

KBI DIGITAL

THE MANAGER-LEADER TOOLKIT

Printable Tools for Managing the Work
and Leading the People

EXECUTION	DIRECTION
TRUST	CAPABILITY

A companion resource for Manage the Work, Lead the People

Use these pages to diagnose real situations, prepare conversations, delegate with clarity, and turn insight into action.

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How to Use This Toolkit

The central skill of the manager-leader is diagnosis. These worksheets help you slow down long enough to identify the real problem before choosing a response.

A SIMPLE WORKFLOW

1	Name the situation	Describe what is happening without assigning motive.
2	Make a quick first pass	Is this primarily an execution issue or does it require leadership attention?
3	Use all four lenses	Examine execution, direction, trust, and capability in order.
4	Choose the response	Match the action to the diagnosis instead of reacting to the loudest symptom.
5	Follow through	Set ownership, timing, checkpoints, and a way to measure progress.

MANAGEMENT AND LEADERSHIP

Management is the execution lens: it creates structure, priorities, ownership, resources, controls, and accountability. Leadership covers direction, trust, and capability: it helps people understand where they are going, speak honestly, and build the judgment and confidence to succeed.

KBI TIP

Do not force every situation into a single lens. Start with execution, then continue through all four. The first visible problem is not always the root cause.

This resource is for professional development and general educational use. Follow your organization's policies and involve Human Resources, Legal, Payroll, or another appropriate partner when employment law, compensation, leave, accommodations, safety, harassment, discrimination, or sensitive personal circumstances may be involved.

Four-Lens Quick Reference

Use the lenses in this order. Each one reveals a different kind of problem and calls for a different response.

LENS	QUESTION TO ASK	WARNING SIGNS	TYPICAL RESPONSE
EXECUTION	Is the work clear, owned, resourced, and controlled?	Missed commitments; unclear ownership; conflicting priorities; weak handoffs; repeated rework.	Structure, priorities, ownership, resources, checkpoints, and accountability.
DIRECTION	Do people understand why this matters and where they are going?	Activity without alignment; conflicting decisions; uncertainty about purpose; change fatigue.	Purpose, context, choices, priorities, and a credible path forward.
TRUST	Do people feel safe speaking honestly and believe leadership will respond fairly?	Silence; guarded updates; surprises; blame; low participation; concerns raised too late.	Listening, consistency, transparency, ownership, and follow-through.
CAPABILITY	Do people have the skill, judgment, confidence, and support to succeed?	Dependence on one expert; avoidable errors; hesitation; weak decisions; tasks repeatedly returned to the manager.	Coaching, practice, feedback, authority, development, and time to learn.

Remember: A missed deadline may look like an execution problem, but the deeper cause could be unclear direction, low trust, or insufficient capability. Diagnose before you prescribe.

Management-or-Leadership Quick Check

Use this as a first pass. Then complete the full four-lens diagnosis when the issue is important, recurring, or unclear.

THE SITUATION

What happened?

MANAGEMENT / EXECUTION	LEADERSHIP / PEOPLE
☐ Expectations are unclear ☐ Ownership is unclear ☐ Priorities conflict ☐ Resources are missing ☐ Checkpoints or controls are weak ☐ Accountability is inconsistent	☐ People do not understand why ☐ People are withholding concerns ☐ Confidence or judgment is weak ☐ Change has not been explained ☐ Trust has been damaged ☐ Coaching or development is needed

My first-pass diagnosis:

What evidence supports it?

What might I be missing?

Do I need the full four-lens review? Why or why not?

Four-Lens Diagnosis Worksheet

Page 1 of 2 - Define the situation and examine each lens before choosing an action.

Situation or decision:

Observable facts - what do I know?

Assumptions - what am I interpreting or guessing?

EXECUTION

Is the work clear, owned, resourced, and controlled?

Evidence /
warning signs:

DIRECTION

Do people understand why this matters and where they are going?

Evidence /
warning signs:

TRUST

Do people feel safe speaking honestly and believe leadership will respond fairly?

Evidence /
warning signs:

CAPABILITY

Do people have the skill, judgment, confidence, and support to succeed?

Evidence /
warning signs:

Four-Lens Action Plan

Page 2 of 2 - Turn the diagnosis into a focused response with clear ownership and follow-through.

Primary lens and why:

Secondary lens or interaction to watch:

Response - what will I do or say?

OWNER	ACTION	DUE	CHECKPOINT

How will I know the response is working?

What could create unintended consequences?

Review date and next decision:

Delegation Planner

Delegate outcomes, authority, and checkpoints - not just tasks. Use this before assigning the work.

Work or outcome being delegated:

Why this person? What development opportunity does it create?

Definition of done - expected result, quality, timing, and nonnegotiables:

LEVEL OF AUTHORITY

- ☐ Research and report back; I will decide.
- ☐ Recommend an option; I will approve the decision.
- ☐ Decide, then tell me before acting.
- ☐ Decide and act within agreed boundaries.
- ☐ Own the outcome and keep me informed at checkpoints.

Resources, access, context, or support provided:

Checkpoints - when and what will we review?

What will I do if the person approaches the work differently than I would?

What must I avoid taking back?

Feedback Conversation Planner

Use a repeatable structure: behavior, impact, expectation, and perspective.

1. BEHAVIOR

What specific, observable behavior or result needs to be discussed? Avoid labels and assumptions.

2. IMPACT

What effect did it have on the work, customer, team, deadline, risk, or relationship?

3. EXPECTATION

What needs to happen going forward? Be specific about the standard and timing.

4. PERSPECTIVE

What question will I ask to understand the employee's view?

Agreement, support, and follow-up date:

SAMPLE OPENING

"I want to discuss [specific behavior or result]. The impact was [specific impact]. Going forward, I need [clear expectation]. I'd like to understand your perspective. What was happening from your point of view?"

Difficult Conversation Preparation

Prepare the message, regulate your response, and leave room to learn something you do not yet know.

What outcome am I trying to achieve?

What facts and examples can I describe?

What assumptions or emotions could distort my approach?

What is the clearest, fairest opening statement?

What questions will I ask?

How will I respond if the person disagrees, becomes upset, or shares new information?

What agreement and follow-up are needed?

HR / LEGAL CAUTION

Do not investigate sensitive personal circumstances on your own or press for medical, family, disability, leave, harassment, discrimination, or other protected information. Follow company policy and involve the appropriate partner early.

Conflict Mediation Worksheet

Your role is not to decide who is the better person. Help the employees define the work problem, hear one another, and agree on future behavior.

Workplace issue to resolve:

PERSON A - FACTS AND IMPACT

PERSON B - FACTS AND IMPACT

Shared facts and points of agreement:

Effect on the work, team, customers, or relationships:

Behavior each person needs from the other:

Specific agreements and boundaries:

Follow-up date and signs of progress:

Escalate promptly when the concern involves safety, threats, harassment, discrimination, retaliation, policy violations, or another matter requiring formal review.

First 90 Days Planner

For a new manager, a new team, or a major change in responsibility.

FIRST 30 DAYS	DAYS 31-60	DAYS 61-90
LISTEN AND LEARN ☐ Meet team members ☐ Learn the work ☐ Map stakeholders ☐ Observe team norms ☐ Identify immediate risks ☐ Avoid changing everything	CLARIFY AND STABILIZE ☐ Confirm priorities ☐ Clarify ownership ☐ Establish meeting rhythm ☐ Address urgent gaps ☐ Begin delegating ☐ Explain decisions	IMPROVE AND DEVELOP ☐ Improve one key process ☐ Coach capability gaps ☐ Build succession depth ☐ Review opportunity access ☐ Set next-quarter goals ☐ Ask for feedback

What must I understand before making major changes?

What work am I still doing that I should delegate?

How will I reset relationships if I now manage former peers?

What will success look like at day 90?

First 90 Days Action Plan

Translate your priorities into actions, relationships, and learning goals.

PEOPLE TO MEET

Action / person / question	Target date	Notes / outcome

WORK AND SYSTEMS TO LEARN

Action / person / question	Target date	Notes / outcome

RISKS TO UNDERSTAND

Action / person / question	Target date	Notes / outcome

EARLY ACTIONS

Action / person / question	Target date	Notes / outcome

WORK TO DELEGATE

Action / person / question	Target date	Notes / outcome

TRUST TO BUILD

Action / person / question	Target date	Notes / outcome

One-on-One Meeting Guide

A one-on-one should surface progress, obstacles, support needs, and development - not simply repeat a status report.

Employee / date:

PROGRESS

What is going well? What has moved forward since we last met?

OBSTACLES

What is slowing the work or creating unnecessary friction?

PRIORITIES

What matters most before our next meeting? What can wait?

SUPPORT

What decision, context, resource, or connection is needed from me?

DEVELOPMENT

What skill, judgment, authority, or exposure would help this person grow?

FEEDBACK

What feedback do I need to give? What feedback should I ask for?

Commitments: who will do what by when?

Team Health Check

Use monthly or quarterly. Rate each item from 1 (weak) to 5 (strong), then choose one improvement priority.

LENS	STATEMENT	1	2	3	4	5
Execution	Priorities are clear.	☐	☐	☐	☐	☐
Execution	Ownership and decision rights are clear.	☐	☐	☐	☐	☐
Execution	Commitments are tracked and followed through.	☐	☐	☐	☐	☐
Direction	People understand why the work matters.	☐	☐	☐	☐	☐
Direction	The team understands where it is going.	☐	☐	☐	☐	☐
Direction	Tradeoffs and changes are explained.	☐	☐	☐	☐	☐
Trust	People raise risks and bad news early.	☐	☐	☐	☐	☐
Trust	Leaders respond consistently and fairly.	☐	☐	☐	☐	☐
Trust	Mistakes lead to learning, not hiding.	☐	☐	☐	☐	☐
Capability	People have the skills and support to succeed.	☐	☐	☐	☐	☐
Capability	Work is not dependent on one hero.	☐	☐	☐	☐	☐
Capability	Development and visibility are distributed fairly.	☐	☐	☐	☐	☐

The team’s strongest lens:

The lens needing the most attention:

One improvement we will make next:

Manager Sustainability Check

Leadership quality declines when the manager has no capacity left to think, listen, or regulate a response.

CHECK THE WARNING SIGNS

- ☐ I am doing work that should belong to someone else.
- ☐ My calendar leaves no time to think or prepare.
- ☐ I react more sharply when pressure rises.
- ☐ I delay difficult conversations because I am depleted.
- ☐ The team depends on me for too many decisions.
- ☐ I regularly work beyond sustainable limits.
- ☐ I am losing perspective, patience, or curiosity.

What only I can do:

What I can delegate, stop, simplify, or postpone:

My pressure triggers and early warning signs:

How I will pause and regulate before responding:

Support or escalation I need:

One boundary I will protect this month:

30-Day Manager-Leader Challenge: Days 1-15

Complete one practical action each day. Capture what you noticed and what you will do next.

DAY	ACTION	DONE	WHAT I NOTICED / NEXT STEP
1	Clarify one priority.	☐	
2	Define what 'done' means.	☐	
3	Confirm ownership.	☐	
4	Remove one obstacle.	☐	
5	Set a useful checkpoint.	☐	
6	Explain why a task matters.	☐	
7	Connect work to purpose.	☐	
8	Restate the direction.	☐	
9	Name a tradeoff clearly.	☐	
10	Test for alignment.	☐	
11	Listen without fixing.	☐	
12	Invite a hard truth.	☐	
13	Close a follow-through gap.	☐	
14	Own one mistake.	☐	
15	Make one response more consistent.	☐	

30-Day Manager-Leader Challenge: Days 16-30

Complete one practical action each day. Capture what you noticed and what you will do next.

DAY	ACTION	DONE	WHAT I NOTICED / NEXT STEP
16	Identify a capability gap.	☐	
17	Ask a coaching question.	☐	
18	Give specific feedback.	☐	
19	Delegate authority with the task.	☐	
20	Offer a stretch opportunity.	☐	
21	Diagnose with all four lenses.	☐	
22	Address a team conflict.	☐	
23	Improve an onboarding step.	☐	
24	Review access to opportunity.	☐	
25	Audit your energy and time.	☐	
26	Pause before responding under pressure.	☐	
27	Explain a change with context.	☐	
28	Bring options, not only a problem.	☐	
29	Complete a team health check.	☐	
30	Write your next 90-day commitment.	☐	

My Manager-Leader Action Plan

Use what you learned to define the leadership practices you want to carry forward.

My strongest lens and how I will use it well:

The lens I most need to strengthen:

A management habit I will improve:

A leadership habit I will improve:

Work I will delegate instead of taking back:

A conversation I need to have:

How I will measure progress over the next 90 days:

MY COMMITMENT

Signature: _____ Date: _____

KEEP DIAGNOSING. KEEP LEARNING. KEEP LEADING.

Strong management makes work possible.
Strong leadership helps people move through it together.

Return to these tools whenever priorities change, trust is tested, capability must grow, or the work begins to drift.

MORE RESOURCES

Visit kbidigital.net/managelead for articles, updated resources, and additional printable tools.

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