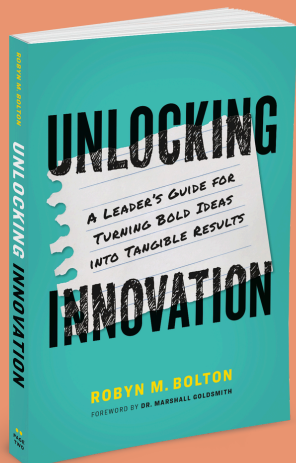




UNLOCKING INNOVATION

# LEADER'S NOTEBOOK

A companion for reflection  
and forward progress



ABC

[WWW.MILEZERO.IO](http://WWW.MILEZERO.IO)

# BUILD YOUR LEADERSHIP BEHAVIORS!

In **Unlocking Innovation**, you learned the ABCs of innovation and followed Hope, Faith, and Victor as they led innovation in their organizations. Now, it's time to write your own story.

## How to use this notebook

This is your notebook. Your companion. Your space to reflect, plan, and grow into the innovation leader your team and organization needs.

**Get a pen.** Yes, a pen. Research shows that writing by hand engages different parts of your brain than typing, leading to deeper reflection and better retention. Plus, there's something powerful about putting pen to paper, making a physical mark that declares, "This is what I think" or "This is what I'll do."

**Make this your own.** This notebook follows the three-year journey outlined in the book, but don't feel constrained by that structure. Skip around. Return to exercises that resonate. Add your own questions and reflections.

## Be Honest

The pages that follow will ask you to examine yourself, your organization, and your leadership style with unflinching honesty. Some of your answers may surprise you. Some might make you uncomfortable. That's okay. Growth happens at the edge of comfort, and innovation leadership is all about growth.

## Make Time

If you're thinking: "I don't have time for this," remember that "I don't have time" means "It's not a priority." Your growth as an innovation leader is worth prioritizing. Start small. Block 15 minutes each week for reflection. Before you know it, this notebook will become an invaluable tool in your journey.



## ONE LAST THING

Keep this notebook close. Not just physically (though that helps), but mentally. Let it be a reminder that you're not alone on this journey. Every innovation leader faces challenges, doubts, and setbacks. What matters is how you learn from them.

Now, grab that pen. Your journey starts here.

And yes, you can have a cookie while you write. I still recommend chocolate chip.

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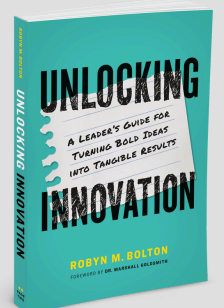
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For more information and free content,  
visit [UnlockingInnovation.co](http://UnlockingInnovation.co)

**YEAR**





# Your Instincts

**Who are you in your professional life?** What roles do you play? Remember to write down “role model” and “innovation leader” because you are both of those things now.

**Who are you in your personal life?** What roles do you play?

Write your answer here...

# Your Instincts

**What makes you, you?** Thinking about ALL the roles you play, what are the qualities, characteristics, mindsets, and behaviors that make you successful? If you have trouble coming up with a list, ask people to describe you and write down what they say (whether you agree with it or not).

**How might these things get in the way of doing something that is new, ambiguous, and uncertain?** For example, if you're a data-based decision-maker, you may find it challenging to make decisions without data or benchmarks.

**What might the opposite look like?** Don't worry (yet) about whether you will or won't do the opposite, just write down what the opposite might look like. Be sure that the opposite is also a positive trait. For example, if you're a data-based decision-maker, the opposite might be expanding your definition of acceptable data to include qualitative insights.

**What small changes will you make to be the opposite?** Change is hard. Becoming the opposite of who you are is impossible. But small changes can make a big difference!

Pick three qualities or behaviors that make you who you are but that may need to change so you can be a successful innovation leader. Write down what you will change, how you'll support the change, and who will hold you accountable.

For example, if you want to rapidly make decisions with little data, one change you can make is agreeing to the data needed before starting an experiment and asking the team lead to remind you of this commitment at every progress update meeting.

# Your Organization's Identity

**Who are we and what do we do?** Your organization has an identity that is more than its Mission statement. Its identity reveals itself in people's daily behaviors, priorities, and decisions. It's captured in how people respond to "what do we, as an organization, do?"

# Your Organization's Identity

**What type of innovation are we willing to pursue?** Select 1 of the options below.

- Identity Enhancing:** Innovations that strengthen and reinforce the organizational identity, core capabilities, and activities. These innovations are consistent with existing industry and market definitions, even if they may feel radically different from what we do today.
- Identity Stretching:** Innovations that stretch and expand our understanding of our identity. These are important because our current business is being significantly impacted by changes in consumer behavior, regulations, technology, geopolitics, economic conditions, or competitive dynamics.
- Identity Challenging:** Innovations that threaten the organization's identity and, if successful, would redefine the organization and the industries and markets within which it operates

**Why are we willing to pursue this type of innovation and not the other types?** No single innovation team can pursue both types of innovation. If you say yes to one, you are saying no to the other. Write down your reasons.

**BONUS:** ask your key stakeholders for their input on this question. If there's a misalignment, start working now to build an agreement.

# Your Innovation Choice

**Who do you choose to be?** Look back at your answers to the previous questions, especially the one about what the opposite could look like for you. Now imagine who you want to be in three years. How do you want people to describe you?

# Your Innovation Choice

**What will you do to become this person?** There are many things you could do and some things you would prefer to do. But that's not the question. What are the things you WILL do to achieve your goals. Focus on things that are in your control

**What won't you do?** Saying yes to something often means saying No to something else. So for every answer to the question above, think about what you need to say No to. The answers may be behaviors that you need to stop doing or they may be behaviors you never want to start. They may even be responsibilities, activities, or even roles that you need to transfer or delegate.



# How to Create Shared Values

**Shared values are the foundation for everything you and your team do.** They describe how you work with each other and with others outside your team, and behavioral norms to which you hold yourselves and each other accountable. Take the time to do this right.

**Shared values only work if their definition and use is shared.** If you create a draft and share it with the team, they'll nod, agree to it, and it will be just another file on the computer. If you delegate the creation to your team, it's just another To Do that takes time but they don't believe will result in any change. You and your team need to create this TOGETHER.

## **Plan 45 minute - 1 hour weekly meetings over 3-4 weeks to define your shared values**

### **1. Best team experience and Brainstorm:**

- a. Each person shares their best team experience from any part of their life (does not have to be work related) and reflects on what made it the best. Take notes.
- b. Ask each person to make a list of the things (activities, behaviors, styles) they need in order to operate at their best. Go around the room, share the lists, and discuss common themes. Collect everyone's list
- c. Between the first and second meeting, synthesize the key themes from the Best Team Experience and the Brainstorm. Create a document showing the key themes and mapping the themes to specific statements from Meeting 1

### **2. Discuss and Revise:** Share the synthesis with the team. Talk through each line, pausing to make sure that the inputs were correctly understood, answer questions, and make revisions. Send the updated and revised norms to the team within 24 hours.

### **3. Refine and Align:** Continue to discuss and refine the norms until everyone is in agreement and willing to commit and be held accountable to them. Consider creating two different artifacts: a simple one listing the values and a more detailed one that explains and describes how the value and norms come to life in your work

### **4. Role Model:** Discuss with the team the mindsets, actions, and behaviors that do and don't demonstrate these values and how you can and will celebrate role model behavior or address moments that fall a bit short.

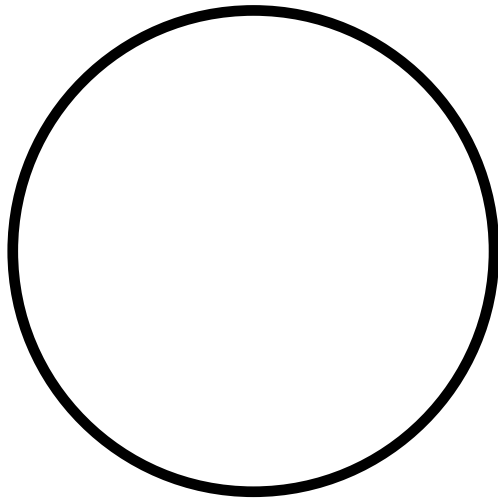
**YEAR**

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# Look Back

**What were your Year 1 goals?** Look back at your goals and aspirations from last year. What were the mindsets and behaviors you wanted to amplify or change? What was the team you hoped to assemble and who were the stakeholders you planned to engage? What architecture did you want to set-up? What results did you hope to show?

**How did you spend your time?** The best way to know how you're spending your time is to see how you're spending your time. Below is the outline of a pie chart (the circle) and a partially completed key. First, complete the key by adding other activities you spent time on last year. Then, slice up the pie to represent what percentage of your time was spent on each activity. Be honest! No one will see this and only the truth will help you.



- Admin stuff (emails, expense reports, etc.)
- Presentations about innovation
- Working meetings with innovation team
- Meetings not related to innovation
- 
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**Reflect.** Does the pie chart above reflect your Year 1 priorities and goals? Why or why not?

**Plan.** If your pie chart perfectly reflects your priorities, way to go! You can skip this page and go to the next one. If you're like 99.99999% of people, your pie chart is not a perfect (or even remotely similar) reflection of your priorities. That's okay. You're learning.

Write down your answers to these questions:

- What surprises you about your pie chart?
- When you look at your pie chart, what makes you proud? Why?
- What would you like to change about your pie chart this year? Why?

# Look Around

**What were your Year 1 team goals?** Describe the team you aspired to create in Year 1. Who were the people on the team? What skills did they bring? What were the shared values you established? What were the progress and goals you planned to achieve?

# Your Team

**How is your team doing?** Reflect on how well (or not) your team is working. Is it making progress and delivering its goals? Why or why not?

**How is your team feeling?** Think about the team as a whole - is it united in pursuit of a common goal or are there cliques and factions forming? What's causing this dynamic? What, if anything, can you do to improve it.

Think about each individual member of your team. How do they feel? Are they energized, motivated? Are they realistic about what's possible and learning to navigate the organization? or are they frustrated and burned out? What's causing them to feel the way they do and what, if anything, can you do to improve their experience?

# Your Team

**Celebrate!** How will you recognize your team's accomplishments? How will you empower the team to recognize and thank each other? How will you all celebrate, recognize, and thank your allies and champions within and beyond your organization?

**Correct.** If you didn't achieve your goals in Year 1, how might the team operate differently to get back on track? If the team as a whole or specific individuals aren't feeling energized or motivated, what might you do to help?



**Plan.** Creating an action plan is tempting, but it's not time. Yet. If your team will be affected by a change, they should be involved in designing, debating, and making the change. That doesn't mean they must like or agree with the change, but their voices must be heard if you want them to act on it.

But right now, it's all about you. In the space below, answer these three questions:

- What might we **START** doing to be more effective and to enjoy our work together?
- What might we **STOP** doing that is ineffective, inefficient, or negative?
- What might we **CONTINUE** doing because it works and we enjoy it?

# Look Forward

**What is in and out of bounds for Year 2?** What do you hope to accomplish in Year 2? What must you accomplish? How will you measure these accomplishments? How do they align with other corporate priorities? What won't you do in Year 2 (and why)?

# Reconnect & Recommit as a Team

**Innovation is a team sport.** Get your team together at least once a year to reconnect and recommit to your shared values and goals. This session should be 1 day to provide plenty of time for discussion, planning, and being together as colleagues, teammates, and people. Be sure to schedule plenty of breaks and at least one leisurely meal together.

**Innovation is not a spectator sport.** This session needs to be action-packed, but don't confuse activity with achievement. Plan the experience before you plan the content.

- **How do you want people to feel at the end of the day?** The content for a session that leaves people feeling proud and inspired differs from the content that sends people home with focus and a sense of urgency.
- **What will be different because of this meeting?** What you say in the room doesn't matter if it doesn't translate to action outside of the room. What are the artifacts of this time together that will guide your actions this year and act as reminders and rallying points in the weeks and months after this session?
- **Who is participating, in what, and for how long?** Think very carefully about who should attend this session and the active role they will play (innovation is NOT a spectator sport). If senior executives want to attend, try to confine them to the beginning to "tally the troops" or the end to see the progress. If you want your cross-functional counterparts to attend, does it make sense to have them attend for half a day so you and your direct reports have dedicated time together?

**You're the team's coach, not the star player.** As much as possible, try to be a participant. Not the facilitator and not the Star on the Stage. To help you do that:

- **Bring in a facilitator who is not involved in your team, your work, or the agenda.** A neutral third party is able to say and do things that others can't.
- **Change activities every 20 minutes.** There's a reason that TED talks are 20 minutes or less - we tend to lose interest and focus if things stretch beyond that.
- **Make your team the stars.** Ask your team members to lead each agenda item. Provide them with a time limit and objective for the activity then let them design and deliver it.

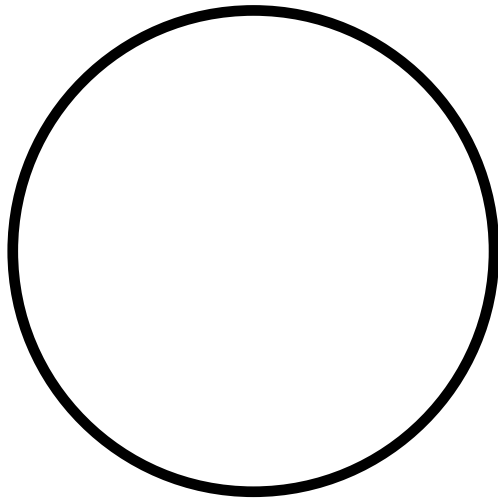
**YEAR**

**3**

# Look Back

**What were your Year 2 goals?** Look back at your goals and aspirations from last year. What were the mindsets and behaviors you wanted to amplify or change? What was the team you hoped to assemble and who were the stakeholders you planned to engage? What architecture did you want to set-up? What results did you hope to show?

**How did you spend your time?** The best way to know how you're spending your time is to see how you're spending your time. Below is the outline of a pie chart (the circle) and a partially completed key. First, complete the key by adding other activities you spent time on last year. Then, slice up the pie to represent what percentage of your time was spent on each activity. Be honest! No one will see this and only the truth will help you.



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**Reflect.** Does the pie chart above reflect your Year 2 priorities and goals? Why or why not? How does your Year 2 pie chart differ from Year 1? Why?

**Act.** Now it's time to commit. Change doesn't happen because we want it to or we need it to (if it did, we'd all be healthy, rich, and happy). It happens because we take action and make the change happen.

In the space below, answer these three questions:

- What will you **START** doing so that your time better reflects your priorities?
- What will you **STOP** doing (or delegate)?
- What will you **CONTINUE** doing?

# Look Around

**What were your Year 2 team goals?** What commitments did you make to each other and to the business at the start of this year? Which commitments were delivered and why? Which ones were harder or easier than expected? What did you learn about your team?




## Your Team

**How is your team doing?** What has changed about the work they're doing? What changed about how they do the work? Are they building new skills? Why or why not? How can you help their growth to continue, change, or accelerate?

# Look Forward

**What is your personal vision for the next 3 years?** What do you want to accomplish in the next three years, both personally and professionally? How do you want to spend your time and energy? How do you want to be known?



**What is your professional vision for the next 3 years?** What do you want your team to accomplish in the next three years? What results do you want them to generate? What role will innovation play in your company three years from now? How will your organization be different and better?

# Cement Your Legacy

**Stay present.** Your team needs you but not in the ways they used to. Continue to lead, coach, and support them when and how they need it by asking yourself these questions:

- **What can I delegate to my team now?** Channel your inner Queen Elsa (yes, that's a Frozen reference) and let it go. Even if it makes you nervous, give it to your team because they'll eventually have to do it when they're in your shoes.
- **What can I delegate in six months?** If your team isn't ready to take something on now, work with them to figure out what's needed so they can take it on in 3, 6, or 9 months. Then, commit to getting those things in place and take the lead on making them happen.
- **What are the things that only I can do?** I hate to break it to you, but this list is very short. It also has very little to do with your title or official roles and responsibilities. These are the things only you can do because of who you know and what you've learned.

**Prepare the next generation.** Look at your answers to the previous question because now we're going to work on how to share those items, too.

- **Who do I know that help me do what I do?** Some of these people will be obvious, like your boss or your cross-functional peers. But others will be less so, like that person in R&D that always has spare time to pull-together a prototype, or the lawyer who isn't afraid of the gray areas but keeps you from getting into real trouble.
- **Who are my top performers?** You know who your stars are, even (and especially) if they don't fit your organization's traditional definition of High Potential talent.
- **How can I help my top performers build relationships with my most important allies?** You have to go beyond an email intro and petty cash to fund a coffee date. Find ways for them to work together. Schedule lunch with your star and your ally and their star. Check in with both people every 2-4 weeks to make sure they're staying connected.

**Communicate early and often.** Remember that the moment you get sick of hearing yourself say something is the moment someone will hear it for the first time.

- **What is the ONE message people need to know and remember?** This message should be short, think an advertising tagline, and definitely no longer than a simple sentence (if you use a semi-colon, it's too long).
- **Am I saying it the same way every time?** Even the slightest variation, changing "a" to "the," will sound new and different to people. If you want your message to stick (and you do), say the same words, in the same order, every single time.
- **How can I say it when I'm not there to say it?** Find opportunities to make your message every present. Put it in your email signature. Teach others to repeat it. Make a poster.