Open Leadership: Transform the Way You Lead

Featuring Charlene Li,
Author of *Open Leadership: How Technology Can Transform the Way You Lead*
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Introduction and Materials Required

Introduction

Welcome to the Linkage broadcast, *Open Leadership: Transform the Way You Lead*. This broadcast from Linkage’s *Thought Leader Series* features Charlene Li, author of *Groundswell*, and thought leader on leadership, strategy, social technologies, interactive media and marketing. Charlene shows how leaders can use the power of the social technology and use social media to be ‘open’ while maintaining control.

Talk with your customers. Listen to your employees. These are longtime, well tested truisms of business. But ask organizations to engage with people on Facebook or Twitter and a look of sheer terror crosses their faces. The long held concept of command-and-control leadership is being tested as organizations are experiencing the largest technological and sociological shift of our generation. Ms. Li advises leaders how to feel in command in a world where you are no longer in control.

For example, how open, how transparent, how authentic, and how real do you need to be? More importantly, how do you leverage and measure the impact of using social technologies in your organization? Ms. Li lays out a new approach that today’s leaders must adopt for competitive advantage.

Charlene Li is an influential thought leader and guide on emerging technologies, with a specific focus on social technologies, interactive media, and marketing. In her newest book *Open Leadership: How Social Technology Can Transform the Way You Lead* Charlene Li describes three trends in the new culture of sharing:

1. More people online
2. The widespread use of social sites
3. The rise of sharing.

Social media has not only empowered customers but also given employees new ways to collaborate with each other – a good thing – and new opportunities to publicly grumble about their jobs – a not-so-good thing.

Ms. Li defines open leadership as ‘having the confidence and humility to give up the need to be in control while inspiring commitment from people to accomplish goals’.

In order to foster new relationships in open leadership, and understand and govern these new relationships, there are new rules required such as:

- Respect that your customers and employees have power
- Share constantly to build trust
- Nurture curiosity and humility
- Hold openness accountable
- Forgive failure
There has to be a balance in organizations between being open and closed. In order to understand the meaning of being more open Ms. Li will address the ten elements of being open. She takes a look at what it means to be open and examines what you are really letting go of as you become more open.

Figure 1: Defining Openness: The Ten Open Elements

Once you know the different ways you and your organization can be open it is important to determine how open you need to be. You need to create a successful strategic plan. Ms. Li has found there are four underlying objectives integrated into almost every successful strategic plan.

Figure 2: Four Open-Driven Objectives Support the Open Strategy

It is crucial to tie your open strategy to your overall corporate strategic goals. Ms. Li will describe 5 steps to do just this, and also how to prioritize where and how to be open:

1. Identify a strategic goal to address
2. Put in place learning systems to support that goal
3. Determine which open-driven objective can help the most
4. Gauge the need to be open
5. Gauge you ability to be open
During this program you will learn:

- Why being open and in control is possible
- The characteristics, skills, and behaviors of today’s “open” leaders
- Best practices in creating a coherent and effective social media strategy
- How to implement an “open” strategy

Following the presentation, use the 30-minute question-and-answer period to learn whether or not your organization or team is open and create an action plan that fits your needs. Open Leadership will help your organization become more effective, decisive, and ultimately more profitable in this new era of openness in the marketplace.

Charlene Li is founder of Altimeter Group and the author of the New York Times bestseller, Open Leadership. She is also the coauthor of the critically acclaimed, bestselling book Groundswell: Winning In a World Transformed by Social Technologies which was named one of the best business books in 2008. She is one of the foremost experts on social media and technologies and a consultant and independent thought leader on leadership, strategy, social technologies, interactive media and marketing. Formerly Li was vice president and principal analyst at Forrester Research and a consultant with Monitor Group. She was named one of the 100 most creative people in business by Fast Company in 2010 and one of the most influential women in technology in 2009.

Ms. Li is frequently quoted by leading media channels such as The Wall Street Journal, New York Times, USA Today, Reuters, and The Associated Press. She has appeared on 60 Minutes, The McNeil NewsHour, ABC News, CNN, and CNBC. She is a much-sought after public speaker and has keynoted top conferences such as the World Business Forum, American Society of Association Executives, SXSW, and Web 2.0.

Ms. Li is a graduate of Harvard Business School and received a magna cum laude degree from Harvard College.

This facilitator guide was developed to help facilitators make the most of the program with their audience or group. In this guide, you’ll find:

- Background material to help add richness to your discussions.
- Activities for a variety of group sizes and of varying leadership levels. Depending on your unique audience (and your own facilitation capabilities), you may wish to modify these activities to better meet the needs of your group(s).
- Facilitation tips and techniques that you may find useful as you prepare to facilitate the pre- and post-broadcast discussions.

Use this guide and its activities as they fit your needs. Before preparing for the broadcast, you will want to quickly preview this entire guide to determine how best to leverage the activities for your audience. Because this guide was designed for a variety of facilitation scenarios, it will likely include activities that may not exactly fit yours.
Conventions

The following conventions are used throughout this guide:

- Materials that are required will be listed in the left column. Directions are provided in the middle column. Space for your notes is provided on the right side of the page.

- SAY: The text following this direction is most effective if read verbatim. Note that most of the directions encourage you to use your own style and/or words.

- ASK: The text following this direction will usually have a question to ask, as well as suggested answers. The answers are provided to help you lead the discussion and/or to ensure that the critical points are drawn out from the participants.

Materials: Pre-Broadcast Activities

The following materials are required for the pre-broadcast presentation; you may wish to prepare the flip charts ahead of time.

- Agenda
- Flip chart markers
- Tape to post the flip chart pages
- Flip chart stand and paper
- Participant Guide (one set per participant)
- Name cards (optional depending on your setting)
- Pencils

Instructions for receiving the broadcast or Extended View will be provided separately.

Materials: Broadcast Presentation

Other than the materials listed previously for the pre-broadcast presentation, there are no additional materials required for this section if you are viewing the live broadcast. If you are viewing by Extended View via the Web, you will need the username and password as well as a web connection to access the broadcast.

Materials: Post-Broadcast Activities (Optional)

In addition to the materials listed previously, the following materials are required for the post-broadcast activities:

- Extra flip chart paper, markers, and tape to post the flip charts
Pre-Broadcast Activities
45-70 minutes

<table>
<thead>
<tr>
<th>VISUALS/MATERIALS</th>
<th>TOPIC/ACTIVITY</th>
<th>TIME/NOTES</th>
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<tbody>
<tr>
<td></td>
<td>Welcome and Introductions</td>
<td>15-30 minutes</td>
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1. **WELCOME** participants to the special broadcast in the Linkage *Thought Leader Series* featuring Charlene Li.

2. **INTRODUCE** yourself. **WRITE** your name and title on a flip chart.

3. **EXPLAIN** the focus of the pre-broadcast program. **SAY:**
   - Participating in today’s broadcast gives you the opportunity to hear from Ms. Charlene Li, founder of the Altimeter Group and author of the bestselling book *Groundswell: Winning In a World Transformed by Social Technologies*
   - Ms. Li will share insights from his book, *Open Leadership –How Social Technology Can Transform the Way You Lead*. Ms. Li explain how Open Leadership can transform the way you lead.
   - Mr. Li will explain why being open and in control is possible. What the characteristics, skills, and behaviors of today’s “open” leaders are. She’ll also talk about some of the best practices in creating a coherent and effective media strategy and how to implement the “open” strategy.

4. **REVIEW** the Program Agenda (as a slide, flip chart, or handout).
   - Pre-Broadcast Activities (optional)
   - Presentation with Charlene Li (90 minutes)
   - Post-Broadcast Activities (optional)

5. **EXPLAIN** the workshop ground rules:
   - Be committed to learning.
   - Be a critical thinker.
   - Listen actively and without passing judgment.
   - Respect and uphold confidentiality.

Note: The timing can be expanded or limited depending on how much discussion you wish to allow.
**VISUALS/MATERIALS** | **TOPIC/ACTIVITY** | **TIME/NOTES**
--- | --- | ---
| | 6. **EXPLAIN** general “housekeeping” (breaks, facility information, etc.). | |
| | 7. **REFER** participants to the flip chart with the statements: “Be Open, Be transparent, Be Authentic”. These are current leadership mantras – but companies often push back. Traditionally, business is premised on the concept of control and yet the new world order demands openness. | |
| | **DIRECT** participants to introduce themselves to a person they do not know and to ask the other participant the following questions: | |
| | • What is your name? | |
| | • What is your job/title? | |
| | • How open is your organization? Do you have an open leadership style? | |
| | 8. **ASK** participants to share their thoughts while keeping the tone of the conversation focused on these points: | |
| | • There has to be a balance in the organization between being open and closed. | |
| | • It is crucial to tie your open strategy to your overall corporate strategic goals. | |
| | 9. **TRANSITION** to **Optional Pre-Broadcast Reading and Activity or to Question Generation.** | |

Note: These introductory activities are not in the participant guide.
<table>
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<tr>
<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td>Optional: Pre-Broadcast Reading</td>
<td>The following reading will help prepare participants more fully for the broadcast. The reading provides an overview of Charlene Li’s approach to open leadership. <strong>READ from the participant guide:</strong> “Ms. Li defines open leadership as ‘having the confidence and humility to give up the need to be in control while inspiring commitment from people to accomplish goals’.”</td>
<td>10-20 minutes</td>
</tr>
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</table>

1. In order to foster new relationships in open leadership, and understand and govern these new relationships, there are new rules required”

2. **ASK** participants to read (or review, if you provided this material as precourse work) the Introduction and Basic Premise on pages 9 and 10 in their participant guides.

3. After a few minutes, ask participants to share their thoughts on the open leadership & social technology. Lead the discussion making the following points:
   - It is important to understand and govern new relationships in open leadership and follow a few basic rules.
   - It is crucial to tie your open strategy to your overall corporate goals.

4. **SUMMARIZE** key points from the discussion around how social technology can transform the way you lead. With Charlene Li’s help, we’ll be able to understand open leadership and how to implement it in your organization.

5. **TRANSITION** to Optional Pre-Broadcast Activity or to Question Generation.

Note: Depending on the time you have for pre-broadcast discussion, you may wish to provide the participant guide ahead of time and ask participants to complete this reading before coming to the broadcast.
1. The following survey and activity will help prepare participants more fully for the broadcast:
   - The pre-broadcast activity includes an openness audit from *Open Leadership* to help you understand how open you are today.
   - It is useful to be able to recognize how open you already are in order to see where you can improve.

2. **ASK** participants to take (or review, if you provided this material as precourse work) the survey and complete the activity on pages 11-13 in their participant guides.

3. Give participants sufficient time to complete or review the activity.

4. After about 15 minutes, call attention back to yourself and ask participants to share their thoughts on the activity. Lead the discussion while making the following points:
   - How open is your organization?
   - How open does your organization need to be?

5. **ASK** participants to consider their priority element as they participate in the broadcast and post-broadcast activities.

6. **TRANSITION** to *Question Generation.*
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<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td></td>
<td>Question Generation</td>
<td>5 minutes</td>
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**NOTE:** This section is only applicable if you are viewing the broadcast live.

1. **EXPLAIN** that in this broadcast Charlene Li will spend a portion of the broadcast responding to questions. As such, it is critical that participants submit questions. Encourage participants to make the most of the opportunity to interact with the presenter.

2. **EXPLAIN** that it is now possible to submit questions through Twitter using the hash tag #LinkageInc.

3. **ASK** participants to identify (in pairs or small groups) at least three questions they have for Ms. Li.

4. **RECORD** questions on a flip chart. Identify any redundancies and generate a list of questions for submission.

**NOTE:** As facilitator, you should collect these questions and submit them to Linkage on behalf of your group using one of the following methods:

- Webcast viewing window
- Twitter: hash tag #LinkageInc
- Email: leadership2011@linkageinc.com

Encourage participants to submit any additional questions they would like either before or during the broadcast. They can write their questions on the second to last page of their participant guide and provide the page to you during the broadcast.

5. **TRANSITION** to **Introduction to Broadcast.**
# Broadcast

**65 minutes**

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<tr>
<th>VISUALS/MATERIALS</th>
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<td>Introduction to Broadcast</td>
<td>5 minutes</td>
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1. **INTRODUCE** the title of the broadcast, Open Leadership: Transform the Way You Lead, featuring Charlene Li, author of the bestseller Groundswell and founder of the Altimeter Group

2. **EXPLAIN** the focus and highlights of the program:
   - Ms. Li will use her knowledge and experience to show us:
     - Why being open and in control is possible
     - The characteristics, skills and behaviors of today’s “open” leadership
     - Best practices in creating a coherent and effective social media strategy
     - How to implement an ‘open’ strategy

3. **EXPLAIN** methods for being an active participant:
   - Listen actively to Ms. Li’s presentation. As you listen to his key points, apply his insights to your personal experiences leading your company’s team.
   - Should you wish to take notes, there is space provided next to the slides on pages 17-31.
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<tr>
<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td>Broadcast Presentation</td>
<td>90 minutes</td>
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<tr>
<td>Last Page</td>
<td>1. <strong>MONITOR</strong> the room throughout the broadcast. Make note of themes that you want to emphasize or reinforce after the broadcast.</td>
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<td></td>
<td>2. When the broadcast has ended, remind participants to complete and submit the Broadcast Evaluation Form found on the last page of their guide.</td>
<td></td>
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<td></td>
<td>3. <strong>TRANSITION</strong> to <em>Post-Broadcast Activities</em>.</td>
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# Post-Broadcast Activities

*Optional*  
_Suggested: 2 hour 40 min.-3 hours 20 min._

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<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td><strong>Introduction to Post-Broadcast Program</strong></td>
<td>5 minutes</td>
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1. **EXPLAIN** that the Post-Broadcast Program will allow participants to:
   - Review the highlights of the broadcast.
   - Discuss the key learning and applications with colleagues.
   - Use the learning from the broadcast for personal action planning.

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<thead>
<tr>
<th>Activity 1: Self-Reflection and Discussion</th>
<th>15 minutes</th>
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1. Because this activity is general in nature, it is relevant for most audiences.

2. **DIRECT** participants to turn to their guides.

3. **ASK** participants to share their key learning and takeaways from the broadcast and Q&A portion by asking the following questions and discussing as appropriate:

   **Q#1:** What in Charlene Li’s presentation struck a special chord with you? Why?

   **Q#2:** Reflect on what you may not know about your team, department, or organization and what you have taken from Ms. Li’s presentation. Do you feel your organization has an innovation driven culture? How do you think you can help to create a better organization by focusing on this?

   **Q#3:** How do YOU create new ideas? What can you take away from Ms. Li’s presentation?

**Teaching Points:**
- How social technology can transform your organization and the way you lead.

4. Go to the next chosen activity or the Final Activity: Action Planning.
This activity is general in nature and relevant for most audiences.

1. **READ** the information on page 34 in the participant guide.

   Ms. Li explains the importance of tying your open strategy to your organizational strategy.

   **EXPLAIN** that for this activity, participants should reflect on their own organization. Think about each factor and reflect on how your organization deals with this and how you can improve this.

2. **DISCUSS** the ideas of the participants and see if they can share and exchange ideas.

   **ASK** each participant to identify the one thing that they will do first. Applaud their initiative and commitment.

3. Go to the next chosen activity or the Final Activity: Action Planning.
## Activity 3: Calculating the Benefits of Openness

Because this activity is general in nature, it is relevant for most audiences.

1. For this activity we’ll take a closer look at the benefits of openness and how to measure your openness.

2. Allow the participants to read through and answers the 5 questions on pages 36 and 37.

3. **DISCUSS** or have participants read answers to the following questions:
   - What are your objectives?
   - What are the most important key performance indicators (KPIs)?
   - What open activities support the KPIs?
   - Establish a baseline for your objectives and KPIs.
   - Optimize and adjust your KPIs and priorities.

**Teaching Points:**
- How to measure your openness

4. Go to the next chosen activity or the **Final Activity:** Action Planning.

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<tbody>
<tr>
<td></td>
<td><strong>Activity 3: Calculating the Benefits of Openness</strong></td>
<td><strong>30-40 minutes</strong></td>
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<tr>
<td><img src="image.png" alt="Image" /></td>
<td>Page 36-37</td>
<td><img src="image.png" alt="Image" /> You may want to familiarize yourself with these concepts before facilitating this discussion.</td>
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<tr>
<td>Activity 4: Openness Leadership Assessment</td>
<td>40 - 60 minutes</td>
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1. **READ** from the participant guide: Activity 4 Part A.

   It is important to understand your mind-set as it pertains to how you approach being open, and also to do an assessment of key leaders within your organization as well. The reason: if having and implementing an open strategy is of importance to you, you will need effective open leaders to lead the way.

2. **ALLOW** 10 – 15 minutes for the participants to fill out the questionnaire.

3. **REFLECT** on the activity for 10-15 minutes.

4. **READ** from the participant guide: Activity 4 Part B

   The following activity has contrasting statements about having individualistic and collaborative mind-sets.

5. **ALLOW** 10-15 minutes for the participants to fill out the questionnaire

6. **REFLECT** on the activity for 10-15 minutes.

   **Teaching Points:**
   - Allow the participants to get insight in their own mindsets (pessimistic vs. optimistic and individualistic vs. collaborative).

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| Activity 5: Open Leadership Skills Assessment Test | 30 minutes |

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<tbody>
<tr>
<td></td>
<td>1. <strong>READ</strong> from page 39 in the participant guide:</td>
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</table>

   This assessment looks at your open leadership skills. Allow the participants to fill out the assessment for 15-20 minutes.

|   | 2. **DISCUSS** the findings. |

<p>|   | 3. Optional: <strong>ASK</strong> for volunteers to share examples. |</p>
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<td><strong>Activity 6: Final Activity</strong></td>
<td><strong>30 minutes</strong></td>
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<tr>
<td><img src="image" alt="Page 42" /></td>
<td><strong>1. READ</strong> from page 42 in the participant guide:</td>
<td></td>
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<tr>
<td></td>
<td>Now is the time to get moving. Everything in today’s broadcast supports the need to take action and start implementing the lessons shared. Picture yourself six months from now. You’re reflecting with a sense of pride and satisfaction on how you are being more open using social technology by using Ms. Li concepts. What have you done to create a more open environment without losing control?</td>
<td></td>
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<td></td>
<td><strong>2. READ:</strong> Back to the present. With the above goal set for six months from now, what intermediary steps do you need to take to reach that goal?</td>
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<td></td>
<td><strong>DIRECT</strong> participants to individually complete the page in their participant guide.</td>
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<tr>
<td></td>
<td><strong>3. DISCUSS.</strong></td>
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<td></td>
<td><strong>4. Optional:</strong> <strong>ASK</strong> for volunteers to share examples.</td>
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<tr>
<td><img src="image" alt="Page 43-47" /></td>
<td><strong>Conclusion</strong></td>
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<td></td>
<td><strong>5 minutes</strong></td>
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<td></td>
<td><strong>1.</strong> Thank participants for investing this time to learn how to be open and in control at the same time. What characteristics</td>
<td></td>
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<td></td>
<td><strong>2.</strong> Encourage participants to take the positive actions necessary to create an open environment. Tell them to use Charlene Li’s thoughts and theories to help them create that environment!</td>
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<td></td>
<td><strong>3.</strong> Pages 43-47 contain some further development activities for the participants.</td>
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