UNDERSTANDING THE NEW WORKFORCE

Toolkit User Guide

A Practical Guide to Choosing and Using the 10 Leadership Tools

How to Use This Guide

The Leadership Toolkit gives you the worksheets. This guide explains how to use them. The two resources are designed to work together, but you do not need to use every tool or complete them in numerical order.

Start with the workforce or leadership problem in front of you. Choose the tool that best matches the situation, use this guide to understand the purpose and process, and then complete the corresponding worksheet in the Leadership Toolkit.

The objective is not to complete forms. It is to diagnose more accurately, challenge assumptions, strengthen leadership behavior, create clearer conversations, and improve follow-through.

Choose the Tool That Fits the Problem

If the problem is...	Start with...
You are tempted to blame a workforce problem on attitude, work ethic, pay, or a generation before diagnosing it.	1. Workforce Problem Diagnostic
A leader or team is very certain about why something is happening.	2. Assumption vs. Evidence Worksheet
You want to evaluate what employees actually experience from your leadership.	3. Six-Principle Leadership Self-Assessment
Motivation, engagement, initiative, or commitment appears to be declining.	4. Employee Motivation Diagnostic
A one-on-one needs to become a development conversation rather than a status update.	5. One-on-One Coaching Guide
A team has problems with trust, conflict, accountability, communication, or shared purpose.	6. Team Effectiveness Scorecard & Norms Builder
A performance issue requires a direct, fair, and supportive accountability conversation.	7. Accountability Conversation Planner
Employees are facing significant organizational change or uncertainty.	8. Change Communication Planner
You want to understand retention risk before an employee decides to leave.	9. Stay Interview & Retention Guide
Meetings create discussion but not enough ownership, deadlines, or execution.	10. Meeting-to-Execution Tracker

Some situations will require more than one tool. For example, a turnover problem may begin with the Workforce Problem Diagnostic, lead to the Employee Motivation Diagnostic, and then require Stay Interviews to test what leadership is learning directly from employees.

1. Workforce Problem Diagnostic

Purpose

Use this before deciding that a workforce problem is caused by attitude, work ethic, compensation, or a particular generation. Its purpose is diagnosis before prescription.

How to Complete It

- Define the symptom in observable terms. Describe what is happening without explaining why it is happening yet.
- Establish the size of the problem using available data, dates, departments, roles, or trends. A few memorable examples may not represent the larger workforce.
- Work through the possible causes one at a time. Rate each cause based on evidence rather than intuition.
- For every likely cause, identify both evidence for it and evidence against it. This reduces the risk of searching only for information that confirms your first explanation.
- Identify what information is still missing and what you would expect to observe if your leading explanation is actually correct.
- Choose the smallest reasonable action or test that can give you more information before launching a large solution.

What Good Use Looks Like

Good use looks like: You leave with a more precise explanation of the problem, competing causes that have been tested rather than assumed, and a proportionate next step.

Common Mistakes

- Starting with a solution and using the worksheet to justify it.
- Treating generational labels as causes instead of investigating working conditions, leadership, role design, or labor-market factors.
- Using anecdotes as if they were workforce data.
- Launching a major intervention before testing the leading explanation.

What to Do Next

Next step: Gather missing evidence or run the smallest reasonable test. Revisit the diagnostic after new information becomes available.

2. Assumption vs. Evidence Worksheet

Purpose

Use this when a leader or team has become very certain about why an employee, department, or workforce issue is occurring. The purpose is disciplined curiosity.

How to Complete It

- Write the conclusion you are currently leaning toward before trying to defend it.
- Under What We KNOW, record facts, data, direct observations, and documented events.
- Under What We THINK, record interpretations, explanations, beliefs, and judgments. These may be reasonable, but they are not the same as established facts.
- Under What We Are MISSING, identify unanswered questions, people you have not asked, and data you do not have.
- Identify what evidence would change your mind. If the answer is 'nothing,' you are no longer testing a conclusion.
- Use the bias check to look for overgeneralization, assumed intent, generational explanations, experience bias, and confirmation bias.
- Write a better question and identify the next information-gathering step.

What Good Use Looks Like

Good use looks like: You can explain what is known, what is interpretation, what is missing, and what evidence could reasonably cause you to revise your conclusion.

Common Mistakes

- Moving interpretations into the facts column because they feel obvious.
- Asking questions only of people likely to agree with you.
- Using the worksheet to prove the original conclusion instead of testing it.
- Refusing to identify evidence that could change your mind.

What to Do Next

Next step: Gather the missing information before making a consequential decision or labeling the employee, team, or workforce problem.

3. Six-Principle Leadership Self-Assessment

Purpose

The assessment measures six leadership principles: Trust, Communication, Sound Decision Making, Accountability, Developing People, and Execution. The emphasis is on what employees actually experience from you, not what you intend.

How to Complete It

- Rate each behavior from 1 to 5 based on your recent, observable leadership practice. Avoid rating your values or intentions.
- Use the Evidence / Example column. A rating without an example is easier to inflate or rationalize.
- Look for patterns within each principle rather than focusing only on individual items.
- Identify your strongest principle and the principle currently creating the most risk for your team.
- Choose one specific behavior to change over the next 30 days. Keep it narrow enough that employees could actually notice the difference.
- Repeat the assessment later using the same standard so you can compare behavior over time.

What Good Use Looks Like

Good use looks like: You identify a small number of leadership behaviors that materially affect the employee experience and convert one of them into a specific 30-day change.

Common Mistakes

- Rating yourself based on what you believe rather than what you consistently do.
- Giving every item a high score without evidence.
- Trying to improve all six principles at once.
- Completing the assessment once and never revisiting it.

What to Do Next

Next step: Put the 30-day behavior into practice and identify how you will know whether employees are experiencing a difference.

4. Employee Motivation Diagnostic

Purpose

Use this when motivation, engagement, initiative, or commitment appears to be declining. The purpose is to investigate the work environment before labeling the employee as unmotivated.

How to Complete It

- Rate the nine motivation conditions: autonomy, mastery/competence, purpose, fairness, recognition, connection, growth, clarity, and sustainable workload.
- For each rating, record evidence or an example. Distinguish the employee's actual experience from what leadership assumes the employee should be experiencing.
- Review the early warning signs and identify approximately when the change began.
- Ask what changed around that time: workload, supervision, team relationships, role expectations, recognition, development opportunities, or something outside leadership's control.
- Identify which motivation condition appears most affected and what part of the situation is within leadership's influence.
- Create a 30-day action with specific leadership behavior, employee conversation, barrier removal, development/autonomy opportunity, recognition, and a review date.

What Good Use Looks Like

Good use looks like: You replace a vague judgment such as 'they are not motivated anymore' with a testable explanation and a specific leadership response.

Common Mistakes

- Assuming low motivation is a personality problem.
- Trying to fix everything at once.
- Promising changes leadership cannot reasonably make.
- Taking action without setting a date to see whether anything improved.

What to Do Next

Next step: Implement the 30-day action and review whether the targeted motivation condition actually changed.

5. One-on-One Coaching Guide

Purpose

Use this for regular development-focused one-on-ones. The leader should ask more questions than they answer and leave with clear commitments and follow-up.

How to Complete It

- Start with the employee's view of what is going well, what is getting in the way, and what is consuming unnecessary time or energy.
- Coach the employee's thinking before supplying your answer. Ask what they have tried, what options they see, and what they would recommend.
- Move from the immediate problem to capability development. Ask what the employee wants to learn or improve.
- Identify a decision, project, or responsibility the employee could own rather than simply assigning more tasks.
- Clarify what support, feedback, or access the leader will provide.
- Close with explicit employee action, leader action, timing, and a way to determine whether progress occurred.

What Good Use Looks Like

Good use looks like: The employee does more of the thinking, leaves with meaningful ownership, and both parties know what happens before the next check-in.

Common Mistakes

- Turning the meeting into a status report.
- Answering every question for the employee.
- Delegating tasks without delegating judgment or ownership.
- Repeatedly canceling one-on-ones and unintentionally signaling that development is optional.

What to Do Next

Next step: Protect the next check-in and follow up on both the employee's commitment and your own.

6. Team Effectiveness Scorecard & Norms Builder

Purpose

Use this with a leadership team or workgroup to evaluate the conditions supporting team performance and then translate stated values into observable norms.

How to Complete It

- Rate the team on trust, psychological safety, healthy conflict, commitment, accountability, communication, and shared purpose.
- Require evidence for ratings. Focus on what team members actually do when deadlines slip, mistakes occur, disagreement emerges, or bad news needs to be raised.
- Identify the foundation currently limiting team performance the most.
- Use the Norms Builder to define the behaviors that should characterize the team, then compare them with what the team consistently demonstrates.
- Identify the largest gap between what the team says matters and what it tolerates.
- Convert broad values into observable norms for meetings, communication, disagreement, deadlines, mistakes, accountability, and recognition.
- Before major decisions, use the groupthink check to invite alternative views and examine risks.

What Good Use Looks Like

Good use looks like: The team identifies a small number of behavioral norms that are specific enough to observe, reinforce, and correct.

Common Mistakes

- Writing values such as 'respect' or 'communication' without defining what they look like.
- Using the scorecard to label individuals rather than diagnose team patterns.
- Creating norms leaders do not model themselves.
- Treating disagreement as a failure of teamwork.

What to Do Next

Next step: Select the few norms that matter most, make them visible, and review them after real meetings and decisions rather than only during team-building sessions.

7. Accountability Conversation Planner

Purpose

Use this before a difficult performance conversation. The aim is high expectations plus high support: correct the behavior, preserve dignity, and make success next time unmistakable.

How to Complete It

- Establish the facts by describing the specific observable behavior or result that needs to change. Remove labels such as lazy, negative, unreliable, or unprofessional.
- Identify the applicable standard, expectation, policy, commitment, or deadline and the impact of the gap.
- Complete the fairness and consistency check before the conversation. Confirm that expectations were communicated, resources were reasonably available, and similar situations have been handled consistently.
- Identify context you still need to understand before concluding why the problem occurred.
- Plan the conversation sequence: describe, listen, re-state the standard, look forward, support, commit, and follow up.
- Document the expected result, employee commitment, leader support, measurement, follow-up date, and what happens if improvement does not occur.

What Good Use Looks Like

Good use looks like: The employee understands the issue and standard, has an opportunity to provide relevant context, and leaves knowing exactly what success looks like and when it will be reviewed.

Common Mistakes

- Attacking character instead of addressing behavior.
- Enforcing a standard that was never made clear.
- Ignoring legitimate differences in circumstances.
- Ending with vague expectations or no follow-up date.

What to Do Next

Next step: Follow up exactly when promised. Accountability weakens when leaders have the conversation but do not return to the commitment.

8. Change Communication Planner

Purpose

Use this before and during significant organizational change. The purpose is to reduce avoidable uncertainty without pretending every answer is known.

How to Complete It

- Explain the why before the what. Define the problem being solved and why change is necessary now.
- State clearly what is changing and what is not changing. Both matter because employees often fill information gaps themselves.
- Use the Uncertainty Map to anticipate concerns about job or role security, ability to succeed, reporting relationships, workload, timing, and genuine unknowns.
- For each concern, determine what leadership can accurately say now. Do not manufacture certainty.
- Build a communication cadence covering the initial announcement, manager cascade, employee questions, progress updates, and decision or milestone updates.
- Use the consistency check so leaders are working from the same core facts and rationale while understanding what they may decide locally.
- Anticipate the next question employees are likely to ask after the first message.

What Good Use Looks Like

Good use looks like: Employees may not like every aspect of the change, but they understand why it is happening, what is known, what remains unknown, what happens next, and where questions can be raised.

Common Mistakes

- Waiting until every answer is known before communicating.
- Allowing different leaders to provide conflicting explanations.
- Communicating once and assuming the message is finished.
- Treating 'we do not know yet' as something that must be hidden.

What to Do Next

Next step: Deliver the first communication, collect the questions it creates, and use those questions to shape the next update.

9. Stay Interview & Retention Guide

Purpose

Use this before an employee has decided to leave. It is not a performance review. The objective is to understand the employee's experience while leadership still has room to strengthen it.

How to Complete It

- Create enough psychological safety for honest answers. The employee should not feel that criticism of the workplace or leader will be punished.
- Ask the core questions and listen for patterns involving satisfaction, frustration, barriers, development, recognition, leadership, and thoughts about leaving.
- Do not immediately defend the organization or explain why a concern exists. First make sure you understand the employee's experience.
- Complete the Retention Risk Scan based on evidence and the employee's comments rather than intuition.
- Separate what leadership can reasonably fix now, what requires a longer-term solution, and what cannot honestly be promised or changed.
- Identify development opportunities, recognition or feedback, leader commitments, employee commitments, and a follow-up date.

What Good Use Looks Like

Good use looks like: You learn something you can act on before resignation becomes the first time leadership hears the problem.

Common Mistakes

- Turning the stay interview into a performance evaluation.
- Becoming defensive when the employee raises a concern.
- Promising pay, promotions, flexibility, or other changes you cannot deliver.
- Asking for feedback and then never following up.

What to Do Next

Next step: Act on the commitments you can make, communicate clearly about what you cannot change, and return to the conversation on the agreed date.

10. Meeting-to-Execution Tracker

Purpose

Use this at the end of meetings, planning sessions, and leadership discussions. Conversation creates value only when it produces clarity, ownership, action, and follow-through.

How to Complete It

- Define the specific decision, problem, or outcome that must be clearer when the meeting ends. Also identify what does not need to be discussed.
- Record decisions separately from action items. A decision should include the reason or key constraint and who needs to know.
- For every action, identify what will be done, one clear owner, a due date, how progress will be measured, and any status or barrier.
- Use the execution discipline check before ending the meeting. Confirm ownership, deadlines, realistic capacity, known barriers, and a follow-up mechanism.
- Identify the single most important action coming out of the meeting.
- Explicitly decide what will be stopped, deferred, or deprioritized to protect capacity for the new work.
- Set the next review date and use the 30-day execution review to examine completion, unclear ownership, added priorities, and work that could have been eliminated.

What Good Use Looks Like

Good use looks like: Participants leave knowing what was decided, what they own, when it is due, what success means, and when progress will be reviewed.

Common Mistakes

- Ending meetings with general agreement but no named owner.
- Assigning an action to a group rather than one accountable person.
- Adding priorities without removing or deferring anything.
- Measuring meeting productivity by activity rather than execution.

What to Do Next

Next step: Use the tracker at the next review point. Close completed actions, surface barriers, and challenge work that has been added without corresponding capacity.