

From Entry-Level to Institutional Leader: Charting Your Path Through CBMI and Beyond

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Welcome & Session Purpose

From participation to intentional leadership growth.

- This session is about using CBMI as a leadership development platform.
- You will connect your current work to future institutional impact.
- You will leave with a clearer path, stronger language, and practical next steps.



Framing question: What leadership role or level of influence are you intentionally preparing for?

Our Time Together

1:45 PM - 3:30 PM | 105-minute professional development session.

1:45-1:55

Welcome & Leadership Journey

frame the path and define intentional growth

1:55-2:15

Institutional Leadership Pathways

understand scope, readiness, and influence

2:15-2:35

CBMI to Leadership Evidence

translate learning into professional advancement language

2:35-2:55

Readiness Map Activity

identify strengths, gaps, CBMI connections, and next steps

2:55-3:15

Visibility & Strategic Positioning

build relationships and communicate impact

3:15-3:30

Action Plan & Commitment

create 30/60/90-day next steps

By the End, You Will Be Able To

Outcomes for charting your leadership pathway.

- Differentiate strong performance from leadership readiness.
- Identify institutional leadership competencies needed for future influence.
- Translate CBMI learning into leadership evidence.
- Map visibility, relationships, and strategic positioning opportunities.
- Build a practical 30-, 60-, and 90-day leadership action plan.



Leadership Direction Conversation...

Start by naming the direction you are preparing for.

REFLECTION

- 1 What role or level of influence are you preparing for over the next 1-3 years?
- 2 What problems do you want to be trusted to solve?
- 3 What leadership behaviors must others see consistently from you?

Prepare to share one insight.

The Central Message

Career advancement is not just about moving up.

**Your next leadership level requires evidence,
visibility, relationships, and intentional
positioning.**

The Central Message

Career advancement is not just about moving up.

What Does That MEAN?

Advancement vs. Readiness

One is a title. The other is a pattern of behavior.



Role-Based Advancement

- A new title or position
- More responsibilities
- Formal authority

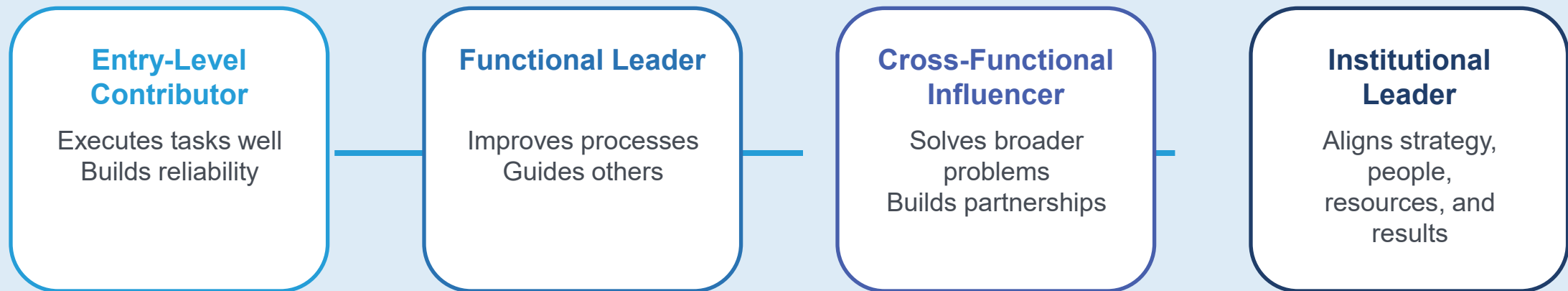
Leadership Readiness

- Trusted judgment
- Institutional perspective
- Evidence of impact

Career Growth Is Rarely Linear

Institutional leadership is built through expanding scope and influence.

LEADERSHIP PATHWAY



The goal is not to rush the path. The goal is to build visible evidence of readiness at each stage.

How Expectations Change as Scope Increases

Leadership growth requires a broader view.

1

Early Role

Do your work well

Reliability + competence

2

Team/Unit Influence

Improve the work around you..

Coordination + judgment

3

Institutional Influence

Connect people,
priorities, risk, and
resources

Strategy + enterprise thinking

Institutional Leadership Competency Compass

The competencies that help leaders earn trust across the institution.



Discussion: Strong Employee vs. Future Institutional Leader

Move beyond job performance and define leadership readiness, NOT potential.

DISCUSSION

- 1 What is the difference between being a strong employee and being viewed as a future institutional leader?
- 2 What behaviors signal readiness?
- 3 What behaviors may create concern?
- 4 What must change as scope and visibility increase?

Share one behavior that strengthens leadership readiness.

Behaviors That Signal Leadership Readiness

Readiness is often observed before it is formally recognized.

- Owns problems beyond the job description.
- Communicates clearly across audiences.
- Uses data and judgment to make recommendations.
- Builds trust with peers, supervisors, and partners.
- Handles pressure without losing professionalism.
- Connects daily work to institutional priorities.



Behaviors That Can Create Concern

Talent is not enough if leadership behaviors are inconsistent.



Waiting to be noticed instead of communicating impact.



Staying too narrow in one functional area.



Avoiding visible leadership moments.



Not building relationships beyond the department.



Taking on work without connecting it to strategy.



Assuming hard work alone equals readiness.

CBMI as a Leadership Development Platform

More than a course sequence.



- Strengthens leadership language and institutional understanding.
- Expands cross-functional thinking across business operations.
- Creates examples you can use in interviews, reviews, and promotion conversations.
- Helps you explain how you think, lead, and solve problems.

Translate CBMI Learning Into Leadership Evidence

Learning has power when you can connect it to outcomes.

What you Learned

Concept, model, course,
tool, or conversation



How you Applied It

Project, process,
decision, analysis, or
behavior



What Changed

Improved result,
stronger judgment,
better communication,
or greater impact



Do not only say you attended CBMI, describe how CBMI changed your leadership practice.

Where Leadership Evidence Shows Up

Use CBMI learning in multiple advancement conversations.

Resume / Bio

Translate competencies into impact language.

Annual Review

Connect development goals to institutional priorities.

Promotion Conversation

Show readiness and evidence, not just interest.

Interview

Tell a clear story of judgment, scope, and results.

Development Plan

Identify the next skill, exposure, or relationship.



Quick Reflection: CBMI Connection Check

Identify one CBMI learning moment that belongs in your leadership story.

QUICK WRITE



1 What did you learn?

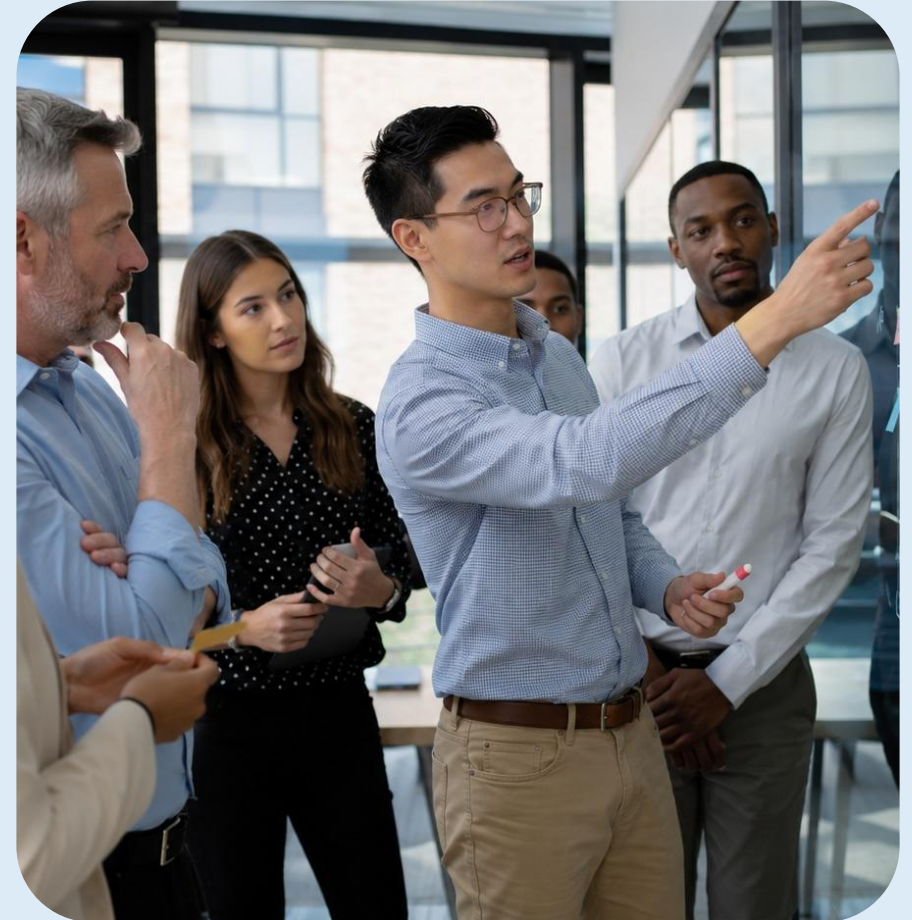
2 How have you applied it?

3 How can it become part of my leadership story?

Current Role & Leadership Readiness Map

A practical tool for turning your role into a leadership pathway.

- Your current role already contains leadership evidence.
- This map will help you identify what you manage, influence, or support.
- It also reveals gaps in skill, exposure, visibility, or relationships.
- Your goal is to name one 30-day step that moves you forward.



Activity: Complete Your Leadership Readiness Map

Be specific enough that your next step is actionable.

MAPPING

Mapping Area	Guiding Question
Current Role	What do you manage, influence, or support?
Current Evidence	What outcomes demonstrate your leadership readiness?
Current Gaps	What knowledge, skill, exposure, or relationship do you still need?
CBMI Connection	Which CBMI course, topic, or experience helped you close that gap?
30-Day Step	What action can you take within 30 days?

Reflective Share: What Your Map Reveals

Listen for patterns, strengths, and next-level opportunities.

PAIR SHARE



- One strength you can leverage now.
- One gap you need to close.
- One CBMI connection that strengthened your path.
- One next step you will take within 30 days.



Note: ask one clarifying question that makes the next step more specific.

Debrief: What Does Your Map Tell You?

Leadership growth becomes clearer when the pattern is visible.

Leverage

What can you use more intentionally?

Gap

What must be developed or strengthened?

Evidence

What results need to be documented?

Visibility

Who needs to understand your impact?

A pathway is not a wish list. It is a set of visible steps connected to institutional value.

Visibility Is Not Self-Promotion

Visibility is strategic communication about value and impact.

Good work cannot speak for itself if no one understands the impact.

- Make the work visible without making it about ego.
- Connect your contribution to institutional priorities.



What Leaders Need to Know About You

Visibility answers the questions decision-makers are already asking.

Judgment

How do you think through complex problems?

Scope

Can you see beyond your immediate role?

Impact

What measurable value have you created?

Collaboration

Can others trust you in cross-functional work?

Readiness

What evidence suggests you can handle more?

Alignment

How do your goals support institutional priorities?

Strategic Visibility Channels

Choose visibility opportunities that build evidence of readiness.



- Cross-functional projects that expand institutional understanding.
- Process improvements tied to outcomes, quality, risk, or efficiency.
- Data-informed updates that communicate progress and insight.
- Committee work where you can contribute thoughtful judgment.
- Stretch assignments that build a next-level competency.
- Applied CBMI learning translated into practical action.

Mentor, Sponsor & Network Map

Relationships shape access, feedback, visibility, and opportunity.

Mentor

Gives advice and perspective

Sponsor

Speaks for your readiness when you are not in the room

Peer Network

Shares information, collaboration, and insight

Supervisor

Connects goals to performance and development

Cross-Functional Partner

Expands your view of institutional priorities



Activity: Map Your Leadership Circle

Identify the relationships that support your next level.

NETWORK MAP

1 Who gives you feedback?

2 Who challenges your thinking?

3 Who has seen your impact?

4 Who can speak to your judgment?

5 Who knows your goals?

6 Who can connect you to future opportunities?

Discussion: What is one relationship you need to strengthen to support your next level of leadership growth?

The Advancement Conversation

Prepare to discuss readiness, not just ambition.

- Name the level of influence you are preparing for.
- Connect your goal to the institution's priorities.
- Share evidence of judgment, scope, and impact.
- Ask for feedback on the gaps you must close.
- Request opportunities that build readiness, not just workload.



Build Your Leadership Positioning Statement

A clear statement helps others understand your direction.

“I am preparing to contribute at the next level by strengthening my ability to _____, demonstrating impact through _____, and using CBMI learning to _____.”

Example: “I am preparing to lead cross-functional operational improvements by strengthening my data-informed decision-making, demonstrating impact through process outcomes, and using CBMI learning to connect finance, people, risk, and strategy.”

Prepare a version that sounds like you and reflects your actual goals.

Not Every Opportunity Moves You Forward

Leadership growth requires intentional decision-making.



- Some opportunities build next-level competencies.
- Some increase visibility or institutional understanding.
- Some align with institutional priorities and create evidence.
- Some only add workload without advancing your pathway.

Decision Filter: Should I Say Yes?

Use a strategic lens before accepting new responsibilities.

Competency

Does this build a next-level skill?

Visibility

Will the right people understand your contribution?

Alignment

Does it support institutional priorities?

Evidence

Can it produce results you can document?



If the answer is “no” to every question, it may be work, however it may not be strategic development.

Scenario-Based Table Discussion

Should I say yes?

SCENARIO

You are asked to co-lead a cross-functional project to improve a process that affects students, staff, compliance, and budget. It is outside your current job description and will require extra meetings.

1

Does this build a next-level competency?

2

Will it increase visibility or institutional understanding?

3

Does it align with institutional priorities?

4

What evidence of readiness could come from this opportunity?

Scenario Debrief: What Evidence Could This Create?

Turn opportunity into a leadership story.

- Evidence of cross-functional collaboration.
- Evidence of operational planning and follow-through.
- Evidence of data-informed decision-making.
- Evidence of communication across different audiences.
- Evidence of judgment when balancing risk, people, and process.



Common Advancement Barriers

What often slows professional growth.

Waiting to be noticed

Staying in one lane too long

Avoiding visible leadership moments

Not building relationships beyond the department

Failing to align goals with institutional priorities

Not documenting impact

The goal is to identify the barrier early, before it quietly becomes your reputation.

Translate Daily Work Into Leadership Evidence

Routine work can become readiness evidence when framed clearly.



Task

What did you do?

Context

Why did it matter?

Action

How did you lead or solve?

Impact

What changed because of it?

Your Leadership Evidence Story

Use this structure to make your impact clear.

**“In my role, I noticed _____. I took action by _____.
The result was _____. This demonstrates my readiness
to _____ because _____.”**

Use this in performance reviews, interviews, and development conversations.
Keep the story specific, outcome-focused, and connected to institutional value.

Beyond CBMI: 30/60/90-Day Leadership Action Plan

Turn reflection into execution.

- Your plan should include visible action, not just private intention.
- Each step should connect to readiness, visibility, relationships, or institutional impact.
- Make the plan small enough to start and meaningful enough to matter.



30-Day Leadership Action

Start with a conversation, update, or visibility step.

What conversation, update, or visibility step will you take within 30 days?

- Schedule a development conversation with your supervisor.
- Share a data-informed update on a project or improvement.
- Ask for feedback on a next-level competency.
- Clarify one institutional priority connected to your work.

60-Day Development Action

Build one skill, project, or relationship.

What skill, project, or relationship will you develop within 60 days?

1. Volunteer for a project that expands cross-functional exposure.
2. Study a CBMI concept and apply it to a current problem.
3. Strengthen a relationship with a mentor, sponsor, or partner.
4. Identify one operational problem you can help solve.

90-Day Evidence Action

Document and communicate leadership readiness

What evidence of leadership readiness will you document or communicate within 90 days?

1. Write a concise impact summary for a completed project.
2. Capture evidence of a process improvement or outcome.
3. Update your resume/bio with leadership evidence.
4. Prepare a leadership story for your next professional conversation.

Coaching: Strengthen the Plan

A strong plan should be clear, realistic, and connected to readiness.



- Share your 30/60/90-day plan with a mentor, etc.
- Mentor asks: What is specific? What is missing? What evidence will this create?
- Revise one action so it becomes more visible or more aligned to institutional priorities.



Final check: Does this plan move you toward your leadership role or the level of influence you named at the beginning?

Commitment Statement

Name the leadership move you will make next

COMMIT

I will stop...

I will start...

I will strengthen...

I will ask for...

I will document...

Share one statement – any Volunteers?

Key Takeaways

Charting your path through CBMI and beyond.

Intentionality

Career progression requires planning, not passive waiting.

Evidence

CBMI learning should become visible leadership evidence.

Visibility

People need to understand your judgment, impact, and readiness.

Relationships

Mentors, sponsors, peers, and partners shape access and growth.

Action

Your next step should be specific, visible, and tied to institutional value.

Closing Reflection & Q&A

From entry-level to institutional leader.

Your leadership path is not only about where you are trying to go.

It is about how intentionally you build readiness, evidence, visibility, and relationships along the way.

Q

What is one action you will take within 30 days to chart your leadership path beyond CBMI?

