

## The "How to" of Situational Leadership

Combining two threads:  
Leading from the Middle  
& How Leaders Think.

---

---

---

---

---

---

---

---

By the way...

Waddell and Reed Does Not  
Provide Legal or Tax Advice  
Services.

---

---

---

---

---

---

---

---

## Leaders vs. Managers

- You manage a job description...
- You lead to where you must take the organization 5 or 10 years from now.

*The next generation of job descriptions in your office will incorporate, as matter of fact, the things for which you were visionary.*

---

---

---

---

---

---

---

---

## Leading from the Middle

Regardless of what our title is, we have people above us and we have people below us. We are both followers and we are leaders.

### 1. Choose to be a leader

*Self-preservation sometimes makes the prudent cowards of us all.*

---

---

---

---

---

---

---

---

### 2. Know the Objective

KEEP IT SIMPLE. Determine one primary objective.

### 3. Chart the Course

You already know enough of the collective boundaries, personalities, and priorities in your situation to make a good start.

---

---

---

---

---

---

---

---

### 4. Motivation Vs. Manipulation

If you are trying to influence change for the benefit of others and the organization – you will be motivating. But if your core drive is for your own personal gain – you will manipulate.

---

---

---

---

---

---

---

---

5. Know your culture:

6. Attitude!

All positive change requires positive attitude.

7. Respect the position(s) above you.

- The boss has a vested interest in your success.
- Demonstrate the fine art of followership!

---

---

---

---

---

---

---

---

8. Input from trusted colleagues:

Don't assume your smart enough or creative enough to see all sides of the change equation.

Choose them well – positive leaders like yourself.

---

---

---

---

---

---

---

---

9. Test the Waters:

10. Get Creative:

11. Navigate the course

It's time to start sailing...

Adjust and make course corrections along the way, always keeping in mind the primary objective.

---

---

---

---

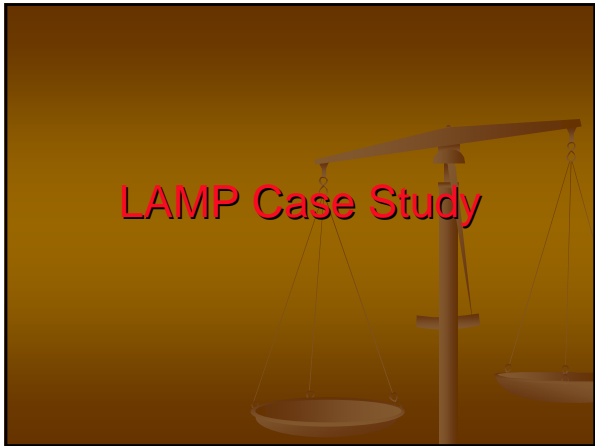
---

---

---

---

# LAMP Case Study



---

---

---

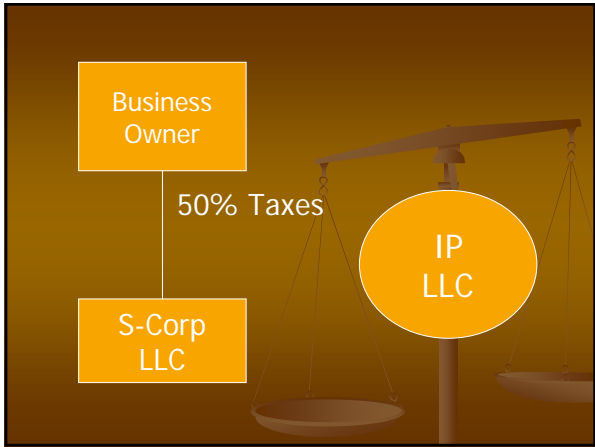
---

---

---

---

---



---

---

---

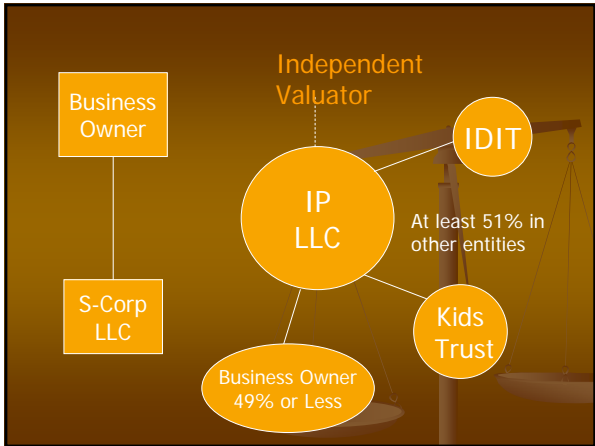
---

---

---

---

---



---

---

---

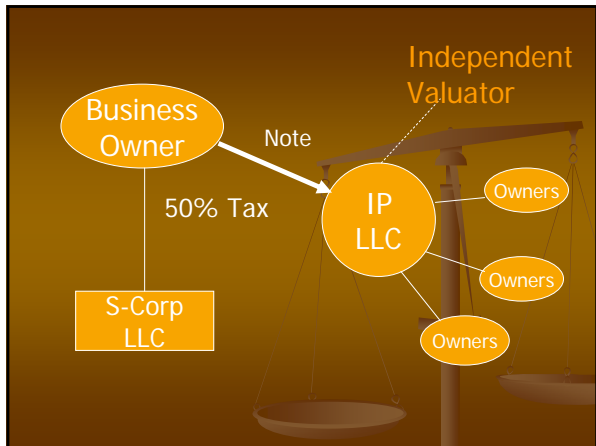
---

---

---

---

---




---

---

---

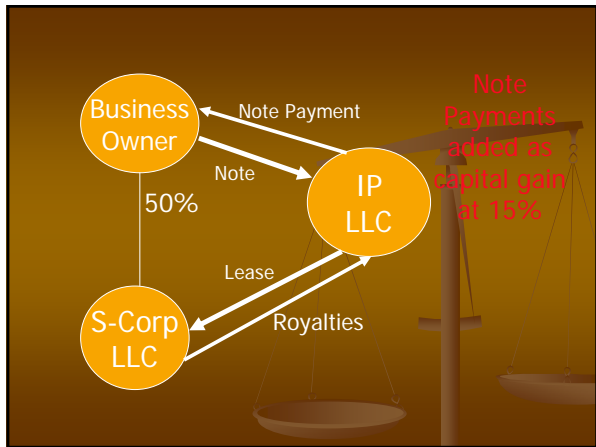
---

---

---

---

---




---

---

---

---

---

---

---

---

### Orthodontist

- \$750,000 annual income – 3 times greater than average
- \$4 million value of practice
- \$1 million – average loan available to purchase practice
- Potential loss of \$3 million in equity

---

---

---

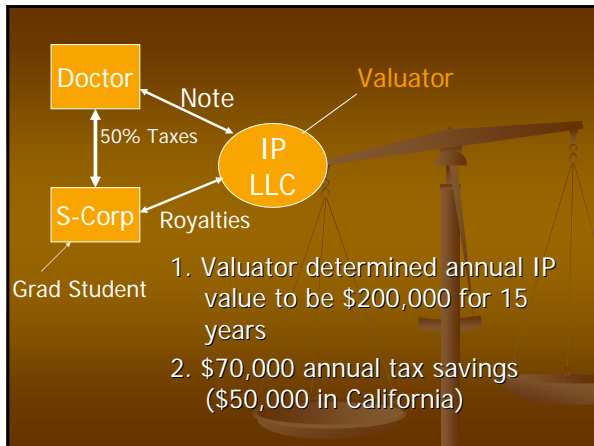
---

---

---

---

---




---

---

---

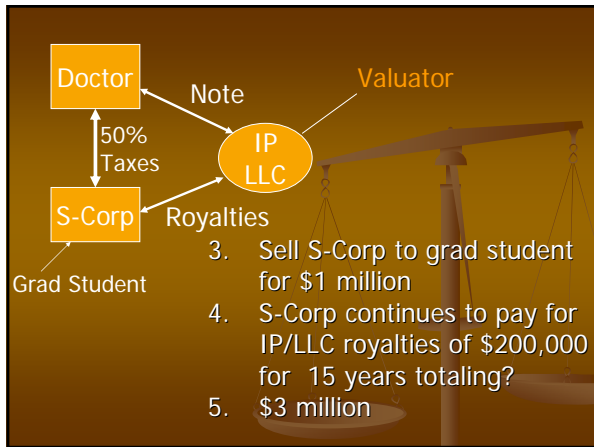
---

---

---

---

---




---

---

---

---

---

---

---

---

A little exercise in the "HOW TO" think as a leader.

Now as a leader, how might we use this situation and information?

1.

2.

3.

4.

---

---

---

---

---

---

---

---

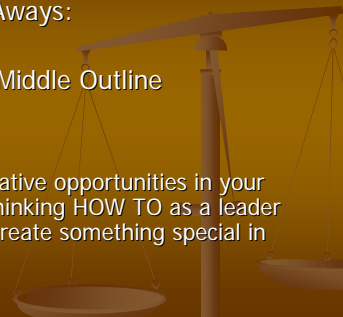
## Unique Motivating Factor

Transferable Take Aways:

Leading from the Middle Outline

Case Study:

Look for unique, creative opportunities in your backyard, then by thinking HOW TO as a leader follow the steps to create something special in your own situation.



---

---

---

---

---

---

---

---