

Hargrove & Associates Management Consultants
Executive Coach's Final Report
Sally M. Sample
Regional Director, Any Corporation

Introduction and Purpose

Executive Coaching is a collaborative partnership between a middle to upper-level executive, her or her organization and the professional coach. The purpose of their partnership is to:

- ⇒ Develop individual managerial talent
- ⇒ Achieve identified business results

Appropriate targets for coaching are those high potential individuals with the need to leverage current strengths and build key competencies to achieve strategic objectives. These individuals have high potential for impacting the company's performance and effecting business results. They have a commitment for achieving personal growth and development.

The coaching process typically covers a six-month time frame, but may be extended as circumstances dictate and if objectives have not been met. HMC Coaches work closely with senior managers and HR Departments to modify assessment and coaching services, as necessary, to ensure that the objectives of the individual and the sponsoring company are achieved. The coaching process includes the following phases:

Phase 1 – Information Gathering and Assessment.

The process involves the use of personality tests such as the California Personality Inventory (CPI), in-depth background interview, 360° feedback interviews with direct reports, selected peers and relevant others as indicated, on-the-job observation and an in-depth meeting with the supervising manager.

Phase 2 – Development Plan

Once the performance gaps are identified, a customized road map for addressing development needs is created. The plan is discussed and agreed upon by the coached individual, their supervising manager and other relevant persons from whom support is required.

Phase 3 – Coaching and Monitoring Performance.

The executive engages in activities designed to enhance self-awareness, build competencies, and achieve results. Regular meetings are scheduled with on-going access to coach for advice, support, monitoring and feedback.

Phase 4 – Evaluation and Follow-up

Progress toward achievement of objectives is measured. A long-range plan identifying future areas of focus is developed and discussed.



Coaching Overview

This report describes the coaching relationship between Sally Sample and her Executive Coach, Faye Hargrove during the period of June through December 2003. During the six-month period Sally was extremely committed to strengthening her leadership profile and was able to implement many adaptations to her leadership style in a short period of time.

Phase I ---Assessment

Sally's assessment was completed in June 2003 and included the following components:

1. The coaching process began with separate in-depth interviews with Sally and her manager on June 1, 2003. The interview was designed to establish goals and expectations for the coaching outcomes and to assess Sally's and her manager's perception of current areas of strength and development opportunities.
2. ***The California Psychological Inventory (CPI)***-- The CPI is a self-administered questionnaire that measures multiple dimensions of an individual's style as it might relate to work, relationships, or life in general. Individuals taking the inventory answer questions in terms of beliefs, values, preferences, and past behaviors. As such, the CPI is a "self-presentation" of a person's interpersonal style, or personality. The CPI report is designed to increase the manager's awareness about the personality characteristics that can drive specific behaviors and contribute to management and leadership styles.
3. ***360 Feedback Interviews***-- The 360° assessment is a vehicle for providing managers with an honest assessment of their management behavior from those most directly affected by it: their peers, direct reports and superiors. It is a valuable tool for providing tangible insights into a person's assets and limitations and to assist in creating developmental plans. It allows managers to discover important gaps that may exist between their own perceptions and those of their co-workers in terms of how they are behaving on a daily basis. . Face-to-face 360° interviews were conducted with each of her direct reports, peers, and managers (See results in Appendix B). The 360° interview questions were centered around the *Any Corporation Eight Leadership Essentials*.
4. ***Behavioral Observation/Shadowing***— The shadowing process provides an opportunity to observe the manner in which Sally demonstrates the Any Corporation Leadership Competencies on a daily basis. Sally was observed as she conducted staff meetings and participated with peers and other executive management. Observations of her communication style---including platform skills, her impact on others, the manner in which she provides direction, feedback and follow-up with her subordinates, relationship building, etc., were used as input in the coaching process.

Assessment Results

Personal Style

Sally's personal style is friendly and pleasant, characterized by high initiative and self-confidence. In general, she is highly regarded by her peers, direct reports and upper management. She is quite articulate and has no difficulty making herself understood in either group or individual settings. She



often “shoots from the hip,” and may not take care to use the appropriate level of diplomacy and tact, however. She is aggressive and passionate about achieving the desired results for her organization. Sally demonstrates an interest in and concern for others, particularly her direct reports. They perceive him as caring and fair. She is goal-oriented, conscientious and dependable. She is willing to assume significant responsibility and committed to quality results in her organization.

Interacting with Others

Sally is supportive of her direct reports and frequently makes opportunities to provide public recognition and thank them and others for their contributions. Her focus is often centered on the task at hand, however, and she does not take the time to build the necessary foundation of relationships before forging ahead in a particular direction. This is particularly true with her peers. She appears to be more interested in seeing the task accomplished than in seeking out individual perspectives and concerns.

Sally wields only limited influence over others, especially in her peer group. Her passion for achieving results may get in her way and she attempts to get her ideas across without stopping to ensure that others are on board. Sally tends to be concrete in her approach to others and to accept behavior at face value. She does not read others well, can often be oblivious to social nuances and therefore may not be politically astute. On the other hand, Sally works hard at, and is successful in, molding a cohesive unit of her direct reports

Decision Making

Sally is organized and structured in her approach to work. She demonstrates a mental agility which enables him to develop new and untested approaches to old problems. She tenaciously attends to each daily task and may not always prioritize her time based on issues that are both urgent and critical to her unit. While Sally can execute an effective plan to achieve the desired results, her focus is frequently short term without always formulating a long term strategy for her organization. She is not afraid to question organizational norms and take a stand on an issue, even when faced with opposition. Sally is not restricted to traditional thinking when it comes to problem solving. While Sally makes effective decisions, she often acts too quickly before gathering the necessary input or support from others. Likewise, when others challenge her thinking she goes on the offensive rather than attempting to negotiate and find common ground for agreement.

Phase 2---Development Plan

Assessment results provided evidence of Sally’s strengths and opportunities for development. She is viewed as being extremely intelligent, ambitious and effective at achieving the bottom line results with a high degree of energy and integrity. Targeting areas for development allowed Sally to strengthen her leadership profile.

As a result of the assessment process, three primary focus areas were targeted for development. The focus areas were taken from the competencies identified by the company as key leadership traits expected of Any Corporation managers (See attachment A). The target areas were ***Aligns Performance for Success, Communicates Openly and Effectively*** and ***Demonstrates Business Knowledge and Technical Savvy***. An action plan was developed to strengthen these areas.



Specifically, Sally found that she needed to enhance her ability to identify those issues that were urgent and critical from the less critical or unnecessary tasks that gained her attention during the course of a typical day. Therefore, she focused on setting priorities for herself and her work group. Sally also committed to providing better communication to executive management and to her staff, to providing more comprehensive background information when delegating tasks and to clarifying her expectations when providing directives. In addition, Sally committed to improving her presentation skills. In particular, she focused on revising both the content/structure and her platform style when making presentations or presenting business cases.

Process 3 – Coaching and Monitoring

A coaching relationship can only be as effective as the executive is willing to maintain an open attitude toward experimenting with new perspectives and behaviors. In her efforts to address the target areas, Sally was willing to take risks in order to focus on her growth within the context of current and future roles at Any Corporation. As a result, she made several adaptations to her leadership style. She began to chronicle her activities in a journal as she carried out her daily activities. Additionally, she instituted practices and engaged in activities to further enhance her development as an Any Corporation Manager. These include the following activities.

Aligns Performance for Success

- Defining the mission for her organization. Specifically articulating the expected outcomes of the collective efforts of her organization.
- Creating a written vision and mission statement for her work group and sharing her personal goals and the group goals with her organization.
- Creating a work plan for 2004.
- Reading **First Things First**, by Stephen Covey:
- Conducting a time audit of daily tasks to identify those tasks that were urgent and critical to achieving her unit's mission. Using Covey's framework for differentiating important/urgent from not important/not urgent she devised a strategy for structuring her work day to align with her stated priorities.
- Carving out a time for reflection/integration during the course of the day. Sally committed to using her lunch hour for the purpose.
- Broadening the assignments of her direct reports and sharing more clearly with them the expectations and overall objectives of the tasks to create a context for the directives she provides.
- Learning to ask three important questions to guide her actions at each briefing meeting---a) "How does the current situation affect my organization?" b) "What actions are necessary on my part?" c) What are the implications for "down the road?"

Communicates Openly and Effectively

- Strengthening relationships with critical internal customers who impact the successful completion of projects managed by Sally's group. Sally set up regular meetings with peers to share information and keep abreast of project updates.



- Revising the content of her business case presentations to minimize the analytical focus and shift the emphasis to providing background information, current status and future implications as they relate to the “big picture.”
- Following up directives with e-mail correspondence to confirm and clarify understanding.
- Enhancing team meetings by creating an agenda and summarizing action items.
- Committing to join a local business or professional organization for networking/mentoring opportunities with other business professionals.
- Increasing the degree to which the successes of her direct reports are recognized at staff meetings

Demonstrates Broad Business Knowledge and Savvy

- Committing weekly time and regular trips to the E-Center to research related to the business and gathering competitive intelligence.
- Meeting with Director in Marketing Services to gain her perspective on the finance issues related to project management.
- Shadowing internal customers to broaden her perspective of the business.
- Seeking a mentor to broaden her perspective of the business.

Phase 4---Evaluation and Follow-up

Sally’s actions aimed at strengthening her leadership skills during the six month period were aggressive and focused. The impact of her efforts are better assessed over a period of time. Some immediate results were noted in the follow-up interview with Sally’s manager, which was held on December 12, 2003. She might continue her development by joining a local Toastmaster’s organization to increase confidence in her platform skills.

Sally’s ability to build relationships is a strength that can be leveraged to lead to success in her development efforts if she remains focused. Future target areas might include increasing her willingness to address performance issues in a timely fashion.

Summary

While she is regarded as intelligent, effective and personable, Sally Sample felt the need to strengthen her leadership profile. Her profile of leadership competencies shows a number of areas of strength and areas clearly requiring her attention. The process of self-development described in this report required a great deal of commitment on Sally’s part to address the specific targeted areas and take the necessary action for improvement. Her sincere interest in participating in her own development was critical. Sally invested her time and took the necessary risks to engage in activities that may have formerly been outside her comfort zone and her routine mode of managing. Her efforts were successful and will have a positive long term impact on her work group and the corporation as she continues her growth as a leader.

