

LEADER PLAYBOOK

Philosophy, Metrics & Performance

CLARITY IS EMPATHY.

Ambiguity causes burnout. Vague expectations force teams to guess what success looks like. This document removes the guesswork.

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Foundation and Leadership Philosophy

Before You Read This

What this playbook is and what it is not

This is not a guarantee.

Read it anyway. The practices here shift the odds. They do not eliminate them.

WHAT YOU CANNOT CONTROL

Project management has a term for this: Enterprise Environmental Factors. Every project runs inside conditions the team did not create. Market shifts, org restructures, budget cuts, leadership changes. Those factors shape what is possible whether anyone plans for them or not.

Your career is the same. Business priorities change. Headcount gets frozen. A reorg moves the goalposts. A strong performance review does not override a hiring freeze. None of that is personal. But it is real, and it belongs in any honest conversation about outcomes.

Pretending those factors do not exist is not optimism. It is bad planning.

WHAT YOU DO CONTROL

Your execution is yours. How your metrics trend. How prepared you walk into a 1:1. Whether you set goals with intention or let the quarter drift. How much you invest in your own development. That part does not belong to the environment.

Controlling your execution does not cancel out the external factors. What it does is raise your probability. The people who tend to reach their goals are not the ones who got lucky with timing. They are the ones who showed up consistently enough that timing eventually worked in their favor.

That is the only claim this playbook makes.

THE OPERATING PRINCIPLE

I am most likely to reach my desired outcome if I am consistent. Consistent does not mean perfect. It means I show up prepared, I know where my numbers stand, and I keep investing in getting better. That is what this playbook asks for.

On the IDP section: The Individual Development Plan at the end of this playbook is optional. Not everyone on this team is in the same place in their career. If your focus right now is executing your current role well, start there. The IDP will be here when you need it.

Foundation

Where I come from and what I believe about leadership

BACKGROUND

My career started in the Army. That shaped how I think about leadership, accountability, and what it takes to build teams that hold when things get hard.

The most important thing the military gave me: when a team fails, the leader failed. You do not point at the people. You look at the environment you built for them. Then you fix it.

After the Army I went back to school twice. A B.S. in Applied Sociology to read human behavior the way an engineer reads a broken system. Then an M.S. in Project Management from USC because knowing what is wrong does not fix anything.

I also hold a Lean Six Sigma Yellow Belt and a Scrum Master certification. I am currently pursuing my PMP.

I work now at the intersection of operations and AI workflow integration. Same principle throughout: find the friction, build the fix, give the team what they need to move.

THEORY Y LEADERSHIP

Before I ever read Douglas McGregor, I was reciting the NCO Creed in front of senior leaders across multiple organizations. Committing that to memory did something. The obligation to know your soldiers and always place their welfare above your own is not a management philosophy. It is a standard. It was the first time I understood that a leader's job is fundamentally about the people beneath them, not the mission above them.

McGregor's Theory Y gave me the academic framework for what the Army had already built into me. The starting assumption is that people want to do good work. They are not avoiding effort. They are not waiting to be pushed. They need the right conditions.

Creating those conditions is my job. Clear expectations. Tools that work. Feedback that goes both ways. When those things are in place, I get out of the way.

Theory Y is not soft. The standards here are high. What changes is the reason behind them. High standards built on trust land differently than high standards built on fear. You own your work. I own what is in your way.

01 CLARITY IS EMPATHY.	02 DIAGNOSE THE SYSTEM.	03 OWN THE ENVIRONMENT.	04 EXECUTION IS EVERYTHING.
Ambiguity forces guessing. I remove the guesswork.	When a good team fails, the process failed them.	My team always has a path forward. That is my job.	A plan that stays on a slide is not a plan.

Foundation

The skills that enable my work and what I am always building

Six capabilities run through everything I do regardless of the organization, the domain, or the tech stack. Each one has an active edge — something I am currently working to go deeper on. The list is stable. The depth keeps moving.

Data Analytics and Statistical Research

Design structured studies, clean and query datasets, and read behavioral patterns through numbers. I have worked through large data blocks to find what the volume is actually saying and built frameworks to act on it.

Going deeper on SQL and statistical modeling. Building programs that go past reporting and into diagnosis — finding what the numbers predict, not just what they describe.

Business Process Mapping

Document complex workflows visually, find where work slows down or breaks, and map technical transitions across platforms. I have done this for migrations, AI workflow builds, and multi-step operational procedures.

Getting sharper at process design across different org structures — not just mapping what exists, but designing what should replace it.

Root Cause Analysis

Find the structural defect behind a failure instead of treating what shows up on the surface. I stop errors at the source and build documentation so they do not come back.

Pushing RCA further into data-driven diagnosis — using the numbers to find problems before they become visible to the team.

Agile Framework Administration

Configure tracking systems, break broad goals into sprint cycles, and measure team output over time. I have run Agile frameworks across both operational and technical teams.

Connecting sprint retrospectives to actual data so the team improves on something measurable each cycle, not just something discussed.

Project Management

Keep timelines, budgets, and people moving together under pressure across complex, multi-workstream work. I have managed projects from military inventory operations to platform migrations to AI builds.

Pursuing PMP certification. The credential catches up to the track record.

Resource Allocation and Forecasting

Build schedule and resource models, get the right people and capital to the right place, and keep initiatives from drifting out of scope. I have managed large resource portfolios under real operational pressure.

Building forecasting models that pull from live data instead of plans written once and never updated.

Preparing for Your 1:1

You own this meeting. Show up ready.

24 HOURS BEFORE

Pull your numbers.

Know where each metric stands before you walk in. Your manager should not be the one telling you.

Name your blocker.

One thing. Not a list. The one thing creating the most friction right now.

Note a win.

Something moved forward this week. Even small counts. Come in with something you can point to.

Know what you need.

If you want something from your manager, be specific. Vague asks produce vague outcomes.

Check your goal.

Where does your current SMART goal stand? Bring a status update, not a surprise.

GROUND RULES

- You own this meeting, not your manager.
- No status updates that belong in Slack.
- Come prepared or reschedule.
- Honesty goes both ways.

PREPARATION QUESTION BANK

Use these to prepare your thinking before the meeting. Not a checklist. Pick what is relevant to where you are right now.

METRICS AND PERFORMANCE

- Which metric am I most confident in right now, and why?
 - Which metric needs the most attention this period?
 - What is one habit driving my numbers up or down?
 - Can I explain my performance, or am I just reporting it?
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WORKLOAD AND BLOCKERS

- What is slowing me down the most right now?
 - Is there a decision I have been waiting on that I could make myself?
 - Am I spending time on the highest-impact work?
 - What do I need from my manager that I have not asked for?
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CAREER GROWTH

- Is my current work building toward where I want to go?
 - What opportunity have I not pursued that I should?
 - What would I change if I had full ownership of my role?
 - Is my trajectory aligned with my 12-month goal?
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FEEDBACK

- What feedback have I received that I have not acted on yet?
 - Where am I making the same mistake more than once?
 - What is one thing I would change about how I work?
 - What would make me easier to manage or work alongside?
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DEVELOPMENT

- What skill am I actively building right now?
- What gap is most likely to limit my next step?
- What changed about how I work in the last 30 days?
- What would I want to learn if time were not the constraint?

Quantitative Metrics

Numbers tell part of the story. Know which part.

Every role that measures performance uses quantitative metrics. Volume, rate, score, time. The specific names will change depending on where you work. The framework for reading them does not. Before you can manage a number, you have to understand what it is actually telling you.

WHAT QUANTITATIVE METRICS MEASURE

Volume	Rate	Time	Score
How much work came in and how much you handled. Tells you capacity and throughput.	What percentage of something happened. Response rate, resolution rate, completion rate.	How fast. First reply time, handle time, time to close. Speed as a signal of effort and efficiency.	A rating assigned by someone else. Customer satisfaction, quality review, peer feedback.

HOW TO READ YOUR NUMBERS: CENTRAL TENDENCY

Most dashboards show you an average. That is usually the mean. The problem is that the mean is sensitive to outliers. One unusually bad week or one unusually strong stretch can pull your average in a direction that does not reflect how you actually perform most of the time. Before you decide what your number means, you need to know which measure of central tendency you are looking at.

Mean

The average. Add all values, divide by count.

Sensitive to outliers. One very high or very low result moves it. Your mean can look fine while most of your individual results sit below it.

If your mean score is 4.2 but half your results are 3s and a few are 5s, the mean flatters the picture.

Median

The middle value when results are ranked in order.

Resistant to outliers. It tells you what a typical result actually looks like for you, not what the extremes dragged it to.

If your results are 3, 3, 4, 4, 5, 5, 5 the median is 4. That is a more honest read than the mean of 4.1.

Mode

The value that appears most often.

Tells you your most common result. Useful for spotting patterns in scores or outcomes that repeat at a specific level.

If your most frequent score is a 3, the mode surfaces that even when your mean and median both look acceptable.

Workbook: Read Your Numbers

What is the mean for your key metric? What is the median?

If they differ, what outlier is pulling the mean?

What does your most common result (mode) tell you that the average does not?

Qualitative Metrics

What the dashboard does not capture.

Quantitative metrics tell you what happened. Qualitative metrics tell you how. A number can confirm that something went wrong. It rarely explains why. High performers track both. The qualitative signals are often where the real diagnosis lives, and they are the first thing that shows up before the numbers move.

QUALITATIVE SIGNAL TYPES

Tone

How you communicate, not just what you say. Tone shows up in word choice, sentence structure, and how you open and close an interaction. A technically correct reply delivered with the wrong tone can still damage trust.

Effort

Whether the response reflects genuine engagement with the problem. Did you read the full context? Did you address the actual issue or the surface one? Effort is visible to customers even when it is hard to score.

Resolution Quality

Whether the customer actually left with their problem solved. A closed ticket is not the same as a resolved one. Quality means the customer did not need to come back for the same issue.

Pattern Recognition

Whether you notice when the same problem appears across different customers. High performers flag patterns. They do not just close tickets individually. They surface what the volume is telling them.

HOW TO READ QUALITATIVE DATA

Qualitative data does not come from a single number. It comes from looking at your own work with honest eyes.

Read your interactions. Not to check a box. To see patterns. Are customers repeating themselves? Are you giving generic answers to specific problems? Are you rushing closures without confirming resolution?

Ask for feedback you were not given. Your manager cannot catch every interaction. Pull the ones you felt uncertain about and review them yourself before someone else does.

WHAT THE NUMBERS MISS

- Whether you read the full context before responding
- Whether your answer actually solved the problem
- Whether the customer felt respected, not just processed
- Whether you noticed a pattern across multiple tickets
- Whether you escalated at the right time or just closed early

Workbook: Qualitative Self-Audit

Read your last 10 interactions. What pattern shows up that your numbers do not reflect?

Where is your tone inconsistent with your intent?

Name one ticket you closed that was not actually resolved.

Performance Ownership

Know where you stand. Come with a plan.

THE STANDARD

Hitting the average is not the goal. The law of averages works both ways. Your numbers can look fine while habits underneath are quietly degrading the customer experience.

A metric hit through inconsistent effort is not the same as one hit through reliable execution. I track both.

Exceeding means you can explain your performance. You know what drove the number. You can do it again on purpose. That is the difference between a pattern and a good week.

WHEN YOU ARE TRENDING BELOW TARGET

1 Find it yourself.

Do not wait to be told. Pull your numbers before every 1:1 and know exactly where you stand.

2 Name the cause.

Volume? Ticket complexity? A product knowledge gap? A pattern in the types of conversations you are losing? Get specific.

3 Build a plan.

Decide what changes and when. Bring that to the 1:1 as something concrete, not as a problem to hand off.

4 Execute.

Talking about it in the 1:1 is not the fix. The conversation is a tool. What happens after it is on you.

Workbook: Performance Reflection

Which metric is the weak point right now, and what is the specific cause?

What one habit change would move that metric most directly?

By when will you course-correct?

How will you know it is working?

Goal Setting

SMART goals, owned by you

A goal someone else set for you is a task. A goal you set is a commitment. I use the SMART framework because it forces you to be specific. Vague goals produce vague effort. Every goal you bring to your 1:1 should clear all five of these.

S

SPECIFIC

Say exactly what you are trying to accomplish. Who is involved? What does done look like? If it is fuzzy, it is not ready.

M

MEASURABLE

Name the number, percentage, or output that tells you the goal is complete. If you cannot measure it, you cannot track it.

A

ACHIEVABLE

The goal should stretch you. It should not require resources or authority you do not have.

R

RELEVANT

Connect it directly to your metrics, your growth path, or the team's direction. Goals with no connection to outcomes are hobbies.

T

TIME-BOUND

Every goal needs a date. Without one, urgency evaporates and the goal stays permanently in progress.

Workbook: Write Your Next SMART Goal

Specific: What exactly will you accomplish?

Measurable: How will you know you got there?

Achievable: What resources or support do you need?

Relevant: How does this connect to your metrics or growth path?

Time-bound: What is your completion date?

Individual Development Plan

OPTIONAL

Your growth is your responsibility. I will invest in what you build.

An IDP is not a form you submit once a year and forget. It is a working document that tracks where you want to go and what you are doing to close the gap. Growth paths exist on this team: promotion, skill depth, cross-functional exposure. None of that happens automatically. You have to drive your own development. When you do, I will back it.

VERTICAL GROWTH

Promotion

You want to move up in title, responsibility, or pay. That path runs through consistent performance above baseline, visible leadership behaviors, and a track record of owning outcomes rather than completing tasks.

HORIZONTAL GROWTH

Skill Expansion

You want to go deeper where you are. Product mastery, data fluency, technical chops, process improvement. Going deeper makes you harder to replace and sets up whatever comes next.

LATERAL GROWTH

Cross-Functional Work

You want exposure beyond this role. A product feedback loop, an internal project, a skill that bridges your role to another team. Lateral experience builds perspective that a single role cannot give you.

Workbook: Your IDP

Where do you want to be in 12 months? Be specific about role, skill, or responsibility.

What is the biggest skill gap between now and that goal?

What will you do in the next 30 days toward that goal?

What do you need from your manager?