless. Spend more time planning your coaching discussions.

40-59 points You need to find a mentor or role model that can help you when coaching others.

0-39 points You have a lot to learn! Write down the characteristics of a good coach that you have worked with. Use the list as a guide to develop some skills.

*Many organizations offer professional counseling services through an EAP (Employee Assistance Plan) for serious issues such as substance abuse counseling, marital counseling, etc.

Left Brain Leverage

Resolving Conflict Checklist

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|---|-----|----|
| 1. Do you resolve conflicts in a timely manner? | Yes | No |
| 2. Have you read any books on conflict resolution? | Yes | No |
| 3. Do you believe most conflicts can be resolved? | Yes | No |
| 4. Have you been married for more than 15 years? | Yes | No |
| 5. Are you good at resolving conflicts? | Yes | No |
| 6. Do you evaluate problems to determine what the tension is really about? | Yes | No |
| 7. If you have a difference of values with another, do you try to understand the other person's value system? | Yes | No |
| 8. Do you discuss problems when things are calm rather than when emotions are high? | Yes | No |
| 9. Do you agree on ground rules for discussing a problem before attempting to resolve differences? | Yes | No |
| 10. In any conflict, do you deal with emotions first, then try to solve problems? | Yes | No |
| 11. Do you create a plan when resolving conflict? | Yes | No |
| 12. Do you know what outcome you desire during conflict resolution? | Yes | No |
| 13. When resolving conflict, do you: | | |
| a. use appropriate body language and tone of voice? | Yes | No |
| b. use active listening? | Yes | No |
| c. use "I" statements when stating your point of view? | Yes | No |
| d. avoid name calling and sarcasm? | Yes | No |
| e. allow the other person to state their point of view without interrupting? | Yes | No |
| f. use brain storming techniques to solve problems? | Yes | No |
| g. stay focused on resolving the conflict? | Yes | No |
| h. remain calm? | Yes | No |
| i. use negotiation techniques? | Yes | No |

Each yes is worth 5 points

80-105 points You're great at resolving conflict. Keep up the good work!

60-79 points You have some improving to do, but you are not hopeless. Spend more time planning your conflict resolution approach.

40-59 points You need to assertively resolve conflict. Don't avoid conflict, it often gets worse as time passes.

0-39 points You have a lot to learn! Stay calm and focused and learn some techniques.