



Leads

TRAINING GUIDE



Making Leaders at Work

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**Brigham Young University-Idaho [...]
Its mission is to develop disciples of
Jesus Christ who are leaders in their
homes, the Church, and their
communities.**



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Introduction

Leads play a crucial role in the strategic success of the Student Records and Registration (SRR). They serve as the bridge between coordinators and specialists, ensuring that the vision and objectives of the Registration Unit and the entire office are effectively communicated and implemented. Leads are responsible for motivating and guiding their teams, setting the tone for productivity, and fostering a positive work environment.¹

A well-prepared lead can anticipate challenges, develop solutions, and implement practices that drive improvement. To do this leads need to embody the values and standards of the Student Records and Registration, help shape the organizational culture, and ensure that team members align with the mission and goals of our office. In addition to these responsibilities, it is important to recognize how our roles align with the mission of BYU-Idaho. Our university is committed to building leaders in their homes, communities, and the Church. As part of the BYU-Idaho community, it is important that we strive to accomplish this through our professional time at this university and ultimately in our personal lives.

Brigham Young University-Idaho [...] Its mission is to develop disciples of Jesus Christ who are leaders in their homes, the Church, and their communities.

By participating in this training, leads will not only enhance their leadership skills but will also contribute to a larger purpose. The goal of this training is to prepare them to become effective leaders and provide them with the tools and knowledge necessary to lead with integrity, compassion, and excellence.

(1) Clarkson College Student Government Association. (n.d.). Leadership training manual. Clarkson College. <https://www.clarksoncollege.edu/default/assets/file/studentorganizationhandbook.pdf>

**Daily
Responsibilities
and Standards**

Role Clarity and Responsibilities

Establishing clarity in your role will ensure that your team recognizes your role and your specific duties. As a lead, you may have found there was no specification as to what your role implied which may have led you to follow other leads' steps. However, it is important to define them to ensure you are efficient in your role.²

Daily Tasks

- Overseeing team operations and ensuring accuracy in registration and course scheduling.
- Providing feedback, support, and training to team members.
- Ensuring prompt and accurate responses to emails, tickets, and phone calls.
- Performing monthly one-on-ones with specialists to discuss goals, progress, and any issues.
- Auditing all unit-related activities to ensure the accuracy of your specialists.
- Communicating regularly with the coordinator.
- Assigning tasks based on priority or your coordinator's requests.
- Reviewing transcript changes and ensuring contacts have been made if you are on the morning shift.

In addition to defining daily tasks, it is important to ensure that all team members adhere to the Student Records and Registration standards. Every employee will review these standards upon becoming a specialist, however, you can continuously review them with your team.

Leads must ensure that all specialists are aware of, and comply, with SRR's policies, and guidelines. They must also lead by example, demonstrating a commitment to these standards in their behavior and decision-making.

(2) Silbert, D. (2024, June 12). How to create stronger role clarity for your team. The Predictive Index. <https://www.predictiveindex.com/blog/how-to-create-stronger-role-clarity-for-your-team/>

Team Management Skills

Techniques for Effective Time Management

Effective time management will help you maximize productivity and achieve goals. Leads should implement and teach various techniques to help team members manage their time efficiently. While you cannot control time you can learn to utilize it effectively.³ Some of these techniques include:

Prioritization



Prioritize tasks based on importance and urgency to focus on the most crucial activities.⁴ For instance, depending on the time of the semester certain areas will take priority over others.

Task Batching

Grouping similar tasks to improve focus and efficiency.⁵ For instance, handle emails depending on who they come from.



Time Blocking



Allocating specific time slots for different tasks throughout the day to ensure focused and uninterrupted work periods.⁵ Assign team members to specific areas for set periods before moving to other tasks.

Setting Deadlines

Establishing clear deadlines for tasks and projects to create a sense of accountability.⁴ This will encourage your team and yourself, to complete tasks in a timely manner.



(3) Office of the Spokesman, U.S. Department of State. "Why Time Management?" State.gov, U.S. Department of State, 2009–2017, <https://2009–2017.state.gov/m/a/os/64932.htm>. Accessed 21 June 2024.

(4) Landry, R. (2023, September 14). The Ultimate Guide to Time Management: 10 strategies for better productivity. Practical Management. <https://practical-management-skills.com/time-management/guide-to-time-management/>

(5) Martins, J. (2024, February 12). 18 time management tips to boost productivity [2024] . Asana. <https://asana.com/resources/time-management-tips>

Prioritization and Delegation Strategies

Delegation refers to transferring responsibility for specific tasks to your team. Effective prioritization and delegation ensure that your team is working towards our office's common goal and completing the assigned tasks. As a lead, you must be able to assess the importance of tasks and allocate resources accordingly.⁶

1

Evaluating Task Importance

Assess tasks based on their impact on the unit's goals and outcomes. Prioritize tasks with imminent deadlines or those assigned by the Coordinator.

2

Delegating Appropriately

Assign tasks based on team members' skills, experience, and workload. This includes giving certain specialists tasks that will help them learn more about the process involved.

3

Monitoring Progress

Regularly check on delegated tasks to ensure they are on track and provide support as needed. This can be done by auditing emails, listening to calls, etc., to understand your members' strengths and weaknesses without micromanaging.

Effective Team Coordination

Effective team coordination is crucial for achieving collective goals and ensuring smooth operations.⁷ In order to ensure your team works efficiently through the previous practices you need to exercise team coordination to bring these practices together to create a cohesive and productive environment.

(6) Landry, L. (2020, January 14). How to delegate effectively: 9 tips for managers. Harvard Business School Online. <https://online.hbs.edu/blog/post/how-to-delegate-effectively>

(7) An Hour With A Manager. (2024, April 9). Team coordination: Ensuring smooth collaboration for cohesive efforts. LinkedIn. <https://www.linkedin.com/pulse/team-coordination-ensuring-smooth-collaboration-8v1vf/>

Regular Team Meetings

To ensure alignment on priorities and deadlines gather your team at the beginning of your shift to delegate tasks, communicate priorities, and resolve any questions they may have.



Clear Communication Channels

Establishing and maintaining efficient communication will keep your team well informed and facilitate easy sharing of updates. Creating a Teams chat will help refer information to all members.

You should also strive to create channels with other leads and your coordinator. Regularly keep them updated on what you and your team have done, or on any information you have received.



By integrating these practices you can ensure your team works seamlessly towards common objectives and the overall success of the Student Records and Registration.

Goal Setting

Aligning individual goals with SRR's goals is essential for creating a cohesive and motivated team.¹ As a lead, it's crucial to ensure that each team member understands how their personal goals contribute to the broader larger goals of our office. Communicate the SRR's mission, vision, and strategic priorities to ensure they understand how their roles contribute to these goals.

Setting SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals is an effective way to provide clear direction and motivation for team members.¹

S pecific Define clear and specific goals that outline what needs to be achieved.

M easurable Establish criteria to measure progress and success.

A chievable Set realistic goals that are attainable given the resources and constraints.

R elevant Ensure goals are aligned with broader organizational goals and priorities, in this case SRR's.

T ime-bound Set deadlines for achieving the goals to create a sense of urgency.

Leadership Development Principles

Self-awareness

Tools and Techniques for Self-assessment

Self-awareness is a critical component of effective leadership since it contributes to guiding one's personal and professional development. It involves understanding one's strengths, weaknesses, values, and impact on others.⁸ You can develop self-awareness through various techniques:

Self-Reflection

Regularly take time to reflect on your thoughts, feelings, and experiences. Journaling can be useful to document these reflections and learn about your behavior and decision-making processes.

Feedback from Others

Seek feedback from your team, your coordinator, and others. You will learn how to do this later on. Honest feedback can provide valuable perspectives on your strengths and your areas of improvement.

Identifying personal strengths and weaknesses is essential for personal growth and development. You should also strive to guide team members in recognizing their unique abilities and areas for improvement. This can be achieved through strength-based assessments, through auditing them you can identify them and through one-on-ones, you will be able to make them aware of them. You will learn later in this training about the importance of developing personalized development plans that can focus on addressing weaknesses and improving their strengths even more.

Continuous Improvement

Continuous improvement is a vital principle for leadership development to enhance your skills and increase your effectiveness as a lead.⁹ It's important to adopt a mindset of lifelong learning, which means you need to continuously seek opportunities to expand your knowledge and skills.

(8) Cecchi-Dimeglio, P. (2024, February 20). How self-awareness elevates leadership effectiveness. Forbes.

<https://www.forbes.com/sites/paolacecchi-dimeglio/2024/02/14/how-self-awareness-elevates-leadership-effectiveness/>

(9) Parsons, L. (2024, January 17). Why is professional development important?. Professional & Executive Development | Harvard DCE.

<https://professional.dce.harvard.edu/blog/why-is-professional-development-important/>

Stay Informed

Keep up-to-date with SRR's process, guidelines, and practices, as well as other offices' since their policies may directly affect ours.

Professional Development

Participate in training and courses to enhance your leadership abilities, both within and outside SRR. Remember, this is not simply a student job, but it is a stepping stone to your professional career.

Skill Development

Focus on developing essential skills that affect your leadership. This could include communication, conflict resolution, planning, etc.

Seek Mentorship

Find a mentor who can provide you with invaluable guidance and support in your leadership journey. A mentor can help you navigate challenges and offer insights based on their experiences.

Communication Structures

Effective Strategies for Communication

Effective communication is the cornerstone of successful leadership because it creates trust and collaboration.¹⁰ Implement strategies to ensure clear, transparent, and open communication within their teams. As you have read before, it is important to establish lines of communication. However, once you have done this you need to learn how to be a good communicator. Here are some key strategies for improving your communication skills as a lead.

Develop Active Listening Skills

Active listening is crucial for understanding your team's needs, concerns, and ideas. Make sure to engage fully in any conversation with your team, and focus on their message.¹¹ Show that you are listening by responding thoughtfully and asking questions to better understand them.

(10) Why communication is essential to effective leadership. (2023, August 9). <https://lpsonline.sas.upenn.edu/features/why-communication-essential-effective-leadership>

(11) Social and leadership training course manual. USAID. (2020). https://pdf.usaid.gov/pdf_docs/PA00X3G1.pdf

Enhance Clarity and Conciseness

Being clear and concise can help you avoid misunderstandings and ensure your message is understood.¹² Be direct and get to your point quickly, however, make sure to organize your thoughts before you communicate either verbally or written. This could be especially relevant when assigning tasks or training.

Conflict Resolution

When addressing challenging topics with your team, which could include their performance, it is important that you first try to identify the root cause of the conflict. Think about what might be causing the conflict, and also think about the person behind them, empathy is a key component here.¹⁰ Talk to them and listen to understand what could be causing the conflict. Stay impartial and focus on finding a solution together.¹³ Express your interests and find theirs as well to reach a solution.

Effective Communication with Supervisors

As the bridge between specialists and coordinators, it is not only important that you learn how to communicate effectively with your team, but also with your coordinator. As a lead, your ability to communicate with your supervisor can impact your leadership as this will ensure your efforts and tasks are aligned with SRR's goals.¹⁰

Build a Professional Relationship

In order to develop a strong professional relationship with your supervisor there are several things that can help you. As the lead of your team you should be an example of a good employee, therefore, showing reliability can help your coordinator know that you are the person who can lead a team effectively. Consistently meet deadlines and fulfill your responsibilities. Demonstrate respect for your coordinator's time, such as listening to her feedback, being punctual, responsible, etc.¹⁴

(12) Team, W. (2023, July 27). Clear Communication in the Workplace: The Key to Organizational Success.

<https://www.wrike.com/blog/communication-workplace-organizational-success/>

(13) 15 tips for effective communication in leadership. CCL. (2023, January 27). <https://www.ccl.org/articles/leading-effectively-articles/communication-1-idea-3-facts-5-tips/#:~:text=It's%20tempting%20to%20ignore%20conflicts,before%20coming%20to%20a%20conclusion.>

(14) Russo, M., Morandin, G., & Bergami, M. (2023, July 27). What you need to build a good relationship with your new boss. Harvard Business Review. <https://hbr.org/2021/09/what-you-need-to-build-a-good-relationship-with-your-new-boss>

Prepare Coordinator Meetings

You will have multiple chances to meet with your coordinator, therefore, it is important to prepare for your meetings to ensure that your time together is effective and productive.¹³ Set clear objectives and define what you aim to achieve. This includes discussing progress, seeking advice, or addressing any challenges you may have.

Communicate Progress and Challenges

Regularly update your supervisor on your progress and any challenges you are facing. You need to keep them informed about key developments, achievements, and any issues that arise. At the end of your shift share with your coordinator and other leads any key developments during your shift or essential information they need to know.

Feedback Mechanism

Implementing Regular Feedback Meetings

Regular feedback meetings are essential for continuous improvement and development.¹⁰ Create a space with your team to be able to talk, get to know them, and discuss their progress as specialists.

- **Schedule Regular Check-ins:** Schedule regular one-on-one meetings with team members to discuss performance, progress, and areas for improvement.¹⁶ You can do this monthly or as you find it convenient. Depending on the situation and if there are any current issues you might want to increase their frequency.
- **Create a Safe Environment:** Create a safe and supportive environment where team members feel comfortable sharing their thoughts and receiving feedback. This will go hand in hand with good communication and being able to actively listen.

(15) Landry, L. (2019, November 14). 8 Essential Leadership Communication Skills: HBS Online. Business Insights Blog. <https://online.hbs.edu/blog/post/leadership-communication>

(16) Chowdhury, S., Hancock, B., & Williams, O. (2021, February 1). Unlocking the true value of effective feedback conversations. McKinsey & Company. <https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/the-organization-blog/unlocking-the-true-value-of-effective-feedback-conversations>

(17) Dagher, K. (2024, June 7). How to facilitate feedback meeting: 9 steps for leaders in 2024. Fellow.app. <https://fellow.app/blog/meetings/how-to-facilitate-an-effective-feedback-meeting/>

- **Use Structured Frameworks:** Create a structured framework or an outline of what your meeting will look like and what is it that you want to discuss with them.

Importance of Giving and Receiving Feedback

Giving and receiving feedback is a critical aspect of effective leadership because it helps you and your team grow.¹⁰ One-on-ones are the perfect environment to provide constructive feedback and address issues if needed.

- **Provide Constructive Feedback:** Offer specific, actionable, and balanced feedback that highlights both strengths and areas for improvement. As you get to know your team you will see what areas they can improve on.
- **Encourage Self-reflection:** Encourage team members to reflect on the feedback and ask them to identify their areas for growth. Immediately sharing what they can work on might hinder self-reflection opportunities.
- **Be Open to Feedback:** Demonstrating openness to receiving feedback from team members will help you become more self-aware as well as work on things that can make you a better lead.¹⁸ Specialists might be hesitant to share their feedback so if they are not willing to do this, you can begin by sharing your thoughts on what you think you could do better.

The Structure of a One-on-One

One-on-one meetings are a valuable opportunity for personalized feedback and development.¹⁸ Leads should structure these meetings to ensure they are productive and meaningful. This includes:

- **Setting an Agenda:** Establish a clear agenda that outlines the topics to be discussed.
- **Reviewing Progress:** Discuss their progress on goals and projects, and identify any challenges or obstacles.

(18) Tupper, H., & Ellis, S. (2023, April 27). How managers can make feedback a team habit. Harvard Business Review. <https://hbr.org/2023/04/how-managers-can-make-feedback-a-team-habit>

- **Providing Feedback:** Offer constructive feedback on performance, highlighting both strengths and areas for improvement.
- **Discussing Development Opportunities:** Explore opportunities for professional development and growth. There might be some areas they want to work on.

Performance Review Outline

- **Opening**
 - Get to know them (e.g. ask them about school, life, etc.)
 - State the purpose of the meeting
 - Overview of discussion points
- **Performance and Competency Assessment**
 - Summarize accomplishments, milestones, and overall performance
 - Evaluate previous set goals and progress
 - Encourage self-reflection (e.g., asking what they want to improve on)
 - Assess job-specific competencies (e.g., registration, course scheduling, petitions) and behavioral competencies (e.g., communication, teamwork, problem-solving)
- **Feedback and Discussion**
 - Discuss areas for improvement and set goals
 - Address specialist's questions and/or concerns
 - Ask for feedback on your performance (Self-reflect in front of them about your own personal areas of improvement)
- **Conclusion**
 - Summarize key points discussed
 - Confirm the next steps and announce a follow-up meeting

Initiatives as Leads

Creating a Culture of Inquiry and Growth

Encouraging curiosity and continuous learning is essential for fostering innovation and growth. Just as you strive to continue to learn and become a better lead and employee, it is also important to encourage your team to do so. By creating a culture of inquiry and growth, leads can inspire team members to continuously seek new knowledge and improve their performance.¹⁹

- **Promote a Learning Mindset:** Encouraging team members to approach challenges with curiosity and a willingness to learn. Sometimes providing your team with answers is part of your job, but posing self-reflecting questions they will learn more from it than if you answered immediately.
- **Provide Learning Opportunities:** Offering opportunities for team members to expand their knowledge and skills through training. This can be done through training sessions or daily delegation of tasks they are not as familiar with.

Fostering an environment where questions are welcomed and growth is prioritized is key to innovation and improvement. Leads should encourage open dialogue so their team feels comfortable asking questions and sharing ideas.

Developing Future Leaders

Mentorship and coaching are powerful tools for developing future leaders. Some of the specialists in your team right now might become leads in the future so it is important to coach them and train them so they have the sufficient knowledge and skills to one day acquire that role. It is important to learn to identify potential leaders among your team members. Once you do you can provide them with mentorship and coaching opportunities.²⁰ As a lead, most people will reach out to you as the main person with a lot of knowledge.

(19) Hoy, C. (2023, October 2). Creating a culture of continuous learning: The CLO's critical role. Chief Learning Officer - CLO Media. <https://www.chieflearningofficer.com/2023/10/03/creating-a-culture-of-continuous-learning-the-clos-critical-role/#:~:text=October%203%2C%202023&text=In%20an%20era%20where%20continuous,falls%20squarely%20on%20your%20shoulders.>

(20) McNeely, M., & Ehrenreich, M. (2024, January 8). How to adopt a coaching mentality and practice. Professional & Executive Development | Harvard DCE. <https://professional.dce.harvard.edu/blog/how-to-adopt-a-coaching-mentality-and-practice/>

You can take this time to refer people to your specialist to answer those questions and guide them if needed. Providing guidance, support, and feedback can help specialists develop their leadership skills.

If needed, and especially as they express interest or you know they have a lot of lead potential, you can create personalized development plans by outlining their goals and what steps are needed for them to achieve them. Investing in mentorship can nurture the next generation of leads and ensure the long-term success of the organization.

Innovation and Creativity

Being Proactive, Not Reactive

Being proactive rather than reactive is essential for driving innovation and achieving long-term success.²¹ The Student Record and Registration has focused on and mentioned before how important it is to be proactive. This means, not waiting until we can find an issue with our processes but anticipating them. Throughout the years, SRR has changed a lot, from the software used to the way we communicate, our processes, etc. Some of these changes have come from student employees. As we become more invisible as an office, you might see a decrease in the volume of tasks you have. That is why it is important to utilize our time to make SRR more efficient. The following is something you should do as a lead, but also encourage your specialists.

Anticipate Challenges

Identify potential challenges and opportunities before they arise. Innovation comes from people who use their imagination to solve problems.²²

Develop Strategies

Create strategies and plans to address anticipated challenges. It is important to note that sometimes issues are not problems, but opportunities for SRR to improve.

(21) Rey. (2024, April 18). Being proactive vs reactive in business: Which is better for Success?. Mister Independent. <https://misterindependent.com/proactive-vs-reactive-in-business/>

(22) Manning, A. (2024, January 8). 4 ways creative thinking drives professional success. Professional & Executive Development | Harvard DCE. <https://professional.dce.harvard.edu/blog/4-ways-creative-thinking-drives-professional-success/>

Encourage Proactive Thinking

Promoting a proactive mindset among team members, encouraging them to think ahead and take initiative on their projects. Let them come up with their proposals since they will be more motivated to do so than if you assign them some. By encouraging proactive thinking and innovation they will start to see the potential instead of the problem.²²

The Process of Project Creation

The process of project creation involves several key steps that ensure successful outcomes. You will find in this training a template for a project proposal.

Define Objectives

Clearly define the objectives and goals of the project.

Plan, Organize, and Present

Create a detailed project plan that outlines the tasks, timeline, and resources needed. Once you have a plan, you will need to present the project to the Registration Coordinator.

Execute and Monitor

Implementing the project plan and monitoring progress to ensure that objectives are being met.

Evaluate and Learn

Evaluate the project's outcomes and identify lessons learned to improve future projects.

Refer to the Project Proposal Template to learn how to develop a project.

Key Takeaways

Key Takeaways



Role and Importance of Leads

Leads are crucial for the strategic success of the SRR unit, bridging the gap between coordinators and specialists and fostering a positive work environment.



Clear Communication of Responsibilities

Leads must clearly define and communicate daily tasks, responsibilities, and performance expectations to ensure team members understand their roles and contributions.



Regular Team Coordination

Hold regular team meetings to align priorities and goals, establish clear communication channels, and foster a collaborative and supportive team environment.



Commitment to Continuous Improvement

Embrace lifelong learning by staying informed about SRR processes, participating in professional development opportunities, and seeking mentorship for guidance and growth.

Templates and Resources

One-on-One Meeting Agenda

OPENING

GET TO KNOW THEM

STATE PURPOSE

OVERVIEW OF MEETING

FEEDBACK

CONSTRUCTIVE FEEDBACK

SET GOALS

ADDRESS CONCERNS

ASK FOR FEEDBACK

ASSESSMENT

ACCOMPLISHMENTS

GOALS' PROGRESS

SPECIALIST' SELF-REFLECTION

ASSESSMENT COMPETENCIES

CONCLUSION

SUMMARIZE KEY POINTS

NEXT STEPS

Project Proposal Template

PROJECT TITLE			
SUBMITTED BY		PROJECT TYPE (E.G., TRAININGS, MEDIA)	
PROJECT START DATE		PROJECT END DATE	

SUMMARY

PURPOSE AND GOALS

PROJECT JUSTIFICATION (WHY)

SCOPE AND DELIVERABLES

METHODOLOGY

DEPARTMENTS NEEDED FOR COLLABORATION

TIMELINE AND EXPECTED COMPLETION DATE

Sources

Sources

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<https://www.clarksoncollege.edu/default/assets/file/studentorganizationhandbook.pdf>
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- (11) Social and leadership training course manual. USAID. (2020). https://pdf.usaid.gov/pdf_docs/PA00X3G1.pdf
- (12) Team, W. (2023, July 27). Clear Communication in the Workplace: The Key to Organizational Success. <https://www.wrike.com/blog/communication-workplace-organizational-success/>

(13) 15 tips for effective communication in leadership. CCL. (2023, January 27).

<https://www.ccl.org/articles/leading-effectively-articles/communication-1-idea-3-facts-5-tips/#:~:text=It's%20tempting%20to%20ignore%20conflicts,before%20coming%20to%20a%20conclusion.>

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<https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/the-organization-blog/unlocking-the-true-value-of-effective-feedback-conversations>

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(18) Tupper, H., & Ellis, S. (2023, April 27). How managers can make feedback a team habit. Harvard Business Review. <https://hbr.org/2023/04/how-managers-can-make-feedback-a-team-habit>

(19) Hoy, C. (2023, October 2). Creating a culture of continuous learning: The CLO's critical role. Chief Learning Officer - CLO Media. <https://www.chieflearningofficer.com/2023/10/03/creating-a-culture-of-continuous-learning-the-clos-critical-role/#:~:text=October%203%2C%202023&text=In%20an%20era%20where%20continuous,fall%20squarely%20on%20your%20shoulders.>

(20) McNeely, M., & Ehrenreich, M. (2024, January 8). How to adopt a coaching mentality and practice. Professional & Executive Development | Harvard DCE.

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