Stakeholder Centered Coaching® Playbook

2021

by
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Chris Coffey
Marshall Goldsmith

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Preface

This Playbook is based upon years of experience working with successful leaders who were willing to do what it takes to becoming better leaders in their future. Marshall Goldsmith developed the underlying concepts, philosophy and methods found in this guide while working with exceptional leaders who had risen to the most senior levels in major corporations. Anyone who follows this process will improve as a leader and be able to sustain that improvement. Having stated that, the process does not work 100% of the time. Ask yourself if any of the following conditions exist for the person you are coaching:

- **Lack of Commitment** – This leader is not willing to make a sincere effort to change. What is described here will work only if the person is willing to implement the disciplined process described in this guide.
- **Wrong Background** – If the person lacks the intelligence, experience, or functional skills to do their current job, don't expect the material in this guide to help. The focus here is on improving leadership behavior.
- **Written-off** – The leader has been written-off by the company. If that is the case, don't bother going through this process in an attempt to save this person's job. It may, however, help a great deal for this person's next job.
- **Wrong Mission** – What is described on these pages is a "how to get there" process, not a "where to go" process. If this leader has the wrong focus and is heading in the wrong direction, this guide is not what will help gain the knowledge or cognitive skills required.
- **Ethics Problem** – If this person has an ethical or integrity issues, what we will teach here will not help. This guide is only about improving behavior, not ethics or beliefs.

If none of these conditions exist, what is found in this guide will be of real value. It is written in simple, short sections. Each section deals with what to do. Equally important, each section deals with what "not" to do.

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As we are talking about when Stakeholder Centered Coaching® will not work, it is also important to consider if you will be considered qualified to be the coach to a leader. Whether you are an external, or internal, coach, the criteria we consider important are:

- Do you have the needed credibility?
- Can you keep the necessary confidentiality?
- Do you have the needed time for the coaching?

In considering your credibility, besides any relevant experience you have as a coach, we do believe that being certified in Stakeholder Centered Coaching® will enhance your credibility. As this methodology is based on the principles and processes developed and used by Marshall Goldsmith, who has been recognized by the Thinkers50 as the top leadership coach for 10 years in a row, and has been inducted into their Hall of Fame, the process itself adds to your credibility. With your certification you can appropriately say that you use the same methodology that has helped a large number of Fortune 100 CEO's achieve a positive, long-term change in their leadership as recognized and acknowledged by others.

When it comes to confidentiality, this is relevant whether you are an external, or an internal, coach. In both cases, when confidentiality is compromised, your reputation as a coach is severely damaged. As an external coach, it is important to get the "rules stated and agreed upon" regarding what is to remain confidential before any coaching takes place. As an internal coach the challenges are more complicated, yet equally important. It is vital to get agreement right at the start with leaders inside the organization what stays between you as a coach and the leaders, and what will not be confidential.

The final key issue is time. Do you have the necessary time, as perceived by the leader you are coaching, to effectively play your role as the coach? For external coaches, this is a matter of avoiding the overbooking of your professional time. For internal coaches, all of your other responsibilities have to be balanced with the coaching engagements you accept.

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What you find in reading this Playbook is very similar to the practice of any of the martial arts. To succeed you will have to follow a disciplined practice. This practice promises to be simple to understand and difficult to perform. Success here is defined as achieving a positive, long-term change in behavior as recognized and acknowledged by others. This is accomplished through repeated, purposeful, focused attention. This turns into repeated, purposeful, focused action on the part of the Leader.

The disciplined practice described in this Playbook will be of special value to leaders who have already achieved a high level of success and are currently finding that their future success is not coming as easily as it has in the past. What is provided in this guide is a clear methodology to proactively move forward to a new level of ability, skill and confidence.

The Playbook is organized in a building block fashion. First, we will lay out for you a set of beliefs that are commonly held by successful people. It is not too difficult to recognize that our thought patterns and core beliefs have a major impact on our success. What we add to this is the realization that these same beliefs can have a strong influence on keeping us from becoming more successful. In simple terms, those same core beliefs that help us can also limit us in the future.

Our approach is tailored to take advantage of the positive aspects of successful people's beliefs (the upside) and, just as important, to

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Our approach is tailored to take advantage of the positive aspects of successful people's beliefs (the upside) and, just as important, to

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overcome the negative aspects (the downside) that can interfere with further development.

Once we have examined these beliefs, we will be ready (in building block fashion), to add a set of principles that allows us to build on the positive nature of these beliefs and avoid the inhibiting side that keep successful people from moving forward. With an understanding of successful peoples' beliefs, we have developed a set of principles that serve as guideposts to the underlying methodology of Stakeholder Centered Coaching®.

The principles may seem a bit counter-intuitive at first. A few of them break with many of the traditional viewpoint of how coaches help people change. Later these principles will seem to you as self-evident, and nothing more than "organized common sense." Arriving at such a perspective will only come after you have experienced the magic of applying a 7-Step process in a skillful and disciplined manner.

Prepared with an understanding of the impact of the beliefs of successful people and armed with powerful set of principles, you will be ready to learn the proven 7-Step discipline for achieving lasting positive change. Consistent with the theme of this Playbook, we will again provide a balanced view that recognizes there are better and worse ways to behave while using the 7 Step process.

Our efforts are designed to illustrate where to weaken those tendencies that are holding leaders back from future success, as well as strengthen those actions that will ensure future success. The approach presented here is largely based upon helping leaders avoid a set of habitual "Do Not's" and incorporating a set of helpful "Do's" in one's interaction with Stakeholders.

Stakeholder Centered Coaching® is an established process that increases the likelihood of success for all leaders, regardless of position or situation, in improving any behavioral aspect of their leadership.

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What makes Stakeholder Centered Coaching® Unique: A Five-Step Process

STEP 1. Choose a Leadership Goal, Then Stakeholders

Stakeholder Centered Coaching® is not completely different from many coaching methodologies. And, it is unique in a number of key ways. Like most coaching it is based on a leader working to improve on a chosen developmental goal. Our focus is on leadership behavior. Similar to many coaching frameworks, it all starts with the leader selecting a leadership goal to improve. Our methodology recognizes that one of the beliefs of successful leaders is the need to be the one choosing what to work on to improve. What we do is help leaders think through their decision with a cost/benefit analysis that helps leaders determine "Is it worth it" to invest the time and effort. We also insist that the leader's manager is involved and agrees with the decision.

Where our process differs from most (and is unique from this point on) is an emphasis on stakeholders. Once a leader chooses a goal, the other decision that is intimately tied to the chosen goal is to determine - "*Who are the relevant stakeholders*?" Every goal has a set of stakeholders that is relevant to the leader's behavior. These are individuals who are both affected by the leader's behavior (are clear beneficiaries of the leader improving in the behavior) and interact with enough frequency with the leader. Before starting to work on the leadership goal, and similar to the decision on what to work on to improve, the list of stakeholders is validated by the leader's manager.

STEP 2: Enroll Stakeholders as Key to the Process

Unlike most coaching methodologies, the center of attention is placed on stakeholders. The stakeholders are made the center of attention and are recruited as valued members of the change process. Either by the coach, or the leader, each stakeholder is asked to actively participate in the leader's improvement on an ongoing basis. They are asked to provide both ongoing feedback and feedforward to the leader; and, be willing to complete an anonymous and confidential mini-survey on the leaders improvement.

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STEP 3: Plan using Stakeholder Input

Once stakeholders understand their role, the process starts with all the stakeholders being asked to provide suggestions to the leader to achieve the leader's developmental goal. In other words, the Action Plan is not developed based upon your expertise as a coach. The Action Plan is built by the leader and the coach from the initial request for suggestions from the stakeholders.

As the coach, you work together with the leader to construct the initial stakeholder-based Action Plan based, as best as possible, on the input provided by the stakeholders. Relevant parts of the Action Plan are also put into a daily checklist for the leader to consciously keep in his/her awareness while at work. Once developed the plan is distributed to the stakeholders, so they are aware of what to look for in providing feedback and further suggestions to the leader.

STEP 4: Follow-up with Stakeholders

The leader uses the 7-Step involving stakeholder "Do's and Don'ts" to follow-up with each stakeholder once a month. During this brief 5-minute conversation the leader asks for feedback on the prior 30 days; and, any suggestions moving forward for the next 30 days. The leader captures the thoughts of the stakeholders and shares the results with the coach.

Together the leader and coach collaborate on what to add, change, or modify for the coming month based upon stakeholder input. If any new action items are created for the Action Plan, this is communicated to all the stakeholders. Our Action Planning is a continual process of refinement and improvement over the course of the coaching engagement.

STEP 5: Measure Results through Stakeholder Perception of Improvement

Typically, halfway and at the end of the coaching assignment, a formal mini-survey is conducted with the stakeholders to assess the progress made on the leadership goal. This is an online anonymous, and

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With the results of the mini-survey, the leader then writes up an after-action assessment to document: 1) what has happened; 2) why it happened; 3) what insights & learning has taken place; and, 4) what will be taken forward into the future. In a disciplined manner, the leader captures learning from the process. This After-Action Review becomes the leader's story of their development and is usually shared with the leader's manager.

Stakeholder Centered Coaching® Requirements

As a coach, to work with a leader using the Stakeholder Centered Coaching® process, there are only a few requirements. These are:

The Leader:

1. Has a clear leadership goal & agreed upon stakeholders
2. Goes public with the goal with the stakeholders
3. Builds an Action Plan based on stakeholder input
4. Follows up with stakeholders with enough frequency
5. Formally measures results with mini-surveys

Everything else in this Playbook, and what coaches brings from their existing tool kit, is optional and can help the leader achieving a long-term positive change in behavior.

What is described in this Playbook comes from Marshall Goldsmith's, Chris Coffey's and Frank Wagner's ongoing experience working with highly successful people. So, let's start at the beginning by looking at three interrelated and reinforcing beliefs around success that will affect everything that follows in this Playbook.

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The three beliefs that are critical, in our experience, that affect our work as coaches are: "I am successful;" "I choose to succeed;" and, "I will succeed." Together these beliefs are worthy of our attention as we begin working with a leader.

BELIEFS OF SUCCESSFUL PEOPLE

All three of these beliefs: "*I am…*" "*I choose…*" and "*I will be…*" ***successful*** all deal with the relationship between the person and an internal and not necessarily conscious perspective correlated with winning, achievement, and triumph.

Belief # 1 - I AM SUCCESSFUL

The good news for successful people is their copious quantity of self-confidence. The "*I Am Successful*" belief is positively correlated with a willingness to take needed risks and to do "*what you think is right*." If one carefully considers what most leaders are tasked with doing, it becomes readily apparent that courage is a necessary ingredient. The self-confidence to act as a leader is bolstered by this essential personal belief. There are a number of what we like to refer to as *pluses*, or *positives*, connected with the "*I Am Successful*" belief. (A few of these are captured in the table that follows.)

The challenge a leader faces when strongly agreeing with *their own press clippings* and the resulting feeling that they have the universal

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The challenge a leader faces when strongly agreeing with *their own press clippings* and the resulting feeling that they have the universal

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keys to success is also captured in the table below. The CEO of one Fortune 100 Company (who has had many ups and downs on the admiration scale) noted, "*Success can lead to arrogance. When we become arrogant, we quit listening. When we quit listening, we stop changing. In today's rapidly moving world, if we quit changing, we will ultimately fail*." You have to be willing to avoid succumbing to the negative side of believing you are successful.

Plus (+)	**Minus (-)**
▪ Have an overall positive self-image; "winners" in the game of life	▪ Consistently over-rate their performance
▪ Have the courage to apply their ability and strengths	▪ Have difficulty accepting validity of feedback in-consistent with self- image
▪ Possess "contagious confidence"	▪ May discount opinions of people who do not match their level of success

One of the most important lessons found in this Playbook is the willingness of successful people to honestly seek and learn from the input of others. When the minuses associated with the "*I Am Successful*" belief take dominance over the pluses, a leader severely limits the possibility for the needed learning to take place. They only listen to others who validate their inflated self-assessment and are considered a professional peer who has achieved the same "extra ordinary level of success" they have achieved. And, this is a very small number of people.

In the extreme case, the person will only listen to himself, or herself. In other words, they become terminally arrogant. No one else is allowed to help. No one else is considered worthy of providing helpful feedback or suggestions. Since most of the useful information about us comes from others who act as a mirror, the sense of superiority gives credence to the phrase: "successful *in spite of*, instead of *because of*…" our unwillingness to listen to others.

The good news about this belief is the inherent sense of self-assurance that is a requirement to do the tough things needed to truly improve as a leader. The bad news is the accompanying arrogance restricts the

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One of the most important lessons found in this Playbook is the willingness of successful people to honestly seek and learn from the input of others. When the minuses associated with the "*I Am Successful*" belief take dominance over the pluses, a leader severely limits the possibility for the needed learning to take place. They only listen to others who validate their inflated self-assessment and are considered a professional peer who has achieved the same "extra ordinary level of success" they have achieved. And, this is a very small number of people.

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The good news about this belief is the inherent sense of self-assurance that is a requirement to do the tough things needed to truly improve as a leader. The bad news is the accompanying arrogance restricts the

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number of people whose feedback they take seriously. Their unwillingness to seek out, or hear, input on their leadership cuts them off from those who may be their best source of constructive data.

Belief # 2 - I CHOOSE TO SUCCEED

Along with the belief that the leader you are coaching is a successful person, there is another key belief that relates to that sense of mastering one's own fate or controlling one's own destiny. We refer to this belief as "*I Choose to Succeed*." With this belief the leader has a strong need to be in charge of what to work on to improve. No one else is going to make the choice for them. No one else is going to "re-wire" who they are.

Most people resist being told what to do. Especially when the subject matter deals with who they are as a person and what they will become. What we have found is the amplitude of this belief seems cranked way up the more the person sees herself, or himself, as a highly successful person.

The good news is that if the leader you are coaching *chooses* to work on something, the leader will also bring a very strong personal commitment, determination, and ownership to the goal that is set. You will not have to spend a lot of time convincing the leader why this goal was the right choice, as it was a personal choice.

They rely on their own opinions, viewpoints, and observations often to a fault. Successful people live by a code of personal responsibility and self-determination. This belief, just like the others has some incredibly positive aspects, and some challenging negatives.

Plus (+)	**Minus (-)**
▪ High need for self-determination	▪ Disregard input from others
▪ Do what they do because of personal commitment	▪ Can be too superstitious about what to choose
▪ Possess a strong sense of ownership	▪ In their head and heart may not feel the "real me" can, or needs to, change

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The challenge you will undoubtedly face with the dark side of this belief is a nagging fear by the leader who has to make the choice to improve. The fear that many successful leaders may possess is that if they change any behavior this will break the "string of success" that has gotten them to where they are today (the superstition). For example, take a real leader we coached who saw himself as "hard working, dedicated, smart, ethical; and a poor coach." For a long time he had, in various forms, received feedback that he should improve in his coaching skills. He didn't deny this assessment. And, everyone else agreed with it too.

You would think it would be easy for him to choose to improve as a coach to his direct reports. It is hard to argue against the benefits of good coaching. Yet, this executive had been playing a game with himself. A game steeped in the depths of superstition. It begins with a simple truth. He was a highly successful businessman and he had never been a good coach, nor had a good coach. There just might be a correlation? If pushed to change by others to improve in his coaching, the fear can escalate to pure self-delusion.

The belief now takes on the potency of causation. This otherwise smart and logical executive finds himself believing that he is successful because of his past behavior; which includes being a lousy or non-existent coach. For all his confidence in most things, here he possessed little, to no, courage to face this shortcoming. His ultimate conclusion was: "*I am successful because I'm a bad coach. If I start working on this I might become too soft or unfocused on what I should be doing*."

So, we begin to see the dilemma. The strong sense of being in control and taking ownership may lead to a reluctance to take on what is truly important to improve as a leader.

There is good news with this real-life example of an executive who had not been a good coach. After eventually choosing to work on this leadership skill, his thought processes and behaviors changed over time. After becoming a good coach, he admitted to fooling himself for a very long time. He could even laugh at himself for his cleverness at

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hiding this fact from himself and all his misspent energy he had wasted deluding himself.

Remember, just as our beliefs are among our strongest gifts, they can also be our Achilles heel. We need to be mindful that we are powerful enough to play a good game of self-delusion with ourselves. We don't want to admit that we might fail, or even worse, are not capable of doing something well. Here is where we need to come back to the "positive" side of choosing to succeed. Coupled with the positive elements of their beliefs, we bet that successful people will get better at whatever they choose to improve.

Belief # 3 - I WILL SUCCEED

Along with the "*I Am Successful*" and "*I Choose to be Successful*," the third belief is possibly the most important one of all. The first belief deals with the past. The second one deals with the present. The third one deals with the future. The best news for possessing this belief is that the believer will continue to do what it takes to succeed in the future. Obviously, the overriding positive attribute associated with this belief is optimism.

Successful people tend to see a bright future. They are not content on retiring based upon what they have achieved. They are convinced the future holds a promise of even higher levels of success. And, the major reason for this optimism is their self-assurance they will control their own destiny and future, as they have always done so well.

As true believers in themselves, they are not the type to "give up," even in the face of extremely difficult odds. They are not likely to view outside circumstances as a reason to quit. In its pure sense, this belief leads to a "no excuses" approach toward reaching their goal. The virtue of persistence is legendary. The ability to never quit on what they choose to do is one of the major reasons for gaining a reputation for being a successful person. So, what can be the downside of such a belief?

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Plus (+)	Minus (-)
▪ Do not believe that external forces control their destiny	▪ Face the danger of over-commitment
▪ Unflappable sense of optimism	▪ Having to win at all cost; winning too much
▪ Persistent even in the face of difficult odds	▪ Can have a hard time “letting go” of failure

One challenge the leader you are coaching faces with this belief is a real danger of over-committing and drowning in a sea of opportunity. At some point, the leader’s optimism can become a genuine liability. There is an overload point, and a burnout point, for everybody. Even if one thinks differently there are no supermen and superwomen. Knowing when to say “no,” when not to make a commitment, is hard when you have a strong belief that you will succeed with whatever one takes on as a challenge.

There is a line we all cross when persistence takes on the air of foolishness. In life there are times when the right choice is to stop putting out the effort and cut one’s losses. Letting go is painful for everyone. For successful people it can be downright excruciating. Successful people can have an incredibly difficult time admitting they are going down the wrong path. When faced with impending failure, successful people may have a tendency to become even more committed, working even harder instead of re-channeling their energies into more profitable pursuits.

One of the darkest clouds connected with this belief, is a need to win at all costs. This is the saving grace for a successful person when winning is critical and important. The exact opposite occurs when winning really leads to losing. An example would probably be helpful here to understand this point.

A common example we use would be getting into a disagreement with one’s spouse (or significant other) over what to do and winding up going along with their suggestion. After doing what your spouse (or significant other) wanted to do, re-engaging in the decision to show them why they were wrong (Are you “winning too much?”). You may win the argument and lose something more precious.

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Letting someone else win is the right approach in some situations. Unfortunately, a person with an unhealthy addiction to winning and success interprets any situation where they are not the winner as "I am the loser."

In summary, the "*I Am Successful*, "*I Choose to Succeed*," and "*I Will Succeed*" beliefs are wonderful gifts possessed by the leader you are coaching. These are attributes worth exploiting during the coaching. And, these same beliefs can equally challenge your efforts as a coach and clearly get in the way of the leader's future improvements, as Marshall made famous in his first best seller "What Got You Here, Won't Get You There."

Your role as a coach will be to capitalize on the pluses (+) and to orchestrate around the minuses (-) of these beliefs. This *Guide* is intended to help you navigate around these beliefs. Building off of the upside of these beliefs and managing the downside of these same beliefs is at the heart of the work you have in store for yourself as a coach.

The Stakeholder Centered Coaching® approach is grounded in an understanding of these beliefs and the power of a reinforcing cycle of involving others a encouraging self-development. It is also guided by three fundamental principles. These principles come from years of executive coaching experience working with successful people who have been working on personal behavioral change.

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STAKEHOLDER CENTERED COACHING® PRINCIPLES

First Principle: ***Place the attention and focus on stakeholders***

The true leverage points in behavioral change are the people who are interdependent, and work, with, the leader every day. Our approach is to turn these stakeholders into the true coaches of the leader.

Our experience has validated that those around the leader, those who interact with the person you are coaching on a frequent basis, are the best "experts" in how the leader's behavior can improve with them. This approach employs a systems perspective by including a number of stakeholders actively in the process as a vehicle to increase the likelihood that improvement in the leader's behavior becomes a habit.

Our coaching approach is different from most other types of coaching in its emphasis on making the stakeholders the key providers of feedback and suggestions for the leader undergoing development. Our role as formal coaches moves more into the background as an orchestrator, cheerleader, and integrator.

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Second Principle: ***Emphasize FeedForward***

Most coaching and leadership development have focused on a process of feedback as the key to improving. There can be great value derived from receiving constructive and well-timed feedback. **The Stakeholder Centered Coaching® approach breaks with this long tradition by placing significantly more focus on FeedForward over feedback**. FeedForward is a technical term for a very simple process; namely, suggestions for the future.

We have found it is much more effective to be focused on the future versus the past. We cannot do anything about the past. The future is dynamic and unrestrained. FeedForward is a process of asking for suggestions for upcoming action. Remember it is the leader's internal belief set that largely affects action. Successful people have a strong need for influence and control. We all can do something about our future. This takes advantage of the positive components of the three key beliefs held by the leader you are coaching.

Additionally, most of us tend to resist when we are being judged. Do not misunderstand our emphasis on FeedForward as an indictment of feedback. Feedback is an important part of the process described in this guide. It is still needed. The amount of feedback needed, remembering our example of the windshield of a car, is proportionate to the size of the rearview mirror to the windshield. We believe in focused feedback on specific actions over recent events as necessary for our coaching.

As you learn and use the 7-Step process for involving Stakeholders on a monthly basis, feedback will be limited to the immediate prior month's actions the leader has taken. And the focus will be on what the Leader can do to be more successful in the coming month. Remember, the future holds unlimited possibility. The past behind us and cannot be changed. **The principle here is to focus on the future. Focus on what can be done.**

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Third Principle: ***Change behavior and perception in parallel***

It is useful for the leader to work in parallel on changing a behavior and the perception of that behavior by the stakeholders. It is very interesting to note, that those around the leader also need to change. Their perception of the leader's behavior needs to change for success to be achieved. All of us suffer from having perceptions that are incredibly resilient. People do not readily give up their prior assumptions, opinions, and beliefs. Thus, a key aspect of a leader changing and improving is the resulting change the perception of stakeholders regarding that behavior.

The research we have conducted shows a commonsense pattern. That pattern is perception change lags behind the actual behavior change. It takes a number of months of repeat behavior by a leader making the positive change for the stakeholders to acknowledge the change is actually taking place. The simple truth is it takes time for people to change their perception of the leader.

These three principles serve as the underpinning for the 7 Step Involving Stakeholder Process that is described next in this Playbook. As previously stated, our experience suggests that the steps in the process must be rigorously practiced for at least a year before there is certainty that the change will be rooted in enough experience to become permanent. A year is our normal standard. Success in modifying some behaviors can be shorter or take even longer.

Success in this process does not have to take up a lot of time for the leader, for the stakeholders, or for the coach. In fact, using the methodology in this Playbook is very time efficient. Until you have enough experience with this methodology as you help a leader put in practice the 7 Step process, you can focus on whatever specific section of this Guide that is relevant at that time.

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7 Steps for Involving Stakeholder

The practical, and sometimes counter-intuitive nature of the Involving Stakeholder Process is based on an understanding of the three principles that underlie this process and the three beliefs (+) and (-) of successful people. Each step is specifically organized to build off of the positive nature of these beliefs and reduce the negative aspects likely to hold a leader back. The Steps to explain to a leader are:

STEP 1. ASK – The best way to get the gift of others' perceptions is to ask for it. If you are committed to becoming more successful, you will be willing to ask for both suggestions and feedback. Asking is communicated in the spirit of self-improvement and in a way that the opinion of the person asked is valued.

STEP 2. LISTEN – This is far from easy. In listening you will need to accept others' opinions as their perception of reality. In other words, you will avoid judging whether the input you are hearing is "right" or "wrong." Back in 2004, Marshall Goldsmith wrote an article in FastCompany titled: The Skill that Separates. His main point was that listening separates the great leaders from the "near" great.

STEP 3. THANK – As this process will be an ongoing one, successful people understand the value in reinforcing the process as others provide their feedback and suggestions. Just as it takes courage to ask, it often takes equal courage for others to give us their feedback and ideas for improvement. Genuine commitment to improve is shown by expressing your appreciation for the help others are providing.

STEP 4. THINK – It is the mark of a wise person to consider what others say before reacting. For one thing, it helps avoid a tendency many people have for over-reacting. This reaction may be too negative or too positive. You do not want to build a reputation or over committing and setting yourself up to under deliver on your promises. Being thoughtful is a valuable way to be seen when it comes to hearing what others have to say.

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STEP 5. RESPOND – A successful person who committed to improvement will always respond to everyone who provide feedback or suggestions. When others have taken both the risk and the time to provide you with input, they deserve to know what you plan to do about it. In communicating about your own behavioral change, it is wise to keep it simple and positive.

STEP 6. CHANGE – The purpose of the first six steps is to prepare to *do something*. Behavioral improvement necessitates doing more of something, less of something, or something entirely new. The mark of a successful person is keeping the change process alive and moving forward. You will monitor yourself relative to what you are doing to improve.

STEP 7. FOLLOW-UP – This step is really a reminder to use the previous six steps on a regular basis. This means checking in with others in a regimented, disciplined manner. **This follow-up step is, by far, the most important step in the process.** It is the best way to demonstrate to others that you are serious about change.

Our experience suggests that the steps in the process must be genuinely practiced for at least one year before there is certainty that the change will be rooted in enough experience to become permanent and for others to change their perception and give you the credit you deserve for changing. A year is a realistic standard.

The more powerful benefit for the leader is when the process itself becomes habitual. Truly successful people are committed to getting better every year. The greatest gift you give as a coach is when this 7 Step process becomes an ongoing discipline that becomes one of the leader's observable habits.

From our extensive experience coaching leaders, we have found that the actions they take, and the actions they avoid, when checking in with Stakeholders has a lot to do with their eventual success in improving AND getting credit from their Stakeholders that they have made a genuine change.

The Do's and Don'ts we have observed include:

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Do’s & Don’ts of Involving Stakeholders

DO NOT	DO
• Stick with your fan club • Expect instant help • Take up too much of their time	• Include as many as you can • Keep the process upbeat • Vary involvement as needed

STEPS FOR ENCOURAGING DEVELOPMENT

DO NOT	DO

Step 1. ASK

• Wait for a “better time” to ask • Act skeptical or doubtful • Put yourself down	• Be concise • Be specific • Be positive

Step 2. LISTEN

• Use “No,” “But,” or “However” • Make excuses • Exhibit impatience or anger	• Pay undivided attention • Capture what is said • Clarify/Confirm what you heard

Step 3. THANK

• Use a dejected tone • Act artificial • Be insincere	• Say “Thank You” quickly • Use first name (if appropriate) • Be genuine

Step 4. THINK

• Engage in “delusional” thinking • Prove the input is wrong • Validate “this is the way I am”	• Assess benefits of changing • Assess cost of changing • Decide if it is worth it

Step 5. RESPOND

• Critique feedback/FeedForward • Respond to too many things • Over-commit	• Be brief • Be positive • Be future focused

Step 6. CHANGE

• Procrastinate • Give into “feeling like a phony” • Expect instant success	• Apply suggestions in parallel • Maintain momentum • Make change visible

Step 7. FOLLOW-UP

• Dwell on the past • Become complacent • Brag, gloat, or show off	• Politely push for specifics • Reinforce the process • Check your ego at the door

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Overall, you have been successful in involving others when they feel…

- They have contributed to your success
- They have been acknowledged for helping
- They want to continue helping you improve as a leader

You have been successful…

… in ASKING when others see you as:

- Choosing the behavior you will improve
- Wanting to change this behavior
- Working on something important to you

…in LISTENING when others see you as:

- Wanting their input
- Paying undivided attention
- Genuinely hearing their message

…in THANKING when others see you as:

- Appreciative of the feedback/feedforward
- Taking their input seriously
- Willing to respond, once having an opportunity to reflect

…in THINKING when you see yourself:

- Not giving in to superstition or "negative" self-talk
- Doing a levelheaded cost-benefit analysis
- Committed with your decision of what to develop

…in RESPONDING when others see you as:

- Appreciative of help from all stakeholders
- Committed to improve
- Confident you will improve

….in CHANGING when others see you:

- Actively working on what you committed to improve
- Demonstrating success
- Not likely to return to your old habits

….in FOLLOWING-UP when others see you:

- Eager to gain stakeholders insight
- Actually learning from the experience
- Producing measurable results

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What a Leader Needs to Succeed

While Marshall Goldsmith worked with Alan Mulally, the now retired CEO of The Ford Motor Company, Alan told Marshall his biggest challenge was "client selection." He first learned the Stakeholder Centered Coaching® process when Marshall coached him when he ran Boeing Commercial.

His Working Together Principles, coupled with his weekly Business Plan Review process he used with his leadership team in the epic turnaround of the Ford Motor Company, incorporated a very similar framework that underlies Stakeholder Centered Coaching®. Every leader acted as a Stakeholder to the other leaders in overcoming challenges in their key goals to turn Ford around.

The process of involving Stakeholders, and using the 7-Step process with them, requires a person to possess a certain amount of three key qualities. These three qualities are:

- Courage
- Humility
- Discipline

When you consider what we are asking leaders to do when they involve their stakeholders; (namely, to Ask, Listen, Thank, Think, Respond, Change, and Follow-up) discipline is required for all seven steps. Courage and Humility are also needed, and one is likely more important than the other given differences in individual leader's challenges.

From a conceptual standpoint, all of what we are asking a leader to do is easy to understand. And it is not easy for most leaders. The good news is, when these actions become habits, they become so much easier to do.

We have created a little survey that helps you determine the readiness to embark on the Stakeholder Centered Coaching® journey. You can share this with a leader or simply do your own assessment of the fit between what our process requires of a leader and the leader's ability and willingness to practice the skills required effectively.

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The Coachable Leader

In the task of improving yourself as a leader, how willing are you to…

COURAGE

- Honestly look at what behaviors you would benefit from stopping, starting, or changing?
- Communicate to others what you are working on to improve as a leader?
- Ask others for personal feedback/suggestions regarding your own behavior?
- Avoid procrastination or waiting for a better time to try out new behaviors?

HUMILITY

- Ask others to "help you" while working on your personal growth as a leader?
- Truly "listen" to feedback and suggestions about your leadership?
- Show genuine appreciation for feedback/suggestions on your leadership by saying "Thank You?"
- Keep your "ego" in check?

DISCIPLINE

- Stick to a monthly routine of following up with others you asked to support you as you develop new behavior?
- Manage any defensive reactions when others point out what have not done well or what you could do better (i.e., making excuses, getting angry, disagreeing)?
- Spend the needed time to change a behavior that is not comfortable for you?
- Spend a few minutes every day reviewing a checklist of actions you are implementing from your plan to improve?

Scale: Very Willing (5), Willing (4) Somewhat Willing (3), Not Sure (2), Not Willing (1)

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7 Step INVOLVING STAKEHOLDER PROCESS

In summary, the Stakeholder Centered Coaching® approach is a disciplined practice that underlies how successful people get even better over time. This discipline is found in a reinforcing cycle of seven steps the leader uses with his or her stakeholders. By repeating these steps with individuals who are impacted by the leader's behavior, the leader will achieve the long-term, positive change and will receive recognition for this from the stakeholders.

What we have found is the most successful people recruit others to help them change. This is more of an interpersonal process than a solo activity. Changing both behavior and perception becomes significantly more likely with stakeholder involvement. When it comes to behavioral improvement, the greatest source of insight and support are those who are impacted by someone's actions. Effective people rely on others as the best measure of their ongoing success.

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THE BEHAVIORAL COACHING SKILLS

Finally, as a coach there are several specific skills that will serve your role of being a catalyst to speeding up the process of helping leaders improve in their behavior. Most of the seven skills described below will be used numerous times throughout the flow of coaching a leader.

1. Behavioral Goal Setting

The ability to help leaders assess ***what*** to develop in their leadership behavior using 360º assessments, interviews, and/or observational skills.

Select the Right Behavior/Stakeholders	
FIT TO LEADER'S NEEDS	**CONNECT TO LEADER'S WIDER WORLD**
• Keep diagnosis balanced (pluses and minuses)	• Familiarize yourself with the leader's strategic context
• Support AND challenge leader's "self-diagnosis"	• Link goal to future challenges / opportunities
• Iteratively clarify the benefits of change	• Help select relevant stakeholders to recruit

Your first step as a coach is to facilitate the behavioral goal setting process to help the leader choose a goal and a set of stakeholders that she, or he, considers important and meaningful. Successful people are much more comfortable with the feedback and FeedForward they will receive if they feel it is coming from the right people on a behavior they want to improve. Remember the leader's need to be the one choosing what to improve and who will play the role of stakeholder.

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The second step as a coach is to ensure the leader's manager also agrees that the "right" behavior and the "right" stakeholders are involved. At the end of the assignment and after the leader has improved, you do not want the manager of the leader you are coaching to say: "*The leader picked the wrong behavior*;" or, "*What the leader worked on was not that important*." To the contrary, you want the leader and manager to feel the positive change in behavior was observed and recognized by the right people, and that the change was important.

2. Behavioral Rehearsal

The ability to prepare to interact/communicate with a stakeholder through demonstration, leader practice, review, and re-rehearsal of the interaction (if needed).

Practice Until "Good Enough"	
PREPARE	**SHOW AND PRACTICE**
• Organize the conversation the leader will follow	• Demonstrate/model the skill
• Check against Do's/Don'ts (Encouraging Development)	• Check for understanding (retention)
• Know the lines cold by practicing yourself	• Have Leader practice until "good enough"

In every profession, the very best performers practice what is important to do before executing. Time is invested up front to ensure the performance is flawless. You want the conversations that leaders have with stakeholders, around their own improvement, to come off effortlessly and gracefully.

Most people are far more comfortable talking about what they are going to say than actually rehearsing. When leaders say they are going to communicate something to a stakeholder, have them practice it with you playing the stakeholder (if you feel this is needed). Even what may

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appear to be a straightforward conversation can be fumbled through quite ineffectively.

If ineffective communication is going to occur, you want it to happen with you in private where it doesn't count. You want success to occur with Stakeholders where it does count. In very profession, the very best practice prior to execution. Time invested upfront ensures performance is flawless. You want the conversations your leaders have with colleagues around what the leader is working on to improve to comes off effortlessly and gracefully.

3. Action Planning

The ability to help leaders come up with a course of action to achieve their leadership goal by translating stakeholders' suggestions into clear, concrete observable actions.

Plan for Action	
INCREASE THE FOCUS	**ACCELERATE THE EXECUTION**
• Distinguish objectives/ends from the actions/means	• Help identify and tap hidden resources/assets
• Define success (Identify success measures)	• Push the schedule
• Help construct specific, actionable suggestions	• Keep emphasis on the desired effects

In today's working climate, leaders are excessively busy. Helping build an executable plan is all about what the Leader will "do" to achieve the goal. A good plan will bolster confidence that the Leader will pull off the desired improvement in behavior.

To change behavior requires doing something different or new. The old adage attributed to Einstein of: "*insanity being a state of doing the same things over and over again and expecting different results*," is the logic behind preparing for new actions. Keep the plan simple by only

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including actions that will have an impact on the leader's goal and the leader is willing to implement. Whatever is in the plan, make sure it gets started soon. Never let actions that can be taken this week slip into the next week.

4. Behavioral Reinforcement

The ability to help leaders by spotting improvement and providing appropriate levels of recognition for progress in a timely, specific, and genuine manner.

Provide Positive Support	
ACTIVELY SEEK DATA ON RESULTS	**ACT AS AN "ANGEL" ADVOCATE** (vs. a devil's)
• Look for approximations of success • Focus on the matches (not mismatches) to desired effects • Seek out positive news from stakeholders/others	• Regular doses of reinforcement work best • Always tie to some specific action taken/result achieved • Encourage others to provide positive feedback

Another byproduct of our busy lives is how readily we miss the positive things going on around us. You cannot slow things down enough so that everyone (the leader and his or her stakeholders) sees the good that is happening. What you can do is pay special attention and capture positive examples that the leader is improving on his or her behavioral goal.

Many years ago, Ken Blanchard, when he wrote The One Minute Manager, reminded us of the power of reinforcement for achieving improvement. If you could only remind individuals when they were off course or could only remind them when they were on course, positive reinforcement when "on course" leads more quickly to improvement. That is why Ken coined the phrase: "*catch people doing something almost right*."

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5. After-Action Assessments

The ability to help leaders debrief and gain insight into their actions through questioning skills, enforcing openness and candor, and keeping the conversation on track.

Learn After Doing	
BE THE ACTION PLAN CONSCIENCE	**KEY ON THE FUTURE**
• Ensure assessments take place in a timely fashion	• Keep the conversation future focused
• Make process easy and comfortable as possible	• Do not allow guilt, shame, or blame into discussion
• Provide reminders of key learning	• Use learning to re-plan the Action Plan

As the world becomes busier and more complex, we seem to rarely find the right time to learn. We tend to move on quickly after doing anything, tackling the next action item on our "to do" list. Such behavior robs us of the wealth of learning available from the actual events we experience.

After-Action Assessments take a structured approach to capturing, digesting, and capitalizing on our learning. This applies equally to successful experience as it does to failure. Analyzing and understanding at a deeper level what went right is necessary to ensure new behavior becomes a habit. Just as useful is analyzing and understanding, at a deeper level, what went wrong. This is necessary to learn and determine what to do differently next time. The main benefit of using After-Action Assessments is their power to speed up the learning curve.

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6. Story Telling

The ability to help leaders in their development by having a teachable point of view and the skill to convey this knowledge through clear and compelling narrative or anecdote.

Make a Point	
MAKE MESSAGE OF THE STORY CLEAR	**MAKE MESSAGE OF THE STORY COMPELLING**
• Have a specific “point to the story”	• Use a grabber
• Keep your stories simple and brief enough	• Hard data > Soft data
• Tell the story so the “moral” is unambiguous	• Pull emotional strings

Never miss an opportunity to find another story to add to your repertoire. The history of the human race is the transference of wisdom through story telling. Even after the invention of the printing press, stories maintain their appeal and special place.

Stories are found in our own experiences. We also can learn the stories told by others (creative borrowing of stories is well practiced in the fields of coaching and leadership development). Stories are easy to find by reading newspapers, periodicals, and books (sometimes one book can give you a dozen unique stories). Entertainment is another treasure trove of material.

As a coach, one of the most powerful roles you play is storyteller. It is here you can help a leader understand something he or she needs to know in a short, yet memorable way. And this is the key point. Your job is to keep certain ideas, or thoughts, conscious enough to influence the behavior of the leader you are coaching. Stories are the apparatus you use to implant the necessary wisdom.

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7. Modeling the 7-Step Process

The ability to personally use the 7 Step Involving Stakeholder Process yourself while avoiding the "Don'ts" in your own behavior.

Model the Process	
SET A GOOD EXAMPLE	**IMPROVE AS YOU MOVE**
• Use the 7 Steps yourself • If a "Don't" is pointed out to you, say "Thank You" • If a "Do" is pointed out to you, say "Thank You"	• Follow-up on your coaching • Be willing to change how you are coaching • End a better coach than you started

Setting an example, by practicing the 7-Step process yourself with the leader you are coaching, may be the most useful skill of all. This provides the Leader with a personal experience of what it is like to be a Stakeholder (to you) and be on the receiving end as you demonstrate the 7-Step process in your own coaching. An underlying message you convey is: "If this is good for you to do, it is also good for me to do as a coach."

As humans, we gather information through our senses. For the majority of leaders in Western culture the preferred sense for inputting information is the visual sense. What this means is *seeing something* is a more powerful medium for learning than hearing something. Showing is a more effective vehicle for learning than having a conversation. Yet, we often seem to rely on verbal exchanges to impart learning.

The more you use these skills, the more they will become second nature to you. Some probably already are. Others will have to be further developed while you are coaching. The goal for you as a Coach should be the same as the person you are coaching; namely, becoming a better coach this year than you were last year.

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As humans, we gather information through our senses. For the majority of leaders in Western culture the preferred sense for inputting information is the visual sense. What this means is *seeing something* is a more powerful medium for learning than hearing something. Showing is a more effective vehicle for learning than having a conversation. Yet, we often seem to rely on verbal exchanges to impart learning.

The more you use these skills, the more they will become second nature to you. Some probably already are. Others will have to be further developed while you are coaching. The goal for you as a Coach should be the same as the person you are coaching; namely, becoming a better coach this year than you were last year.

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COACHING FLOW

The Coaching Flow, and the way this Playbook is organized, can be broken down into three main phases:

PHASE 1: START SMART

- Contract for Coaching
- Select Behavior(s) to Develop
- Enroll Stakeholders

PHASE 2: IMPLEMENT THE ACTION PLAN

- Create the Action Plan
- Leader Follow-ups with Stakeholders
- Check in meetings with Leader

PHASE 3: SUSTAIN SUCCESS

- Reinforce the Coaching for Behavior Change Process
- Measure Progress (using Mini-Surveys)
- Plan the Transition

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What is laid out in *The Coach's Playbook* is devoted to the normal flow of a yearlong coaching assignment. Our belief is that the forming of new behavioral habits takes time. It is far too easy to change and then, over time, slip back into old practices. Even though our belief is that it takes a year of disciplined practice and follow-up, everything described in this guide can be applied to a six-month assignment.

FINAL THOUGHT

Everything we lay out for you is based on a practical, real-world perspective of the task to help a leader achieve positive, long-term change in behavior. Our approach considers you as a coach, the people you coach, and a world of complexity and time constraints. Applying the methods in this Playbook will not take up a lot of precious time for anyone involved. Our purpose is to help you gain leverage through the monthly application of a well-defined process made up of a few simple actions that provide a huge payoff.

Atul Gawande wrote a powerful and practical book aimed at improving the efficacy of surgeons doing the important work of saving peoples' lives and avoiding complications during recovery. His book titled The Checklist Manifesto drew from the discovery and disciplined use of checklist by airline pilots who also have a mission of doing their work in a way that preserves human life.

This *Coach's Playbook* will be organized around a set of checklists to assist you in the process of helping leaders apply the principles and 7 Step process with key stakeholders in their normal day-to-day activities at work.

There are blank pages in your *Coach's Playbook* for you to keep notes on how you will personalize the process to your own experience and style. Treat this document as a notebook for your own use. The material found inside is far from complete. It serves as a guide to the proverbial 20% that will provide 80% of value when coaching for behavioral change. What you add will provide additional value to you becoming an invaluable resource as a coach and in your own personal life.

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The better a leader practices the “DO” column, and avoids the “DO NOT” column, the more likely that leader will be to improve in whatever he or she chooses to work on. The key to helping a leader get even better is summarized on the next page.

Everything in the Coach’s Checklist supports the process of eliminating the actions on the “DO NOT” column and engraining the “DO” column as a habit.

What is laid out in this book is devoted to the normal flow of a yearlong coaching assignment. Our belief is that the forming of new behavioral habits takes time. It is far too easy to change and then, over time, slip back into old practices. Even though our belief is that it takes a year of disciplined practice and follow-up, everything described in this guide can be applied to a six-month assignment.

The benefits of Stakeholder Centered Coaching® go far beyond what the leader specifically chooses to develop. As you will learn: it deepens relationship between the leader and the stakeholders; it makes giving and receiving of feedback more natural and effective beyond what was worked on in the coaches engagement; it shortens the learning curve for the leader during the engagement for all future developmental opportunities if the leader continues to use the discipline; and, it builds the reputation of the leader on the important leadership qualities of courage, humility, and discipline.

The next page of this introduction is a short self-assessment on the use, or non-use, of this 7-Step Involving Stakeholder process. This assessment can be used as a guide to how well a leader is doing in applying the principles and methods described in this book.

The range of scores on this self-assessment is 9 to 45. The higher the score, the more a leader is acting consistent with the 7-Step Involving Stakeholder Process. Increasing one’s score on any question is a positive step toward practicing this methodology. A check on this self-assessment periodically helps to assess progress in making these leader skills a habit.

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HOW SUCCESSFUL PEOPLE GET BETTER

Self-Assessment

1. How many times in the past month have you asked anyone for feedback on something you did?

1	2	3	4	5
Zero	1 – 2 times	3 - 5 times	6 - 10 times	Over 10 times

2. How many times in the past month have you asked anyone for suggestions on how to improve something?

1	2	3	4	5
Zero	1 – 2 times	3 - 5 times	6 - 10 times	Over 10 times

3. How often would others say you listen well?

1	2	3	4	5
Never	Sometimes	Frequently	Most of the Time	All the Time

4. How frequently do you say “thank you” when others give you feedback or suggestions?

1	2	3	4	5
Never	Sometimes	Frequently	Most of the Time	All the Time

5. How often do you think about the costs and benefits of your actions/behavior before implementing?

1	2	3	4	5
Never	Sometimes	Frequently	Most of the Time	All the Time

6. How often would others say you are defensive when you respond to their feedback or suggestions?

1	2	3	4	5
Most of the Time	Frequently	Sometimes	Every so Often	Never

7. How many people would say they are actively involved in helping you improve and have been recognized for it?

1	2	3	4	5
No One	1 – 2 people	3 – 5 people	6 – 10 people	Over 10 people

8. How effective have you been in changing your behavior as a leader?

1	2	3	4	5
Ineffective	Somewhat Ineffective	Somewhat Effective	Effective	Highly Effective

9. To what extent would others describe you as following-up with them on your efforts to improve as a leader?

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Stakeholder Centered Coaching® Definitions

360º Feedback: A process whereby a leader's manager, direct reports, peers, and himself/herself provides feedback on the leader's behavior. This can be done electronically with a survey or conducted by the coach through a set of interviews.

360º Feedback Participant: A person who is selected to help provide feedback that will be used to assist the leader in choosing the developmental goal worked on during the coaching engagement. These participants may, or may not, be picked as stakeholders for the process. The choice of stakeholders will be based upon the leadership goal selected.

After-Action Assessment: A process where a leader reviews actions just taken in order to learn what to continue and what to change in order to be an effective leader. Formally, this is used after each Mini-Survey Report that measures the amount of improvements perceived by stakeholders.

Beliefs of Successful People: All of the Stakeholder Centered Coaching® principles and methods are based upon understanding how successful people think about themselves. This coaching process capitalizes on the positive beliefs these leaders have; and, manages the negative downside of these beliefs.

Feed Forward: suggestion for what a leader can choose to do in the *future*.

Follow-Up: The process by which a leader formally (and informally) checks in with stakeholders. This process involves the discipline of using a list of "Do's & Don'ts" for how to interact with stakeholders.

Leader/Person Being Coached: A person who has accepted a coach to help improve his/her leadership behavior

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Following Up with Stakeholders. Leaders learn what to avoid in using these skills and what to do to be effective.

Measurement of Results: Stakeholder Centered Coaching® pioneered the use of measurement at the end of a coaching assignment to determine whether a leader actually improves, as determined solely by stakeholders, not by the leader or the coach.

Mini Survey: A very short anonymous survey completed by stakeholders to determine the degree to which a leader has improved in his/her leadership goal. The normal mini-survey process is conducted at the halfway mark and at the conclusion of a yearlong coaching assignment. This provides the measurement of results.

Stakeholder: Individuals chosen to assist a leader to improve on the leadership goal by providing: 1) ongoing feedback; 2) ongoing feedforward; and, 3) participating in the mini-survey process to measure results. A good stakeholder is both *interdependent* with the Leader and *interacts with* the leader (enough contact to be able to provide concrete input).

Stakeholder Centered Coaching® (SCC): A disciplined process where a leader chooses a leadership goal and relevant stakeholders, who are recruited and used to help the lachieve a positive long-term change in leadership behavior.

Stakeholder Centered Coaching® 3 Principles: The philosophies developed over time by Marshall Goldsmith in working with top leaders form the basis of how a coaching assignment progresses toward the goal of achieving a positive, long-term change in behavior. These principles incorporate the belief set of successful people and serve as a foundation for the rigorous discipline used by the Leader.

Systems Approach: Stakeholder Centered Coaching® uses a more systemic process to help a leader achieve a positive long-term change in behavior than traditional coaching. This is accomplished by bringing the people who are affected by a leader's behavior into the process. It is the leader's manager, peers, and direct reports (along with the coach) who participate in and support the change

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PERSONAL NOTES

Stakeholder Centered Coaching®:

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STAKEHOLDER CENTERED COACHING®

Phase 1: Start Smart

(*The rest of the Playbook is organized into discrete sections that can be referred to when you are at a specific point in your coaching engagement.*)

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Phase 1: Start Smart

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START SMART CHECKLIST

CHECKLIST FOR STEP 1 – Contract for Coaching:

- ✓ Decide what materials you will use to set initial expectations with the leader
- ✓ Set up the time and location where you will discuss the "contract"
- ✓ Prepare yourself for the meeting by reviewing the contract and any other materials you will be using
- ✓ Conduct the meeting with the desired result that the leader and you agree on the roles & responsibilities for the coaching engagement
- ✓ Follow-up in a timely fashion on any agreed upon commitments and move to START SMART Step 2

CHECKLIST FOR STEP 2 – Select Behavior(s) to Develop:

- ✓ Decide what methods will be used to assist the leader gather input and diagnose his/her leadership
- ✓ Agree upon the roles/responsibilities during the data collection phase
- ✓ Prepare to discuss the results of the data collection with the leader
- ✓ Assist the leader in deciding what behavior(s) to choose to work on to improve using the Stakeholder Centered Coaching® methodology
- ✓ After the behavioral goal is selected, help the leader determine an appropriate set of stakeholders

CHECKLIST FOR STEP 3 – Enroll Stakeholders:

- ✓ Decide what methods will be used to enroll the stakeholders
- ✓ Agree upon the roles/responsibilities for enrolling the stakeholders
- ✓ Properly prepare the enrolling stakeholder conversation
- ✓ Enroll the stakeholders and ensure required follow-up takes place

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START SMART

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START SMART

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There is no one best contract to use. It is appropriate for you to design a contract that fits your style of coaching and the needs of the leader you are coaching. We do have templates you can use as is or customize as you see fit. Our suggestion is to keep it to one page if possible. See Sample 1 on the following page as an example.

To follow the Stakeholder Centered Coaching® methodology a few "expectations" are essential for the leader to understand and agree to follow. These include: picking a leadership goal and a set of stakeholders that the leader is willing to share with the chosen stakeholders; being willing to check in with stakeholders on a regular basis using the "Do's" and avoiding the "Don'ts" of the Stakeholder Centered Coaching® process; and, measuring the results through the mini-survey process at appropriate intervals.

A common set of handouts to use with a leader are the following three documents you can find in the Resource Section of the www.stakeholdercenteredcoaching.com website.

- A Coaching Contract
- Do's & Don'ts with Stakeholders
- Results of Following

The coaching contract is not an official, or legal, contract. It is simply a way to set clear expectations as to how you will coach the leader and get clarity on what the leader is expecting from you as the coach. Similar to a legal contract it spells out the expectations for both parties in the relationship. It is your decision whether, or not, to use such a document.

In preparing for this first conversation with your leader be clear on what are your desired effects from this meeting. What do you want the leader to know? What do you want to know about the leader that you don't know now? And what impressions do you want to leave with the leader?

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- ✓ Set up the time and location where you will discuss the "contract"

The meeting to go over the contract and agree upon "expectations of both parties" can be accomplished face-to-face, on a zoom meeting (or other digital meeting rooms) or over the phone. Either way, it can be helpful to send an electronic copy of the materials you use ahead of time for the leader to review and prepare for the conversation.

Especially at the senior level the client usually prefers this first meeting to take place face-to-face. Will you meet in the leader's office? Will you meet in a conference room in the building where the leader has his, or her, office? Will you meet in a neutral location offsite?

If this first meeting will not take place face-to-face, what technology will be used? The client will decide what platform to use and will likely use the one used inside the organization.

It is useful to have your own technology in case the leader does not want to use the organization's platform. Common platforms include: Zoom, GoToMeegting, Zoho, RingCentral, etc. Whatever video conferencing platform you use, you want to be proficient enough in using it so that you come across as knowing what you are doing. This will be your only opportunity to set a good first impression as to how you run meetings.

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✓ Prepare yourself for the meeting by reviewing the contract and any other materials you will be using

As this is one of the first meetings you will have with the leader, being fully prepared is key to coming across as credible and gaining the confidence of the leader. Regarding materials to use during this meeting, it is up to you to decide what you want to use and how you will conduct the meeting

Using the suggested documents as a guide, this will allow you to clearly explain what is expected of the leader and the benefit of following the process. How well you able to provide the appropriate rationale for the Stakeholder Centered Coaching® process through examples and stories is evidence you are ready for the upcoming meeting.

Begin the meeting with whatever personal sharing of information and "getting to know each other as people" seems appropriate. When you start to describe how you coach leaders, define the purpose as: To ensure we are clear on what to expect from each other during the year by reviewing and refining the "preliminary" contract which can be refined during this meeting.

During the review of the coach's contract, it is better to start with you and ensuring you understand what the leader expects from you as a coach (the top half of the contract). Ask if the leader had an opportunity to read through what you sent. Assuming they have, ask if there is anything they would like to discuss or change in what your responsibilities will be during the engagement.

When finished, walk the leader through the bottom have which basically describes what the leader will commit to do using the Stakeholder Centered Coaching® process. Go through each point in the coaching contract. Spend equal time on your expectations of them and his or her expectations of you.

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During the review of the coach's contract, it is better to start with you and ensuring you understand what the leader expects from you as a coach (the top half of the contract). Ask if the leader had an opportunity to read through what you sent. Assuming they have, ask if there is anything they would like to discuss or change in what your responsibilities will be during the engagement.

When finished, walk the leader through the bottom have which basically describes what the leader will commit to do using the Stakeholder Centered Coaching® process. Go through each point in the coaching contract. Spend equal time on your expectations of them and his or her expectations of you.

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SAMPLE: Coaching Contract

Coach's Responsibility

As Your Coach I will:

1. Help you prioritize and develop a realistic and effective plan to improve your leadership behavior/competency
2. Help you strategize whom to pick as Stakeholders
3. Set up meetings (phone or in person) for the upcoming month.
4. Return your voice- or e-mail within 24 hours (unless it is communicated that I will be unavailable in advance)
5. Provide guidance that fits your needs and aligns with the business
6. Provide appropriate encouragement, reinforcement, & support
7. Push you when you need it (play your behavioral conscience).
8. Help you gain resources associated with implementing your Action Plan
9. Act as a positive role model for receiving feedback (how I'm doing as your Coach)
10. Maintain proper levels of confidentiality

Leader's Responsibilities (Leader being coached)

To become a more effective leader I will:

1. Pick a single behavior I am committed to improve
2. Share my goal with all Stakeholders and ask them to evaluate me on this behavior from this date forward, not the past
3. Ask for feedback from all Stakeholders once a month during this contract
4. Ask each Stakeholder for FeedForward (suggestions) once a month and write down what is suggested without comment
5. Respond to all feedback and suggestions with "thank you"
6. Keep my Coach informed regarding feedback and suggestions received from Stakeholders in a timely fashion
7. Try new behaviors, even if uncomfortable
8. Practice/rehearse with your Coach key interactions associated with implementing your plan
9. Be willing to ask for help from all Stakeholders
10. Be willing to conduct a Mini-Survey every six months; and, complete an After-Action Assessment of the results

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I AGREE TO UPHOLD THESE GROUNDRULES TO THE BEST OF MY ABILITY.

COACH _______________ CLIENT __________________

If there are any changes to the "agreement/expectations" be sure to incorporate them into the contract and get it back to the leader immediately. In most cases leaders have been comfortable with the contract with no changes.

Some leaders, who will be receiving your coaching, see this as an informal document. In this case no one needs to sign the document. On the other hand, some leaders consider it as a formal document that should be signed by both parties. If that is the case, print two copies and sign both. Send both copies to the leader to sign both and return one to you.

As individuals are different, so also are organizations. Some organizations want this contract to be written in a more legal manner; and, do expect it to be signed. Follow whatever protocol is used by the client.

It is important to set expectations and gain commitment before you begin the coaching process. Much of what is in the coaching contract may well have been covered during the interview process (assuming there was an interview process where the person selected you over other prospective coaches).

This step has important symbolic meaning. It signals to the person being coached you consider the process to be a serious investment of his or her time and your time. Even if it is not signed, keep your contract and look it over periodically during the year to remind yourself of the role both you, and the leader are playing.

While you are going through the leader's responsibilities on the contract (the 3rd responsibility of asking for feedback from the Stakeholders once a month; and the 4th responsibility of asking for feedforward from the Stakeholders once a month) this would be a

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opportune time to go through the second handout on "Follow-up & Perceived Leadership Effectiveness."

Given the assumption that the person you are coaching would prefer the highest scores in improvement as a leader (i.e., a +3 rating), a simple visual scan of the graphs provides a compelling example for the power and importance of follow-up with stakeholders.

Here is the background on this research (the first large study we conducted). A large corporation sent 1000 managers through a two-and-a-half-day leadership training program that included 360° feedback given to each leader. As part of the training, leaders sat down with an external consultant to review their feedback and develop an Action Plan. One year later each manager again received 360° feedback on the initial survey; and those responding to the survey were also asked the following 3 questions:

- Did this manager respond and share his or her Leadership Goals?
- How often did this manager follow-up?
- Did this manager improve as a leader?

Review each option with the leader. The number to the right of each option shows the percentage of 1000 managers whose feedback fit this option. For instance, 19% (about 1 in 5 of the managers) did not respond to the 360° feedback and did not follow-up (Option 1).

Notice the results of Option 2 is slightly worse than Option 1. Sharing one's developmental goal and then failing to follow-up seems to raise some expectations that are then not met. Evidence from other studies clearly support that Option 2 raises expectations, which are then not met by the Leader. This leads to harsher evaluation the next time the leader is surveyed. Where the pattern starts to change, and positive change in behavior is perceived by others, is when a manager shares his, or her goal and there is follow-up during the year.

Highlight the obvious. The best future scenario is to adopt Option 6. Using consistent, monthly follow-up has a 55% chance of receiving the highest score of a +3; an 86% chance of achieving a +2 or above score; and a 95% chance of receiving at least a +1 score or better.

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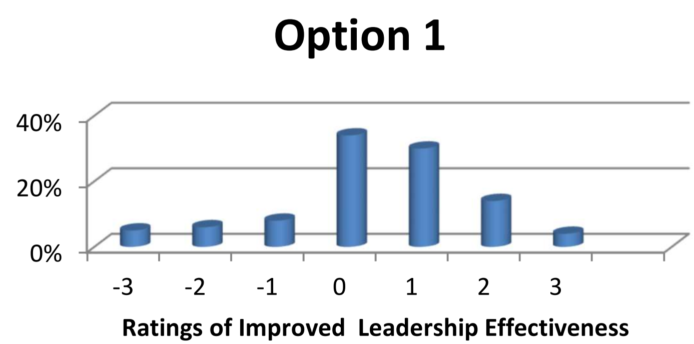
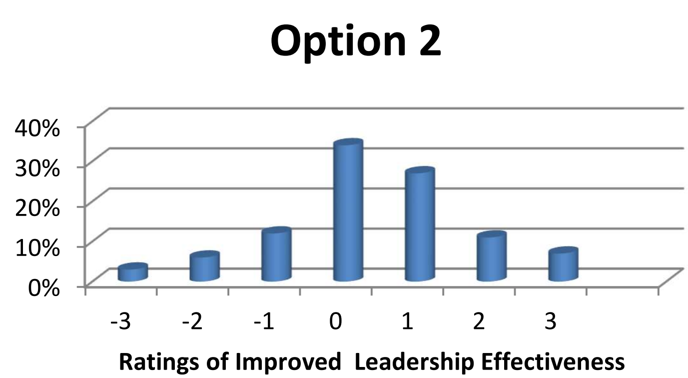
SAMPLE: **Follow-up & Perceived Leadership Effectiveness** (Approximately 8000 respondents evaluating 1000 managers). The question asked was: *Do you feel this individual has become more effective (or less effective) as a leader in the past year*? A seven-point scale was used, ranging from a low of –3 to a high of +3.

Option 1. My manager did not respond and did no follow-up (19% of sample; or about 190 managers)



Option 2. My manager responded but did no follow-up 6% of sample; or about 60 managers)



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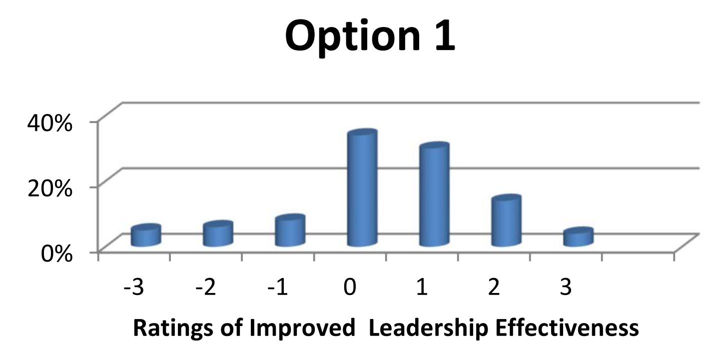

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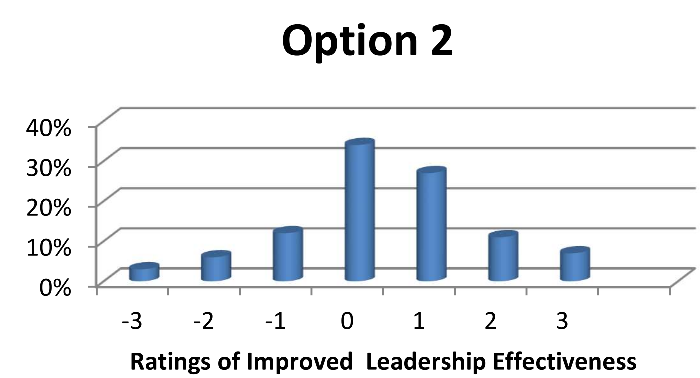

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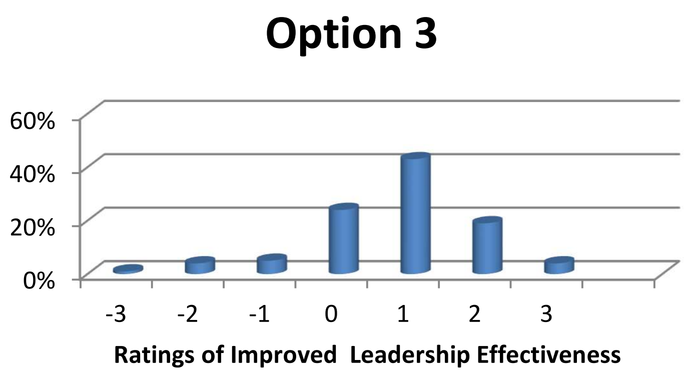
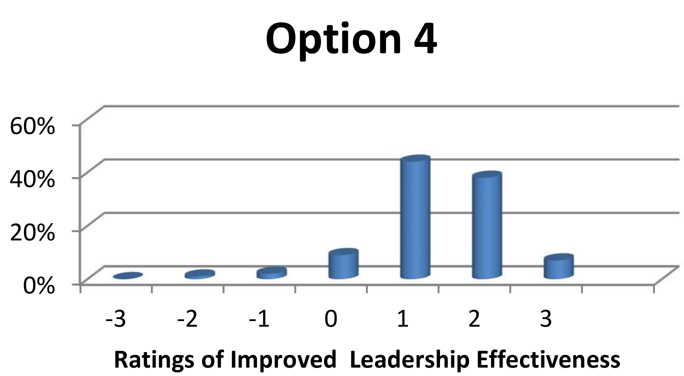
Option 3. My manager responded and did a little follow-up (17% of sample; or about 170 managers)



Option 4. My manager responded and did some follow-up (30% of sample; or about 300 managers)



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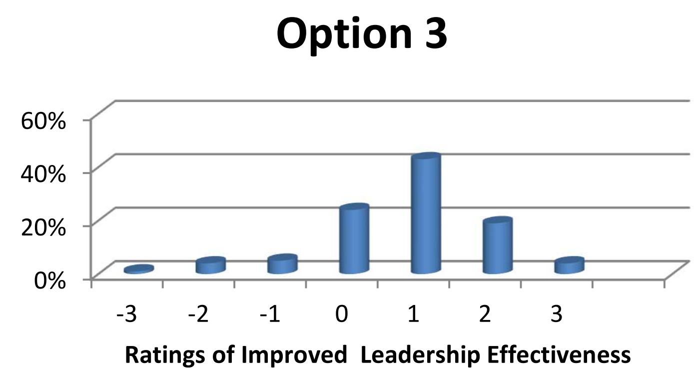

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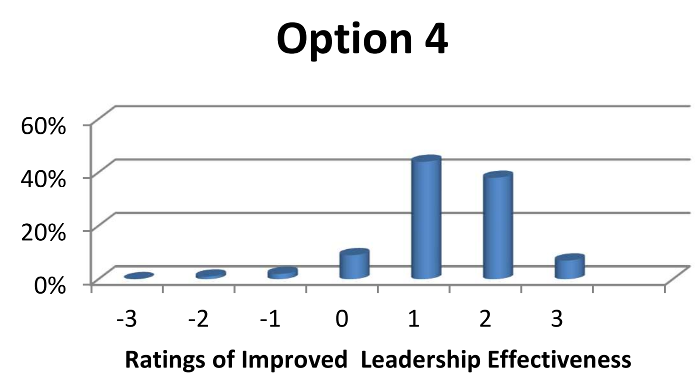

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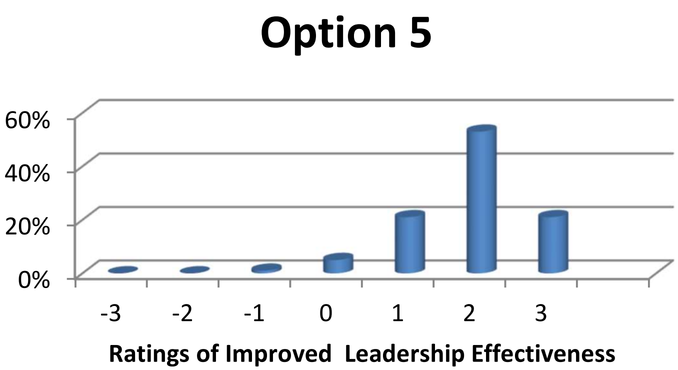
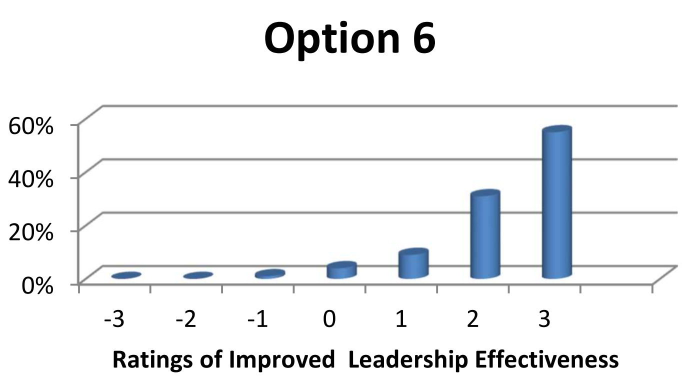
Option 5. My manager responded and did frequent follow-up (17% of sample; or about 170 managers)



Option 6. My manager responded and did consistent [periodic] follow-up (11% of sample; or about 110 managers)



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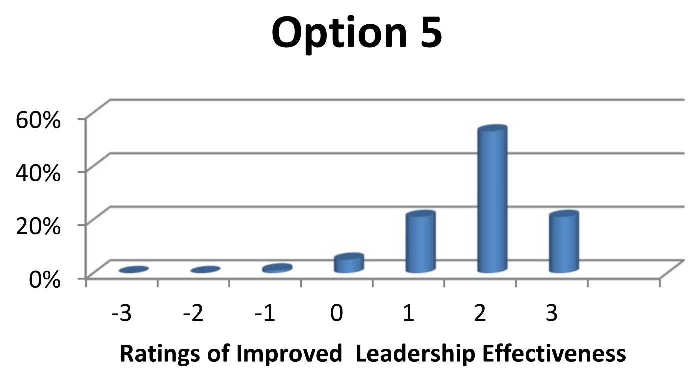

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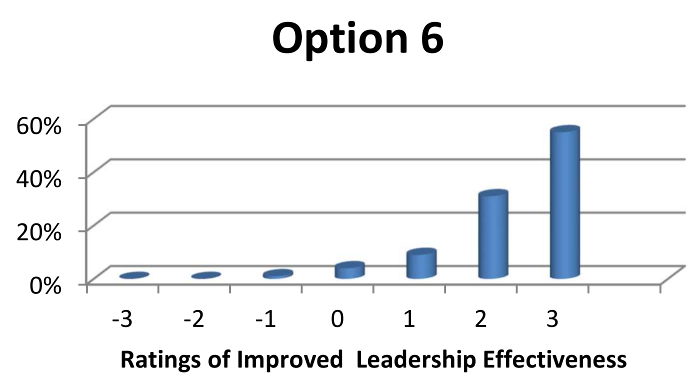

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This initial study has been replicated in 7 other large studies with almost identical results. The extent of leader follow-up and the perceived positive change in behavior by stakeholders are highly correlated. This enormous study was written up by Marshall Goldsmith & Howard Morgan in an article titled "*Leadership is a Contact Sport*." It can be found on Marshall's website devoted to his many writings and videos on the subject of leadership and coaching – www.marshallgoldsmith.com.

Reinforce the importance of follow-up as the most crucial step to ensuring success.

The third document we normally review during the first meeting with the Leader is the "Do's & Don'ts of Involving Stakeholders." If you have not covered the 7-Step Involving Stakeholders process while going through the contract discussion, going through the "Do's & Don'ts" is a very useful way use as the final framework to cover in this meeting.

By reviewing this document, the leader gains a clear understanding regarding what actions to take and what actions to avoid when working with their stakeholders. The research on how follow-up is the key to changing others' perceptions of a leader, the "Do's & Don'ts" provide the wisdom of how the leader behaves when following up with stakeholders.

In being recognized as the top leadership coach in the world for over a decade, Marshall Goldsmith's approach centered on helping leader become better by following up with stakeholders AND behaving consistent with the "Do" column, while avoiding the "Don't" column.

The Appendix to this Playbook offers more details on each of the seven steps of: Asking, Listening, Thanking, Thinking, Responding, and Following Up. You may find insights there that will help you prepare to describe these steps your leader will be expected to use with all their interactions with their stakeholders.

You will want to be able to answer any questions the leader has on this process. As part of this preparation, you would be well served to come up with your own examples, illustrations, anecdotes, and stories to illustrate different "Do's and Don'ts."

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SAMPLE: Do’s & Don’ts of Involving Stakeholders

DO NOT	DO
• Stick with your fan club • Expect instant help • Take up too much of their time	• Include as many as you can • Keep the process upbeat • Vary involvement as needed

STEPS FOR ENCOURAGING DEVELOPMENT

DO NOT	DO
Step 1. ASK	
• Wait for a “better time” to ask • Act skeptical or doubtful • Put yourself down	• Be concise • Be specific • Be positive
Step 2. LISTEN	
• Use “No,” “But,” or “However” • Make excuses • Exhibit impatience or anger	• Pay undivided attention • Capture what is said • Clarify/Confirm what you heard
Step 3. THANK	
• Use a dejected tone • Act artificial • Be insincere	• Say “Thank You” quickly • Use first name (if appropriate) • Be genuine
Step 4. THINK	
• Engage in “delusional” thinking • Prove the input is wrong • Validate “this is the way I am”	• Assess benefits of changing • Assess cost of changing • Decide if it is worth it
Step 5. RESPOND	
• Critique feedback/FeedForward • Respond to too many things • Over-commit	• Be brief • Be positive • Be future focused
Step 6. CHANGE	
• Procrastinate • Give into “feeling like a phony” • Expect instant success	• Apply suggestions in parallel • Maintain momentum • Make change visible
Step 7. FOLLOW-UP	
• Dwell on the past • Become complacent • Brag, gloat, or show off	• Politely push for specifics • Reinforce the process • Check your ego at the door

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- ✓ Conduct the meeting with the desired result that the leader understands and agrees on the roles & responsibilities for the coaching engagement

As this is such an important meeting, let's review how to conduct this meeting. The place to start with the leader is "the contract." This document lays out what is expected of the leader so that the leader knows what he or she is committing to in the coaching engagement.

And, being a proper contract, it spells out responsibilities for both parties. A suggestion is to start at the top with what are the expectations of you in your role as coach. Ask the leader to add, delete or change any of your responsibilities for being the coach. If they have more they want to add, or modify anything on the contract, be willing to adjust the contract.

After the leader is satisfied with your role, walk the leader through each of the responsibilities you expect from them if they desire to work to improve their leadership. When you get to items 3 and 4 where the leader is asked to check in with each stakeholder every month, this is a good time to turn their attention to research on how to change perception of stakeholders through follow-up.

After explaining the research, you can point out that this research was only the first study. You can ask the leader if she, or he, would like you to send them the article that was written and published titled: "Leadership is a Contact Sport" by Marshall Goldsmith and Howard Morgan.

When you get to item 5 on the leader's responsibility about responding to input from stakeholders with a "thank you," this is one possible place where to now use the third handout related to the "Do's & Don'ts" when involving stakeholders." (The other option is to wait to go through this framework as the final part of the meeting). Keep going through each item on the leader's responsibilities and answering any question that comes up. When you get to the final item related to the mini-survey and measuring results, if you haven't already talked about this, this is a good time to bring up the leadership qualities of: courage,

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humility & discipline. All three of these qualities will be exercised many times during their journey to improve their leadership.

Another document, which is completely optional, is to have a copy of "The Coachable Leader" self-assessment found on p. 21 of this Playbook. You could take this out at this time and have the leader read it. When finished you could then ask if she, or he is "ready for the challenge."

Not all leaders need to be challenged. Some grasp the benefits of the Stakeholder Centered Coaching® approach quickly and be eager to get started. Other leaders may need to have their pride challenged a bit with comments like: "This process is not for everyone…you may not have enough of that courage, humility or discipline to do what is asked of you…and that is O.K."

Finally, questions you might consider asking the leaders you are coaching during this initial meeting while you are setting expectations with the Contract are:

- How good of a leader do you want to be?
- What score are you shooting for from the Mini-Survey?
- How hard do you want me to push you in making the changes you will select?
- How frequently do you want to follow-up with each other?
- What do you want me to keep in confidence?

If there are changes to be made to the contract, conclude the meeting with your commitment to make the necessary changes to the contract by a specified date and when they can expect to receive the revised draft. Finally, communicate your positive expectations regarding working with the person over the upcoming year.

Follow-up in a timely fashion with any commitment you made during the meeting

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START SMART

STEP 2. Select Behavior(s) to Develop

CHECKLIST FOR STEP 2

- ✓ Decide what methods will be used to assist the leader gather input and diagnose his/her leadership
- ✓ Agree upon the roles/responsibilities during the data collection phase
- ✓ Prepare to discuss the results of the data collection with the leader
- ✓ Assist the leader in deciding what behavior(s) to choose to work on to improve using the Stakeholder Centered Coaching® methodology
- ✓ After the behavioral goal is selected, help the Leader determine an appropriate set of Stakeholders

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STEP 2. Select Behavior(s) to Develop

CHECKLIST FOR STEP 2

✓ Decide what methods will be used to assist the leader gather input and diagnose his/her leadership
✓ Agree upon the roles/responsibilities during the data collection phase
✓ Prepare to discuss the results of the data collection with the leader
✓ Assist the leader in deciding what behavior(s) to choose to work on to improve using the Stakeholder Centered Coaching® methodology
✓ After the behavioral goal is selected, help the Leader determine an appropriate set of Stakeholders

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- ✓ Decide what methods will be used to assist the leader gather input and diagnose his/her leadership

Most leaders benefit from some form of analysis of current data on their leadership to make an informed choice of what to focus on in their development with the assistance of a coach. On a few occasions a leader is ready to decide on the goal without the need for further analysis.

When data gathering is appropriate, the first step is to come up with the appropriate method. Typically, some form of 360º feedback is used. At the executive level this is achieved using behavioral interviewing by the Coach. At lower levels this is usually achieved using one of the many online, anonymous 360º surveys.

In helping a leader decide what to work on you have many tools at your disposal. There are many formal 360º tools available, behavioral interviewing techniques, and some idea starters that come from our own work.

Three one-page "idea starters" you might share with the leader you are coaching (all are available in our Resource Section on our website) are:

- Marshall's 20 Unrecognizable Habits
- Sally & Marshall's Behaviors that Keep Women Stuck
- Chris Coffey's Most Worked on Behaviors

Marshall Goldsmith's first best-selling book titled: What Got You Here; Won't Get You There included a list of 20 habits that hold people back from advancing in their career. This list offers a useful list of possible habits a leader might choose to eliminate from his, or her, behavior. You might consider sharing this list with your leader and asking if one, or more items on this list provides any insights into what they might choose to work on to improve.

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Marshall Goldsmith's 20 Unrecognizable Habits

1. **Winning too much**: the need to win at all costs and in all situations – when it matters, when it doesn't, and when it's totally beside the point
2. **Adding too much value:** The overwhelming desire to add our two cents to every discussion
3. **Passing judgment:** The need to rate others and impose our standards on them
4. **Making destructive comments**: the needless sarcasms and cutting remarks that we think make us sound sharp and witty
5. **Starting with "No," "But," or "However":** The overuse of these negative qualifiers which secretly say to everyone, "I'm right, You're wrong"
6. **Telling the world how smart you are:** The need to show people we're smarter than they think we are
7. **Speaking when angry:** Using emotional volatility as a management tool
8. **Negativity, or "Let me explain why that won't work":** The need to share our negative thoughts even when we were not asked
9. **Withholding information**: The refusal to share information with others to maintain an advantage over them
10. **Failing to give proper recognition:** The inability to praise and reward
11. **Claiming credit that we do not deserve:** The most annoying way to overestimate our contributions to any success
12. **Making excuses:** The need to reposition our annoying behavior as a permanent fixture so people excuse us for it
13. **Clinging to the past:** The need to deflect blame away from ourselves and onto events and people from our past; a subset to blaming everyone else
14. **Playing favorites:** Failing to see that we are treating someone unfairly
15. **Refusing to express regret:** The inability to take responsibility for our actions, admit we're wrong, or recognize how our actions affect others

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16. **Not listening:** The most passive-aggressive form of disrespect for colleagues
17. **Failing to express gratitude:** The most basic form of bad manners
18. **Punishing the messenger:** The misguided need to attack the innocent who are usually only trying to help
19. **Passing the buck:** The need to blame everyone but ourselves
20. **An excessive need to be "me":** Exalting our faults as virtues simply because they're who we are

Another helpful "idea starter" you can use to help Leaders think through what is valuable for them to choose to work on using Stakeholder Centered Coaching®, especially women leaders come from Sally Helgeson & Marshall Goldsmith's book How Women Rise.

And, both lists, the 20 Unrecognizable Habits or the 12 Behaviors that Keep Women Stuck may be relevant for both sexes. The following are the interpersonal habits and behaviors most likely to create challenges and roadblocks for women (and some men).

Sally Helgesen & Marshall Goldsmith's 12 Behaviors that Keep Women Stuck

1. **Reluctance to claim your achievements:** routinely over-assigning credit for your successes to your team, your partners or your boss because you fear being perceived as a showboat or a self-promoting jerk
2. **Expecting others to spontaneously notice and reward your contributions:** declining to take responsibility for getting noticed by failing to communicate what you are doing or the value of what you contribute
3. **Overvaluing expertise:** focusing too much attention on mastering the skills your job requires rather than also building the connections and visibility that will help you move forward

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4. **Building rather than leveraging relationships**: devoting effort to building a broad network of connections but then declining to use that network strategically so that you as well as others benefit
5. **Failing to enlist allies from day one:** avoiding asking for help until you've done your all your homework and thoroughly know the parameters of your job rather than starting with the question "who do I need to make this job a success?"
6. **Putting your job before your career:** allowing your desire to demonstrate loyalty and commitment to your boss or your team to prevent you from pursuing opportunities that will position you for the future
7. **The perfection trap:** believing that anything short of a flawless performance constitutes failure, which can make you reluctant to take measured risks while also creating unreasonable stress for you and for people around you
8. **The disease to please:** being so fearful of disappointing others than you fail to hold them accountable, assert your own boundaries and say no when it serves your best interests
9. **Minimizing:** routinely using words and body language that diminish your presence and your capacity to be present, thus undermining your ability to hold your space
10. **Too much:** offering too much information, too much disclosure, too many words or too much background rather than being crisp and concise in your communications
11. **Ruminating:** expending too much energy thinking too much about the past, dissecting your mistakes, blaming yourself, and turning regret inward rather than moving on
12. **Letting your radar distract you:** being so highly attuned to the environment and to other peoples' responses that you that fail to filter out unhelpful distractions, which scatters your attention and undermines your ability to be present

A final helpful "idea starter" you can use to help Leaders think through what is valuable for them to choose to work on using Stakeholder Centered Coaching® was developed by Chris Coffey after completing over a hundred coaching assignments. This List is a compilation of the most worked on leadership goals chosen by C-level executives, high potentials, and critically important individual contributors.

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Chris Coffey's List of Most Worked on Leadership Goals

1) Treat others with respect
2) Build trust
3) Listen to different points of view with an open mind before giving my opinion
4) Delegate more effectively
5) Stand up to individuals who undermine teamwork
6) Deal with performance problems in a timely manner
7) Develop Executive presence
8) Address conflict constructively and timely
9) Collaborate with others
10) Develop and link team strategy to business strategy
11) Stand up for what I believe in
12) Hold others accountable
13) Present self with confidence
14) Focus on the critical few issues
15) Become more assertive
16) Take appropriate risks
17) Build cross-functional relationships
18) Become a better coach and mentor
19) Match my leadership style to the specific need of others.
20) Present my POV persuasively
21) Become more decisive

360° APPROACHES

Tools like the three lists provided here are optional tools you can use at the beginning of a coaching assignment to help your clients in selecting what to improve in their leadership behavior. In some cases, no other means is needed for the leader to choose what to develop and change.

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In most cases, some form of diagnostic involving the input from others is used to provide feedback to assist in the decision-making process by the leader.

The method that Marshall Goldsmith, Frank Wagner, and Chris Coffey employ at the senior level is a behavioral interview 360° based on three questions. Although the wording might be a bit different in each of their approaches, the questions are some variations of:

1) What are this leader's three key strengths?

2) What are the three most important (or useful) areas for this leader to improve?

3) If you could pick one behavior that this leader would immediately start, stop, or modify, what would that be?

Once all the identified respondents are interviewed, the coach organizes the data into themes under heading based on the three questions asked. Individuals are not identified in this process, except the leader's manager. The feedback is simply sorted into themes under the three questions, usually listed by the most frequent response to the least frequent response.

Since the work Marshall Goldsmith did for his third best-selling book <u>Triggers</u>, he has added two more questions for conducting behavioral interviewing at the beginning of a coaching engagement. These are:

4. Describe the environment that brings out the best in this person?

5. Describe the environment that does not bring out the best in this person?

One of the major themes of the <u>Triggers</u> book is how much influence our environment has on our behavior. By asking these two questions, Marshall often gains insights that will help him guide the leader he is coaching to become the person the leader want to become.

Below the executive level, a much more common approach is using 360° surveys to gather data. Companies can have their own customized 360° survey based on their values and leadership framework that is an

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obvious choice to use. If the Company and leader are not predisposed to a particular survey, the coach is free to suggest any one of many tools available. As part of the diagnosis coaches are also free to use any personality assessments they find useful to help in the choice of the leadership goal.

In the Stakeholder Centered Coaching® Network, one survey first developed by Marshall Goldsmith in partnership with the consulting firm Accenture is The Global Leader Survey (GLS) Survey. We offer certification training in the use of this 360º survey as one useful means to help leaders chose the focus of their development. In many cases, the client organization has a prescribed 360º survey they use for leadership development. In those cases, it is wise to use their instrumentation for data gathering.

Additionally, surveyonline.com offers a number of short, useful 360º Surveys that can be used to provide helpful feedback to the leader and coach. You can receive a document that includes these surveys and more about this scoring service by contacting Karen Wagner at surveyonline@comcast.net.

Along with the decision of what method of data collection will be selected, a second important decision is choosing the people who will be used to gather input. Often the manager of the leader, along with Human Resources are guides as to who will participate in the 360º survey. Ideally the people providing input should be one's the leader respects and is willing to accept as valid what is collected and reported.

Another consideration in this step is to agree upon the timing of data gathering. Over what period will the data gathering take place; and, when will the reports generated be available?

Finally, the last part of this step is to decide who will receive the reports? Will the leader and the coach be the only one's receiving copies? Will Human Resources, or the leader's manager receive a copy? Based upon the answer to these questions, respondents should be made aware of who will be seeing the results of the 360º process. Maintaining the right level of confidentiality is vital to the integrity of this process.

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Also, it is important to be clear that the people who will be used for providing feedback are not considered stakeholders at this point of the process. At this phase of the coaching engagement, they are simply the 360º "respondents."

Stakeholders will be selected after the behavioral goal is selected by the leader and approved by higher management. This is not to say that many, if not all, the respondents who provide feedback could end up being stakeholders once the goal selected. The decision on whom becomes a stakeholder is based those relevant to the developmental goal the leader is going to work on to improve.

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- ✓ Agree upon the roles/responsibilities during the data collection phase

Even if an outside vendor is identified as the provider of the 360° feedback, you as the coach should consider this process as your responsibility to ensure the data gathering is done according to the timelines agreed upon and the right people receive copies of the results. Stay on top of things and properly involved.

If you are the one providing the service of data gathering be sure you are living up to the expectation's others have during the data gathering and report generating. What you want to avoid is delays and the process taking up too much time. You want to ensure the timely delivery of high-quality input, so the Leader chooses a relevant goal she/he wants to improve.

One issue to ensure you manage upfront is confidentiality. In this case what this means is to be sure expectations are clear to everyone involved, who will see the 360° results. When the coaching is considered developmental, our normal approach is that the only ones who will see the results are the leader and the leader's coach.

Some organizations want the leader's manager and/or Human Resources to have a copy. If this is the case, ensure that this is communicated to everyone before the 360° is administered. That means, the 360° participants should know who will be getting a copy of the report, along with the leader. This step has been handled professionally when no one is surprised later regarding the use of the report.

As you know in our Stakeholder Centered Coaching® process the goal the leader chooses, based partially on the 360° Report will be made public.

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- ✓ Prepare to discuss the results of the data collection with the leader

It is advisable to receive a copy of the report before it is sent to the leader or any other person who was identified to receive a copy. You want to thoroughly analyze what is in the report and be prepared ahead of time for any reactions the leader, or others will have based upon what is in the report. Obviously, this advice is not relevant when you are the data gatherer the creator of the report using an interview 360º process.

If you have used the data gathering methods in the past, and are familiar with the report, this will not take up a lot of time. If you are using a method that is new to you, such as the Company's own customized 360º, or a vendor you are not familiar with, become conversant in the layout of the report and how the data is displayed before meeting with your Leader.

Many 360º instruments are rather easy to interpret and the learning from the data is relatively obvious. There are also many reports that are rather complex and filled with a lot of data, much of which is not easy to interpret.

Do not assume the leader you are coaching will be conversant with the report and find it easy to interpret. Even if the leader has received feedback in the past with this report, he or she may not have skillfully gleaned the relevant learning from the experience. The easiest type of report for leaders are the ones where "behavioral interviewing" by the coach is the method used to collect and create the report.

If the process selected to help the leader gain a deeper perspective on their own leadership involves a lot of data, be willing to spend the time to make the analysis as user friendly as possible. This may mean writing up your own summary of results. Your own summary may be for your own use for preparing for the upcoming discussion. More likely, it may be highly appropriate to share your summary with the leader.

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- ✓ Assist the leader in deciding what behavior(s) to choose to work on to improve using the Stakeholder Centered Coaching methodology

Here is where you will be using one of the 7 coaching skills mentioned in the introduction to Playbook, namely "1. Behavioral Goal Setting." This is the ability to help leaders assess *what* to develop in their leadership behavior using 360º assessments, interviews, and/or observational skills.

Select the Right Behavior/Stakeholders	
FIT TO LEADER'S NEEDS	**CONNECT TO LEADER'S WIDER WORLD**
• Keep diagnosis balanced (pluses and minuses)	• Familiarize yourself with the leader's strategic context
• Support AND challenge leader's "self-diagnosis"	• Link goal to future challenges/opportunities
• Iteratively clarify the benefits of change	• Help select relevant stakeholders to recruit

In this step you as the coach are there to facilitate the behavioral goal setting process to help leaders choose a goal and a set of Stakeholders that they consider important and useful. Successful people are much more comfortable with the feedback and feedforward process that will follow if they feel the input provided is coming from the right people on the right behavior. Remembering the belief set of successful people, the leader's need to be the one choosing what to improve and who will play the role of stakeholder.

Some coaches prefer to bring the 360º assessment to the meeting and go through it with the Leader as the Leader is viewing the data for the first time. Other coaches prefer to send the report to the leader before meeting so the Leader can have already begun to analyze the information. Our normal approach is to send the report to the leader before meeting; and, send it fairly close to the scheduled meeting.

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• Iteratively clarify the benefits of change | • Help select relevant stakeholders to recruit

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Some coaches prefer to bring the 360º assessment to the meeting and go through it with the Leader as the Leader is viewing the data for the first time. Other coaches prefer to send the report to the leader before meeting so the Leader can have already begun to analyze the information. Our normal approach is to send the report to the leader before meeting; and, send it fairly close to the scheduled meeting.

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If sending the 360° report out in advance, ask the leader to spend some time reviewing the content and not share the results with anyone else before meeting with you.

Begin the meeting by defining the purpose as: To use the input from the 360° Report, and any other pertinent information, to begin the process of choosing a specific behavioral goal (leadership skill) to work on over the next year.

During the meeting, use the TIPS provided below to ensure the person you are coaching: 1) clearly understands what is in his or her 360° Report; and, 2) sees all the value present in this feedback.

Ask if he or she is ready to start the process of selecting the leadership behavior they will work on during the year. If the response is "not ready," point out that some time for reflection is perfectly normal. It often takes a little soak time in order to clearly gain the insight needed to pick a specific behavior to improve. Advise the person that the area to work on is probably what they keep thinking about from his or her 360° feedback on a recurring basis. Arrange for the next meeting (after a little more soak time) to discuss what the behavioral goal will be for the upcoming year.

If the person is ready to talk about what they want to work on to improve, support his or her efforts to refine and sharpen his or her focus. Most individuals start by defining very broad goals for themselves. A good behavioral goal will be specific, observable, and measurable. Some developmental goals (leadership skills) may be made up of two, or three, interrelated behaviors that together make up the goal.

If it seems appropriate, have the person write up the developmental goal in his or her own words and send it to you. Provide any edits you feel would make the goal more precise, observable, and measurable. Review your suggestions and let them make the ultimate decision on the wording.

Finally, discuss who would be the appropriate people (stakeholders) to serve as sources of feedback and suggestions during the year. Inform them that both the behavior(s) chosen, and the list of stakeholders will

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be reviewed with his or her manager to gain a “sign-off” that he or she is working the right plan.

TIPS:

(Using the 360^o Feedback Report as a Guide for Goal Setting – assuming this is part of the process).

Setting Expectations for Meeting to Review of 360^o Report

1. Review your expectations with the person you are coaching before discussing the contents of the report. Specifically remind the leader that:
    - Reviewing this feedback is an important step in the development process.
    - The 360^o Report is a key tool to help focus the search for what developmental goals will be most productive to work on in the upcoming year. It is important to note that it is not the only source of information.
    - What a person does after receiving feedback is more important than what has happened leading up to this feedback report.
2. Ask the person if they need any clarification of what is in the Report. Clarify any questions raised.

Helping the Person to Use the Report Effectively

1. Explain that the sequence of most 360^o reports move from general, to specific, feedback. Assuming the person has already reviewed the Report, you may want to start with the following questions in relation to the total Report. At each major section of the 360^o Report ask the following questions:
    - Do you understand the feedback?
    - What patterns/messages emerge?
    - Is the feedback valid and accurate?
    - What have you learned?
2. Point out that the people who filled out the surveys scored this person higher in some behaviors and lower in other behaviors.

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The comparisons between scores, not the numbers themselves, are the most valid aspects of the report.

3. Written comments are generated by the people who responded to the questions and are not computer generated.

4. These written comments are often the most useful, and toughest, feedback in the report. It is unfortunate if there are only a few, or no, written comments. The number and length of written comments provide a key piece of data in the Report. Many written comments mean the channels of communication are open, people care enough to take the time, and the reviewers feel the person will handle the feedback constructively. One caution to keep in mind is that limited written comments can be due to time pressures at the time respondents were completing their surveys and do not signal the channels of communication are closed.

5. If the person you are coaching is having difficulty with his or her results advise him, or her, that interpreting feedback, and digesting the detail, is not an easy process and may take some time.

Coaching During 360º Feedback Review

Human nature seems drawn to the bad news. Our focus gravitates to the low scores, giving them a disproportionate amount of attention. It is very beneficial to have the person force his or her attention on the positive news within his or her report. Requiring equal airtime for exploring the higher scoring areas provides a balanced view of the data.

Sometimes you have to physically put your hand over the low scores and divert attention and focus to what the critics said “good” about the person. Even low scoring items often have a person, or two, who rated the person relatively high. Point these things out to the leader.

Appeal to higher instincts. Very quickly in the process you want to remind the receiver of good, bad, or indifferent feedback that what he or she does with the feedback is more important than all the actions leading up to the results in the report. Especially if the results are negative, responding in a positive manner is a sign for everyone to take

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notice. Why? It requires courage, honesty, and humility to admit past mistakes. It signals a visible commitment to change. As Woody Hayes, the legendary football coach from The Ohio State, was fond of saying: *"If it comes easy, it's not worth a damn."* One of the best things you can do is use yourself as an example. What can you say about your own experience in getting tough feedback, developing a plan, and implementing that plan successfully?

Help deal with confusion caused by the distribution of responses. It can be very insightful to pick out a number of distributions in the leader's own 360º Report. For instance:

- What does it mean if you had one response in each of the choices along the scale [i.e., One person gave a 1, One a 2, One a 3, One a 4, and One person gave a 5 on a five-point scale]? We call this the Las Vegas slot machine profile. One interpretation is: You are very inconsistent and treat everyone differently. Another interpretation is: You are excessively consistent, treating everyone the same, and you have five people with very different needs from the leader on that behavior. For instance, you could listen to everyone 30 minutes a week. To one person this is a perfect "5", as you move down to the person who selected a "1," they obviously need a lot more than 30 minutes.
- A second example of a very common distribution is where all the responses are in the positive 4-5 range with one response in the negative 1-2 range. There are a few key points to make regarding this distribution. First, when so much feedback is positive it clearly indicates skill in the behavior. The one person who is rating low could be doing it because: a) you do not exhibit that skill in the same manner with them as you do with everyone else; b) they have a very different expectation of you in this behavior; or, c) they are unfairly evaluating you and there is something else behind their response. Here is a place you can use the Spinoza line: "When Peter is talking about Paul, we often learn more about Peter than Paul." In other words, the Report doesn't just provide information about you; it also can be saying something about the individuals who responded to the leadership survey.

Coach the person on what "not to" do. Most people tend to focus on their poor results in their developmental planning. Especially if the

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person gets low scores overall there is a possibility, he or she, may wind up acting in inappropriate ways. Do not assume the leader you are coaching knows what to do when they go back to work. What are the key actions you want to advise them not to take? Advise them when they go back to the office:

- Do not ask those who gave feedback to break their anonymity
- Do not ask them about the opinions of other people
- Do not joke about the process
- Do not complain, or make excuses, about the feedback
- Do not supply 360^{o} numbers/comparisons - Assuming you are working on a behavior that was one of your lowest scoring items in a 360^{o}. Do not say things like: "*This was my lowest scoring behavior*" or "*I scored in the lowest 10 percentile in listening*." This can be embarrassing to you and to the person hearing this
- Do not seek revenge (unless you want people to lower their scores even more)

Your task is to coach the person on avoiding unprofessional ways to react to his or her feedback. Even when the recipient of feedback is well intended and motivated to improve, others in the workplace may not think they are. Professionally handling feedback includes avoiding certain behaviors and replacing them with appropriate behaviors.

Take extra time with those who receive poor feedback. In your coaching assignment, those who receive good feedback probably need less time than those who receive very critical feedback during this phase of the process. Everyone wants to feel special. With a sizable amount of negative data, a person can feel misunderstood, undervalued, derailed from his or her normal productive outlook, and completely without any outside support. Emotionally, they may feel drained. It takes a lot of energy to swallow negative feedback. The antidote? Make them feel special. Commit more time to them. Open your calendar and slot them in for extra time and attention. Nothing communicates a person is important more than the genuine commitment of your time.

Once a person has zeroed in on a behavior, lead him or her through the "When I get better at…" exercise. Keep pushing for concrete benefits

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to achieving success on the behavioral goal. Make a copy of the responses so as to have a record of the benefits. Send them the summary and keep a copy for yourself. Use this list of benefits as reinforcement during the year. Treat this page as an "evergreen" document, one in which more benefits can be added to at any point in time.

Finally, questions you might consider asking the leaders you are coaching during the behavioral goal setting phase of the process are:

- *Is it better for you to stop some behavior or start something new? Should you do less of or more of something?*
- *What are the personal benefits to you by improving…?*
- *What are the benefits for others and the organization?*
- *What are the costs to you if you don't succeed?*
- *What are the costs to you if you succeed?*
- *What is holding you back from selecting this goal?*
- *On a 1 – 10 scale how committed are you to this goal? What would it take to raise that number to…?*
- *Who is interdependent with you, close enough to observe you, and who would make good "stakeholders?"*

Having the leader take the time to thoroughly think through and complete a cost/benefit analysis is very useful for later when you can remind him or her of why he or she is working on the behavior chosen.

If the Leader is Struggling in Making a Decision

An optional activity you can use with a leader at the beginning of your coaching engagement is an exercise in clarifying the leader's values. This can help a leader who is having difficulty coming to grips with what to invest the needed time to improve. Master Coach Mike McCartney provided this as an example of what he uses for this type of activity.

In Jim Kouzes and Barry Posner's book The Truth About Leadership, they write about the 10 enduring truths that are timeless and don't change even when the context of leadership does. The third truth is: Values Drive Commitment. A leader needs a good deal of commitment

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A piece of advice from this excellent book is: Maybe more than what you've achieved, people want to know what you stand for. To follow you, people need to believe in you. To believe in you they need to know you. So, you have to get clear on what guides you. Values drive commitment. You must find your voice. Here is an exercise you can use:

OBJECTIVE: Identify and clarify personal values and how they support development work and organization values

Read though the list of values below. Circle your top 10…

CORE VALUES MASTER LIST

1. Achievement	11. Teamwork	21. Integrity
2. Competence	12. Balance	22. Enthusiasm
3. Effectiveness	13. Courage	23. Dependability
4. Fun	14. Creativity	24. Knowledge
5. Innovation	15. Excellence	25. Loyalty
6. Gratitude	16. Respectfulness	26. Perseverance
7. Peace	17. Fairness	27. Responsibility
8. Success	18. Faith	28. Joy
9. Quality	19. Cooperation	29. Service
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After Selecting 10, Cross out 6 of them. (This doesn't mean these 6 don't matter, just that the other 4 are *more* <u>*Core*</u>. Think of it like this: what 4 values represent what you stand for <u>above all else</u>? What do you strive to make visible in your actions?

Take these top 4 and jot down phrases that *describe behaviorally* what they mean (to you).

EXAMPLE: **ACHIEVMENT:**

1.____

2.____

3.____

4.____

Have your leader spend the needed time to do this exercise. Once finished you can debrief it with questions like:

- *What would your organization look like if you strengthened these values in yourself?*
- *How do these values align with the organization's values?*
- *Are you (and how are you) held accountable for these?*
- *How does this exercise help you think through what you should work on to improve as a leader?*

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✓ After the behavioral goal is selected, help the Leader determine an appropriate set of Stakeholders

Once the leadership goal is selected, the next thing to do is discuss who is in a good position to notice if/when the leader's behavior changes? These are people who can help and would serve as stakeholders (those who will be enlisted to provide ongoing feedback and feedforward suggestions on a monthly basis, as well as completing the mini-follow-up surveys at half-way point and end of the coaching assignment). If the behavior is highly relevant with direct reports and the leader is not intending to use some as stakeholders, question why any were left off the list.

Similarly, if the behavior is highly relevant with peers, question the selections made if any peer has been excluded. To become a stakeholder, remember the characteristics that make for a good stakeholder: 1) they are close enough to the leader to be able to provide useful feedback and insights (*INTERACT* with enough frequency); 2) they are affected by the chosen behavior and will benefit from a positive change by the leader (*INTERDEPENDENT* with the Leader).

The last step as a coach in the behavioral goal setting process is to ensure the leader's manager also agrees that the "right" behavior and the "right" stakeholders are involved. At the end of the assignment and the leader has improved, you do not want the manager saying: "*the leader picked the wrong behavior*;" "*what the leader worked on was not that important*;" or, "*the wrong stakeholders were involved*." To the contrary, you want both the leader and the manager to feel the positive change in behavior was observed and recognized by the right people, and that the change was important enough to make the investment.

Here may be the first opportunity to use another of the coaching skills we outlined in the introduction to this book. The coaching skill here is behavioral rehearsal. The meeting with the leader's manager to review the leadership behavior chosen to work on and which stakeholders will be recruited to provide ongoing support is important enough to take the time to prepare properly.

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Behavioral rehearsal is the ability to demonstrate how to interact and communicate with a stakeholder through demonstration, leader practice, review and re-rehearsal of the interaction (if needed).

Practice Until "Good Enough"	
PREPARE	**SHOW AND PRACTICE**
• Arrange the conversation the leader will follow	• Demonstrate/model the skill
• Check against Do's / Don'ts (Encouraging Development)	• Check for understanding (retention)
• Know the lines cold by practicing yourself	• Have Leader practice until "good enough"

By properly preparing the leader for the conversation with his, or her, manager you are eliminating the possibility of an ineffective meeting. You want this meeting to go very well and the leader to gain the support of higher management for what is being chosen to work on over the coming months.

In conducting a behavioral rehearsal, some leaders would prefer to try it out first. They like to learn by trying things out. Other leaders would prefer to see an example first. In other words, they'd like you to demonstrate. Therefore, a good question to ask the leader, before conducting a behavioral rehearsal is:

"*Would you like to try it out first, or would you like me to demonstrate how I would say it*?"

The overarching goal is to have the leader working on a behavior that is personally relevant and ties into what would also be considered valuable by the boss. In this meeting the leader wants to convey clearly and with well-articulated reasoning why the behavior chosen is the right one to select. The leader also needs to effectively listen to his or her manager and include the manager in the decision.

Sometimes the manager has a better perspective than the leader on what would be best to work on and can refine the way the behavioral goal is

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In conducting a behavioral rehearsal, some leaders would prefer to try it out first. They like to learn by trying things out. Other leaders would prefer to see an example first. In other words, they'd like you to demonstrate. Therefore, a good question to ask the leader, before conducting a behavioral rehearsal is:

"*Would you like to try it out first, or would you like me to demonstrate how I would say it*?"

The overarching goal is to have the leader working on a behavior that is personally relevant and ties into what would also be considered valuable by the boss. In this meeting the leader wants to convey clearly and with well-articulated reasoning why the behavior chosen is the right one to select. The leader also needs to effectively listen to his or her manager and include the manager in the decision.

Sometimes the manager has a better perspective than the leader on what would be best to work on and can refine the way the behavioral goal is

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stated. Most often the manager agrees with the leader. You want to prepare the leader for when the manager has a different point of view. The bottom line for you is to do what is necessary to prepare the leader you are coaching to have this short meeting with his, or her, manager to gain agreement.

NOTE: Choosing the Stakeholders

What makes a good stakeholder? What is most common is to use a guide in selecting the individuals who will become the "internal coaches" for the leader are:

Who is INTERDEPENDENT WITH THE LEADER relative to the developmental goal? In other words, who is impacted by the leader's behavior because of their working relationship.

Who INTERACTS WITH THE LEADER with enough frequency to give useful and timely feedback and feedforward to the leader during the implementation of the Action Plan? Those who spend enough time in a position to observe the leader make excellent Stakeholders.

And, as an underlying reason for choosing a person to be a stakeholder is: "*With whom does this leader benefit from if he, or she, builds a stronger relationship*?

Finally, the question often comes up as to how many stakeholders to involve? Without giving a definitive answer, it is advisable not to choose too few or too many. The most common range is 8 – 12 stakeholders. The actual number chosen may vary from this norm based upon the criteria listed above, along with the amount of time the leader has to effectively check in with the chosen stakeholders, and the number of important individuals who should be included in the process.

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START SMART

STEP 3. Enroll Stakeholders

CHECKLIST FOR STEP 3

- ✓ Decide what methods will be used to enroll the stakeholders
- ✓ Agree upon the roles/responsibilities for enrolling the stakeholders
- ✓ Properly prepare the leader for the enrolling stakeholder conversation
- ✓ Enroll the stakeholders and ensure required follow-up takes place

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- ✓ Decide what methods will be used to enroll the stakeholders

There are a number of ways to recruit the stakeholders. In some cases, the leader will enroll the stakeholders and the coach will stay in the background. In other situations, the leader and the coach together will enroll the stakeholders, each playing a part. This would be done in either a teleconference, zoom meeting, or a face-to-face meeting. And, in some cases the coach would be the best person to enroll the stakeholders.

It is appropriate to consider the leader's own preferences in choosing who will enroll the stakeholders. Some leaders want to do the enrolling and see the benefit of taking personal responsibility. Other leaders feel uncomfortable and look to the coach for support in doing this important task.

And there are rare situations where what the leader has chosen to work on is reversing a very negative behavior that has caused a lot of pain and suffering for the stakeholders, which has resulted in a very negative work environment. This is the kind of situation where the coach is an appropriate person to do the enrolling. The coach, symbolizing a neutral and positive addition to the situation, may be able to get the process started in a way to ensure participation.

Each approach to enrolling has benefits and costs. When the leader enrolls her, or his, stakeholders in separate one-on-one conversations, these one-to-one requests are the most personal and offer the greatest payoff to demonstrate the sincerity of the leader to the stakeholders. Yet, the cost is it takes more time. Or the leader can enroll his, or her, own stakeholder in a meeting (the benefit is less time and more efficient). The cost is losing the benefit of the more personal approach. However, geography or other issues can play an important factor. With geographically dispersed teams, a tele-conference (or online meeting) may be the better choice. Lastly, if it is important to get things moving quickly, a meeting is the way to go.

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- ✓ Agree upon the roles/responsibilities for enrolling the stakeholders

How visible the coach is in the early going is a matter of style and preference. As a Stakeholder Centered Coach, you are definitely more familiar with the process and have practiced the skills associated with enrolling stakeholders. You can obviously give credibility and build confidence in what will follow by being clearly involved.

At the same time, our fervent belief is that this is supposed to be about the leader with his/her stakeholders, and NOT about the coach. The more the leader is seen by the stakeholders as taking full responsibility for her/his own development, the more credit the leader will get in the end.

The challenge here is to provide the right amount of support to the leader at this critical juncture. Do not do too little, nor too much. The enrolling stakeholder can be, and ideally is, a very positive experience for everyone.

If the leader decides to personally enroll the stakeholders, you should support this decision and provide any needed assistance in preparing the leader for this critical task. For instance, you might provide a sample script the leader can use to prepare. If so, be sure to point out what you are providing is only a starting place for the leader to use her, or his, own words around the key points in recruiting the stakeholders.

Also, this is an ideal place to assist by having the leader rehearse with you as if you were one of the individuals being asked to be a stakeholder. And, if there will be a rehearsal with the leader, be sure to practice a script of how to do this yourself in case you need to demonstrate how to do this during the rehearsal.

Just ensure you and the leader agree upon responsibilities in a way that achieves a positive experience for those who will be asked to help the leader succeed in improving the chosen leadership goal.

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- ✓ Properly prepare the leader for the enrolling stakeholder conversation

To initiate the enrolling stakeholder process, it is appropriate for the leader to communicate a positive message to those chosen to be involved. This message would request the potential stakeholders to attend a short: face-to-face meeting; teleconference; or, Zoom call (assuming the leader is not going to personally recruit each stakeholder one-on-one).

Work with your leader to customize the email inviting stakeholders to play their roles to fit his or her style. As the coach you could send a sample email to the leader that he, or she, can use to request this short meeting to kick-off the process. The following would be an example of the message sent to stakeholders who will be recruited.

EXAMPLE: E-Mail to Potential Stakeholders

Dear Colleagues:

As many of you know, I have just completed a 360-degree feedback process designed to provide feedback on specific core competencies and leadership behaviors within our organization. It was a very insightful process and provides an opportunity for me to improve as a leader.

First of all, I want to thank those of you who participated in the 360º process and provided your candid honest feedback to me. I greatly appreciate it and thank you very much. It was very rewarding to receive positive results in a number of areas. Two that were especially gratifying were:

Collaborating across organization/geographic boundaries; and, demonstrating a bias for action.

The report also provided me with helpful information on some leadership behavior I want to improve. I believe it is a very opportune time to address these behaviors. What I plan to work on over the coming year is:

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I will delegate effectively by: 1) providing clear directions; and 2) pushing accountability/decision making down to my team.

The 360º feedback report was only the initial step in what I believe will be a very useful course of action for my development. I hope to enlist you to help me stay focused and improve in the behavior described above. As part of this process I will also be using a coach. I will describe him (her) as my personal trainer and conscience to stay focused on my improvement efforts. I have scheduled a short conference call to introduce him (her), have him (her) explain the process more in depth, and for you to ask questions.

I have asked you to be one of my stakeholders/raters in this process moving forward because I value your constructive input and I know you will be honest and fair. I have scheduled a short (20 minutes or less) teleconference (or zoom) call with all my stakeholders, myself, and "xxx" my Coach on Thursday, November 7th at 8:30am PST. The call-in number is xxx-xxx-xxxx, ID # 795 (or Zoom meeting link). This call will last 30 minutes or less. Please let me know if you can't attend. We can make different arrangements. All of this is important to me.

Thanks for your support.

Another example, meant to illustrate there is not one best way to construct the email, is provided here thanks to one of our most experienced coaches Lilly Linton. In preparing her Leader to share her goal and start the process of enrolling stakeholders, this is a sample email Lilly created for the Leader:

Hello, all!

As many of you know, I have recently completed a 360-degree feedback process designed to provide feedback on specific core competencies and leadership behaviors within our organization. It was a very insightful process and has provided me with an opportunity to see my role and impact as a leader more clearly.

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Thank you to those of you who participated and provided your candid and honest feedback. It is rewarding to understand the traits and behaviors that are recognized and appreciated, and I am motivated to tackle those areas that present an opportunity for me to improve.

Through the XXX program, I have been given the opportunity to work with a coach. My best description of my coach is similar to a personal trainer, acting as my accountability partner to stay focused on achieving my Leadership Goals. As part of this accountability process, I will be tasked with keeping my progress on track and continuing to try out new ways to achieve my desired improvements.

In order to be successful, my coach has suggested that I stay in contact with my stakeholders and continue to gather ideas for refining my approach. As part of this important work, I would like to enlist you as an on-going participant and source of wisdom as I move forward in my development. My request would be to schedule a brief check in each month which will last at most, 15 minutes. We will follow a similar agenda each time, and you will understand the format and process prior to our first meeting. You will understand the goal I am working on, and you will provide insights and observations.

As a primer for our first meeting, you will receive a note from my coach, Lilly Linton. She will outline the simple structure and purpose of the check in meetings and your valued role as a stakeholder in this process.

Thank you once more for your input and efforts to assist me with my development this year. I am excited to work with you and learn new ways to approach my leadership and interactions with each of you.

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The next step is to prepare the leader in how to conduct this preliminary meeting with stakeholders or how to conduct personal one-on-one conversations as the way to enroll the Stakeholders. In either case, explain the purpose is to:

1. Ensure the stakeholders are clear on what the leader will be working on to improve during the year.
2. Ensure the stakeholders understand their role in actively participating in ongoing feedback and suggestions.

Encourage your leader to schedule the enrolling of the Stakeholders soon after receiving confirmation from his or her manager to get the development process moving. If using a virtual meeting format or a teleconference, go over the role you will play during the meeting and what role the leader will play. Use the Involving Stakeholder Steps (p. 18 in this Playbook) to reinforce what is expected of the Leader by following the "Do's & avoiding the Don'ts" when interacting with Stakeholders.

You may want to rehearse the parts the leader will play in the meeting (behavioral rehearsal skill). Have him or her go over his or her role during the meeting and be willing to do the same with your parts. As W. Edwards Deming said: "85% of quality comes from getting the first 15% right." This is an important step to get this yearlong process off to a fast and effective start.

Assist in your role as the coach in the preliminary stakeholder meeting. Whether the leader recruits her, or his own stakeholders; (or uses a meeting format described on the next page), you are successful if you help the leader communicates in a clear, concise, and positive/upbeat manner.

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✓ Enroll the stakeholders and ensure required follow-up takes place

Co-Creator Chris Coffey created the Teleconference process described here and has used it skillfully in all his coaching engagements. Master Coach Andy Taylor adapted this methodology by utilizing his Zoom Meeting Room to accomplish the same outcomes with the ability to: 1) show slides; and 2) allow participants to see each other.

A face-to-face meeting, or a meeting, with all the stakeholders is the fastest and most comprehensive way for the leader you are coaching to move quickly through the Start Smart phase. If you are involved in this meeting it allows you to: 1) observe the person you are coaching apply the involving stakeholder steps; 2) be introduced to the stakeholders as a resource during the year; and, 3) ensure all the stakeholders hear the same message at the same time. In many regards the real customer of this process is not the leader you are coaching. It is the stakeholders.

The goal is for the leader to improve as a leader and get credit from the stakeholders. This will mean the stakeholders will have to be willing to change their perception/opinion of the leader you are coaching. When everything works properly all those involved change in a positive way. The Stakeholder Centered Coaching® process truly affects the whole system, not just the leader receiving coaching.

Roles for the meeting can be divided as follows:

LEADER:

- Kick off the meeting
- Reinforce what was in the email announcing the meeting
- Share their goal in a positive, upbeat manner
- Make any public apologies for past indiscretions (if needed)
- Introduce the coach
- Ask for one or two suggestions (to be emailed to coach and himself/herself after the coach explains the stakeholder role)

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COACH:

- Ask stakeholders if they would be willing to: evaluate behavior from this day forward, let go of any past actions, be honest with their feedback & suggestions from this day forward.
- Go over role you will play with person being coached: personal trainer, conscience, and advisor
- Go over role includes being an advocate for stakeholders and how any conversations you have with them will be kept in confidence
- Explain the mini-follow-up surveys
- Answer any questions about the process

The most critical part of your role in this meeting is to ensure the Stakeholders both understand their role and are committed to playing their role. There is no one prescribed way to introduce the stakeholders to their role. Use a description that feels natural for you.

What follows are the way Marshall describes the role in his book: <u>Succession: Are You Ready</u> from the Harvard Business School series – Memo's to a CEO. You can use this as a script or create your own explanation of how to be a good Stakeholder. The key points to cover, as Marshall wrote them are:

- **Focus on the Future – not the past**. What this means is place more effort in providing ideas on what can be changed tomorrow – not reciting what went wrong yesterday; and, give suggestions aimed at helping the leader to become more effective [Encourage stakeholders to focus on a future that can be changed, not a past that cannot be changed]

- **Be helpful and supportive – not cynical, sarcastic, or judgmental**. What this means is working to help (leader's name) in a positive way, which in turn will likely lead to him/her responding in a positive way. Also, do not wait until (Leader's name) checks in with you if you see something or have an idea for him (her). [In other words, be willing to "*give the leader a chance; and offer helpful suggestions for the future*."]

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- **Tell the truth – and avoid sugarcoating reality**. (Leader's name) is not going to benefit from false praise. While honest feedback can be painful, the cost of not learning from mistakes is much higher. This type of honesty requires courage from the stakeholders.

Immediately after the meeting, ensure an email goes out either by the leader or the coach to all the stakeholders so they can reply with their first suggestions (feedforward) to the leader on his/her developmental goal. Ensure that there is prompt and effective communication back to stakeholders right after the initial meeting(s) builds positive momentum right at the start. Here is an example of what might be sent to stakeholders.

EXAMPLE: Email after Initial Stakeholder Meeting

Dear Colleagues:

Thank you for your commitment to my improvement process. As you remember I have committed to: delegating effectively by providing clear directions; and, by pushing accountability/ decision making down to my team.

I also asked you to:

1. *Evaluate my improvement from this day forward on the leadership behavior I have committed to improve.*
2. *Provide one to two specific suggestions by Tuesday Nov 12th to me, and my coach, on how I could improve on the above leadership behavior with you.*
3. *Be supportive of my efforts to change and provide ongoing honest feedback (positive recognition of change) or pointing out slippage to old behavior I am committed to change.*
4. *Again, be honest in your evaluation of my improvement on the two Mini-Surveys that you will complete over the next year (March and September, 20..).*

My immediate commitment to you is to listen to your suggestions with an open mind, think about it, and then decide what I am willing to commit to and let you know. I will be

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3. *Be supportive of my efforts to change and provide ongoing honest feedback (positive recognition of change) or pointing out slippage to old behavior I am committed to change.*
4. *Again, be honest in your evaluation of my improvement on the two Mini-Surveys that you will complete over the next year (March and September, 20..).*

My immediate commitment to you is to listen to your suggestions with an open mind, think about it, and then decide what I am willing to commit to and let you know. I will be

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working with my coach to develop a specific Action Plan in response to your suggestions. If, at any time you would like to contact my coach, he/she can be reached by email (xxx@xxxxx.xxx) or phone xxx-xxx-xxxx, if there is something you want my coach to know.

Thank you again for your willingness to participate.

Also, follow-up with the leader after the meeting for the purpose of conducting an After-Action Review (another of your coaching skills) and provide appropriate reinforcement and/or recognition.

Additionally, stay on top of the task of ensuring all the stakeholders are submitting their initial two suggestions to the leader so that the Action Planning can start as soon as possible. Have your leader follow up with those who have not sent in suggestions after a few days to "please provide their input so it can be used to build the initial Action Plan."

Finally, send a copy of the behavioral goal(s) and list of stakeholders to the vender you have chosen to run the mini surveys later in the year (See Measuring Progress, p.135 in this Playbook).

SUMMARY OF SMART START

The initial phase of a Stakeholder Centered Coaching® engagement is the most labor-intensive phase. It may also be the most important.

When done well, the end results include:

- The Leader has bought into the process and is able and willing to get started
- Expectations are clear for the Leader, the Coach, and the Stakeholders
- There is a positive sense of momentum and a positive future

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PERSONAL NOTES

Start Smart:

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STAKEHOLDER CENTERED COACHING®

Phase 2: Implement the Action Plan

STAKEHOLDER CENTERED COACHING®

Phase 2: Implement the Action Plan

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IMPLEMENT THE ACTION PLAN CHECKLIST

CHECKLIST FOR STEP 1 – Create the Action Plan:

- ✓ Ensure the leader is prepared to constructively use the Stakeholders
- ✓ Work with the leader to develop an initial Action Plan based upon the input provided by the stakeholders
- ✓ Have the leader share his/her Action Plan with the stakeholders to make it visible to them
- ✓ (Optional) Work with the leader to determine what in the Action Plan will be used in a daily checklist by the leader
- ✓ Review the "Do's & Don'ts" of the first three skills of the Involving Stakeholder Process to prepare the leader for the monthly formal follow-up with stakeholders

CHECKLIST FOR STEP 2 – Leader Follow-ups with Stakeholders:

- ✓ Remind your leader when it is time to check in with stakeholders
- ✓ Work with your leader to ensure the stakeholders are feeling motivated to continue with their help
- ✓ Build needed variety into the process

CHECKLIST FOR STEP 3 – Check in Meetings with the Leader:

- ✓ Ensure both you and the leader are prepared to discuss the input from the monthly follow-up with stakeholders
- ✓ Meet with your leader to debrief the prior months activities and results
- ✓ Work with the leader to re-plan the Action Plan based upon what is learned from the input provided by stakeholders
- ✓ Have the leader share appropriate parts of the revised Action Plan with the stakeholders to make it visible to them

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IMPLEMENTING THE ACTION PLAN

STEP 1. Create the Action Plan

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✓ Ensure the leader is prepared to constructively involve stakeholders

It can be useful once the Stakeholders have accepted their role in helping your leader improve and have submitted their initial suggestions to the leader, to revisit the THINK, RESPOND, & CHANGE steps from the Involving Stakeholder process with the leader. Reviewing these three steps of the 7-step process are very important the first time the leader has received feedforward from the stakeholders.

In the Appendix (pp. 162 – 199) you will find useful background on these steps to use with your leader in preparing her, or him, for the task of creating the Action Plan.

Do not make this too formal a conversation. The purpose is simply to remind the leader of the value of remembering the “Do’s & Don’ts” of involving stakeholders when developing the initial draft of the Action Plan.

In the conversation, guide your leader to only pick suggestions for the Action Plan that the leader is willing to do. And advise your leader not to pick suggestions just because they sound good, or because a particular individual provided the input.

At this time it is helpful to discuss with the leader both when, and how, to gather input from their stakeholders moving forward. In conjunction with building the cadence of the leader’s follow-ups with the stakeholders, this is a good time to agree upon the frequency of contact points between you and the leader during the first few months.

Regarding the frequency that a leader formally follows-up with each stakeholder, our rule of thumb is this should occur once a month for the duration of the coaching assignment. What the leader does in these short (3 – 5 minute) follow up conversations is to ask for feedback on the prior 30 days and, FeedForward (suggestions) for the following 30 days.

This is not a meeting that needs, or should be, formally put into the leader’s and stakeholders’ calendar. It is a very focused conversation on the topic of the leader’s implementation of the Action Plan.

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Between those formal follow-up's you and the leader need to decide when, and for how long, will you meet to discuss what is happening. Some leaders need more assistance from the coach than others. A rule of thumb is to have a weekly short check in for the first few months. This typically is a 15 to 30 minutes scheduled appointment to review what is happening and provide support.

Also, set up whatever method will be used for you to receive the suggestions from stakeholders. The trick here is to use a method that is comfortable for the leader. In today's world many leaders are tech savvy. They may have their own preferred method of capturing stakeholder input. Online tools are being created constantly that can be useful for this task.

Also, there are still leaders (and coaches) who prefer not to use technology. Use either a Word document or an Excel spreadsheet to collect and keep track of the input provided by stakeholders. Make the process as easy as possible for the leader you are coaching. Have the leader send all stakeholder input to you for your own records. Then, you can input the suggestions into your own notes.

SAMPLE: Capturing Stakeholder Suggestions

MONTHLY FOLLOW-UPS
20..

JANUARY

Feedback from Last Month *"How did I do last 30 days?"*	**FeedForward for Next Month** *"Suggestions for next 30 days"*
Stakeholder:	Date:
Stakeholder:	Date:

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Assuming both the leader and the coach have a copy of the initial input provided by stakeholders, set up a time to collaborate on a "first" iteration of the Action Plan. The purpose of this meeting is to:

1. Clarify the suggestions and, if necessary, craft them into behavioral statements
2. Prioritize the suggestions based upon desired results
3. Plan what to do based upon the prioritized list

Prior to the meeting take the time to review all the collected stakeholder suggestions. Look through the suggestions for the ones you feel are most appropriate to work on at the start (will add the most value to the leader in achieving the goal). And one of the skills to use here is an eye on general suggestions that when they are reworded into clearer, behavioral items may be good ones to put into the Action Plan.

Plan for Action	
INCREASE THE FOCUS	**ACCELERATE THE EXECUTION**
• Distinguish objectives/ends from the actions/means	• Help identify and tap hidden resources/assets
• Define success (Identify success measures)	• Push the schedule
• Help construct specific, actionable suggestions	• Keep emphasis on the desired effects

In today's working climate, leaders are excessively busy. It is our experience that you cannot assume the leader you are coaching will protect the time to work on his or her personal goals without your assistance. A good plan, by itself, will enhance any leader's confidence of future success.

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Keep the plan simple by only including actions the leader is willing to implement. A good rule of thumb is to keep the initial Action Plan to around a half dozen specific actions that together will achieve the desired effect of the leader improving; and, being clearly recognized by the stakeholders for that improvement. There are no hard and fast rules here. We have seen leaders make dramatic strides in the eyes of their stakeholders by implementing only a couple of specific actions. Other leaders have implemented a plan with more than a half-dozen items and achieved the same effect.

Start the "initial action planning" meeting by asking the leader for his/her assessment of which suggestions they feel help achieve and the goal and they are willing to implement. Assist the person you are coaching in prioritizing the suggestions for usefulness in achieving the desired change represented in his or her behavioral goal. If needed, help the leader come up with more specific and concrete behaviors that will be of high enough priority to go into the plan.

Your primary role in this process is a facilitator, helping the leader translate the stakeholders' suggestions into the Action Plan. You may also provide your own suggestions along the way if needed. **Just remember, it is the stakeholders, seeing their own "fingerprints" on the Leader's plan, that will provide the most value.**

Once the monthly follow-up process is started, every month you will continue to use your "Action Planning skills" to discuss suggestions from stakeholders that might be added to, or replace, current items in the Action Plan. **As a coach you add the most value in this process by helping your leader come up with a set of actions that are clear, concrete, and observable.**

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✓ Have the leader share his/her Action Plan with the stakeholders to make it visible to them

After agreeing to the plan of action, assist the person you are coaching to craft a response to his or her stakeholders. This response could be sent as an email, communicated face-to-face to the stakeholder team, or communicated one-on-one. Even if the leader initially wants to communicate the Action Plan in person, each stakeholder should be sent a copy of the Action Plan. This will help them to pay attention when observing the leader working on the goal. Being timely in this communication helps manage the perception that this development process is important to the person being coached.

EXAMPLE: Responding to Initial Stakeholder Suggestions

Dear Colleagues:

Thank you for taking the time to provide me with your suggestions around my goal of: I will delegate by 1) providing clear directions and, 2) by giving more responsibility for decision making to those who are ready (ability & willingness).

I have spent a good deal of time thinking about what was proposed to me. Some of the comments I plan to implement immediately. Others, I plan to implement a few months from now. I want to be careful not to over-promise and fail to deliver.

What I plan to start immediately is the following:

1. *Be more succinct when giving direction to others (reduce the verbiage).*
2. *Checking on the clarity of my directions with the team (or individual) before changing to another subject.*
3. *For each direct report come up with a list of tasks to discuss the appropriateness of delegating to them; send this list to them to review and meet with them to discuss the conditions that would warrant delegation of these responsibilities.*

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4. *Include an end-of-the-week status check on what has been, and what could have been, delegated.*

As I implement these steps, I would like your feedback in real time. Anything specific you can provide regarding the success and failure to meet these steps would be greatly appreciated.

Thank you for participating in my continued development to improve as a leader.

It is not necessary for the leader to include everything the two of you agree to in the Action Plan. Some aspects of the plan may be useful to keep private. In many cases the complete plan is communicated to the stakeholders. What is important is for the stakeholders to know what to pay attention to and provide feedback on when the leader checks in with them.

In everyone's busy and over communicated lives, **it is amazing what stakeholders will miss in observing the leader implement the Action Plan. Having a copy of the plan, which can be referenced in conversation between the leader and stakeholders, helps everyone involved pay attention to what is happening**. Being clear and obvious pays off here for the Leader.

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- ✓ (*Optional and highly recommended*) Work with the leader to determine what in the Action Plan will be used in a Daily Checklist by the leader

When you combine the two coaching skills of Action Planning and behavioral reinforcement, a very useful tool to use is a daily checklist. In 2009, Atul Gawande wrote a definitive book on the subject with his <u>Checklist Manifesto</u>. He documented how, with the use of checklists, the number of positive outcomes from surgery rose significantly on critically important criteria along with the obvious decrease of negative outcomes.

The same can be achieved for changes in leadership behavior with the use of a daily checklist. For our purposes a checklist is simply a summary of the most important actions on the leader's Action Plan. Through trial-and-error Gawande found that the characteristics of an effective checklist for surgery were:

1) Keep the list short
2) Include the steps most dangerous to skip or are most often overlooked
3) The wording should be simple and exact

When you consider the leader you are coaching, the same guidelines make sense for Action Planning. Leaders are too busy to keep track of a lot of things, so keep the number of items being tracked manageable. There are certain behaviors in the Action Plan that are more valuable than others to implement or might easily go unnoticed, so include those actions. And the wording of the actions is better when they are easily understood and unambiguous in meaning.

For instance, in a real coaching situation a leader was working on the leadership goal of collaborating and listening to different points of view with an open mind. The checklist used to keep the Action Plan conscious was:

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SAMPLE: Daily Checklist

Daily Checklist Questions	M	T	W	T	F
Ask questions with intention of proving someone else right	N	N	Y	Y	N
Defer to someone else's POV	N	Y	Y	Y	Y
Consciously think "Do I need to say this" before speaking	N	Y	Y	N	Y
Paraphrase back your understanding of what someone said	Y	Y	Y	Y	Y
Differentiate between fact and opinion (yours or others)	Y	N	Y	N	Y

It is optional whether the leader would send this summary of "yes" and "no" responses in the checklist to the Coach every week. For some leaders this is probably necessary for them to act accountable for their Action Plan. For other leaders, it is not necessary to send the report to you. If you are having a weekly check in call with your leader, sometimes simply asking how the week went is enough.

If you listen to the wisdom of Marshall Goldsmith in Triggers, a daily reminder at either the beginning or end of the day is a very important effective ritual to use. Marshall has been using this ritual for a few decades now himself. He first used a peer coaching process with his good friend Jim Moore. They both wrote their own questions and each day, no matter where they were in the world, they touched base and went through their questions. This only took a few minutes. The rules were simple. We won't judge each other, and we won't deceive each other.

Now Marshall tells his audiences that he pays a woman to call him every day. She then reads the questions he wrote for himself. All questions are answered with a "yes," a "no," or a number. With over 11 million frequent flyer miles, Marshall knows he will fail in acting the way he wants to act unless he follows this discipline. If this process

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TIPS:

When Action Planning on suggestions, utilize whatever methods makes sense to you and the leader. If the leader you are coaching is particularly wedded to a certain approach to developmental planning, adapt to his or her approach. One simple method covers the obstacles, resources, and actions required to implement the behavioral goal, or a general suggestion.

Back in the 1980's when we first started providing leaders going through our training with 360º feedback on the leadership concepts we were teaching, we used the following one-page Action Planning document to help the leader flesh out what to do based upon the feedback and learning they had received.

SAMPLE: Action Planning Stakeholder Suggestions

BEHAVIORAL GOAL (Leadership Skill Leader has chosen):	
OBSTACLES:	RESOURCES AVAILABLE:
ACTION STEPS: (by when)	

If you use a framework like this, here is where your role of "expert" coach would come into play. For instance, if you are an expert in any

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When Action Planning on suggestions, utilize whatever methods makes sense to you and the leader. If the leader you are coaching is particularly wedded to a certain approach to developmental planning, adapt to his or her approach. One simple method covers the obstacles, resources, and actions required to implement the behavioral goal, or a general suggestion.

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SAMPLE: Action Planning Stakeholder Suggestions

BEHAVIORAL GOAL (Leadership Skill Leader has chosen):
OBSTACLES: RESOURCES AVAILABLE:
ACTION STEPS: (by when)

If you use a framework like this, here is where your role of "expert" coach would come into play. For instance, if you are an expert in any

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one of many personality frameworks you might use this wisdom to help the person you are coaching understand obstacles that need to be addressed given his or her own personality profile and/or the profile of key individuals that need to be influenced.

One sign of the likelihood the leader will improve is how much the person is willing to get outside of his or her own comfort zone. Real change requires a person to do something different. Ask the question: *How much of what we are planning is inside and outside your comfort zone*? Make a note of the actions that are most "*outside the comfort zone*" for the person. Here is where you can be most helpful with your personal coaching.

Be supportive of the normal feelings that arise when trying out a new behavior (unsettled, uncomfortable, and somewhat phony). Remind the person that very few things of value come easy. If personal change were easy, we'd already have done it, and none of us would need support to improve.

As a final step of the Action Planning, ask the question: "*How are you going to make this visible to your stakeholders*?" What a lot of people do poorly is communicate what they are doing and why they are doing it. Especially when changing behavior, it is necessary to put out the banner "under new management." It is like a restaurant that goes out of business. The new owners will not get people to notice and come to try the new menu and service without a visible announcement. Communication itself is a behavior that is useful to orchestrate around a leader's Action Plan.

Based upon the Leader's readiness to finalize the plan either: the leader completes the plan and sends a copy to you; or, you fill in the plan based upon the discussion and send a copy to the leader.

Reinforce the idea that one of the best ways to act accountable to implement the plan is the use of a daily checklist. Set the expectation that the execution of the plan will be the focus during a monthly review each month.

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- ✓ Review the "Do's & Don'ts" of the first three skills of the Involving Stakeholder Process to prepare the leader for the monthly formal follow-up with stakeholders

Send out a reminder to the leader you are coaching prior to the time of the month for them to check in with stakeholders. In the first few months while doing this, jog the leader's memory on the first three steps of the Involving Stakeholder "Do's and Don'ts." The steps of ASKING; LISTENING; and THANKING are what the leader is doing during these brief follow-up meetings.

Success in making a positive long-term improvement in leadership behavior and getting credit from stakeholders through their change in perception, is a function to two things. The first is the consistent follow-up by the leader. The second is the behavior of the leader during these follow-up conversations.

For your own preparation to reinforce using the "Do's" of ASKING, LISTENING, and THANKING; as well as avoiding the "Don'ts" of these same behaviors, refer to the Appendix – pp. 165 - 179]. Asking, Listening & Thanking are all about demonstrating gratitude by the leader. Adrian Gostick & Chester Elton wrote an excellent book titled Leading with Gratitude. Both Adrian & Chester are certified Stakeholder Centered Coaches, and their book is a treasure trove of advice on the use of gratitude.

Listening, like thanking, is about body language. It is not just the words or the handshake. For instance, how a person says "thank you" includes the whole body. When we are on the receiving end of thanks, we see the intention more than we hear the words. Thanking with sincerity requires bringing the entire body into play.

If, in your judgment, the leader would benefit from rehearsing with you before they do their monthly stakeholder follow ups, suggest the leader practice with you acting as a stakeholder. The goal here is the leader comes across in a positive and genuine manner (and is a good role model of Ask, Listen & Thank.

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IMPLEMENT THE ACTION PLAN

STEP 2. Leader Follow-ups with Stakeholders

CHECKLIST FOR STEP 2

- ✓ Remind your leader when it is time to check in with stakeholders
- ✓ Work with your leader to ensure the stakeholders are feeling motivated to continue with their help
- ✓ Build needed variety into the process

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- ✓ Remind your leader when it is time to check in with stakeholders

Maintaining a monthly pace for following up with stakeholders is our gold standard. This cycle should coincide with your own follow up with the leader to review what is being learned from these check-ins by the leader.

If you agree with a formal follow-up schedule of every six weeks, or every two months, this too will increase the possibility that stakeholders will not perceive the leader as serious about improving. Our recommendation is do not agree to any follow up sequence that is longer than one month. Success occurs when the stakeholder perception is the leader is committed to the process and taking the necessary steps to change a behavior.

As was mentioned earlier in this Playbook, the week prior to the week of formal follow-ups, put in your calendar to remind the leader that the coming week is the time to check in with all the stakeholders.

During the week the leader is doing his/her formal follow-ups you may want to send a message encouraging the leader to continue to find the right moment to check in with each of the stakeholders; and use this message to schedule your follow up call/meeting to review what is being learned (if it is not already in both of your calendars).

In working with your leader, the right level of momentum is maintained through a rhythm of reviewing the past month's actions (through one type of After-Action Assessment) and preparing for the next month based on what was learned from the stakeholders input.

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- ✓ Work with your leader to ensure the stakeholders are feeling motivated to continue with their help

During the monthly planning meeting help the leader determine if what he, or she, is asking for the next month's follow-ups need to change. Instead of simply asking a general question like: "*What have you noticed in the past month?* help the leader dig deeper with more focused questions. This may mean asking more specific questions around one of the suggestions being implemented or asking for feedback relative to the goal from a specific key meeting where a stakeholder at been at the meeting.

If the number and quality of suggestions are good, you may want to continue asking the same FeedForward question(s). When the number and quality of suggestions start to trail off significantly, or if it makes sense for the plan to move to a more specific focus, determine how you will help refine the request for suggestions through more targeted and specific questions.

For instance, if a person is working on delegating more effectively, a more targeted question that might drill down to a relevant subset of delegating, such as: "*Could you give me some suggestions on what tasks you have enough ability and skills, along with enough confidence where I can delegate to you around our upcoming strategic planning*?"

Getting the Most out of Stakeholders

As we quickly learn, almost all stakeholders are very willing to help. They gladly accept the invitation to be a stakeholder. Yet the role of being a good stakeholder is not simply about motivation. Being a good stakeholder also requires certain skills. These skills include the ability to: 1) pay attention and notice the leader's behavior; 2) provide honest and accurate feedback on the leader's behavior; 3) provide feedforward in the form of specific behaviors that will help achieve the leader's goal; and 4) maintaining a supportive environment of reinforcement for the leader's efforts and results.

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Quite a few stakeholders do not appear to start the process applying the necessary skills for giving very useful feedback/feedforward. It is important to remember; it is not how things are at the beginning that matter. It is how they are at the end of the process. This is why the Stakeholder Centered Coaching® process is so powerful. A leader almost always improves. Stakeholders learn very valuable skills in giving feedback/feedforward; and also change themselves. Everyone is more authentic and effective at giving each other feedback and suggestions.

The question here is: "*How can we as coaches assist in the process to ensure all good things happen by the end*?" Obviously the first thing is to ensure stakeholders understand what is being asked of them to do at the time they are asked to participate. As we know, this includes a willingness to: 1) evaluate the leader from the present and into the future and leaving the past in the past; 2) provide honest feedback on what they see in terms of the leader's behavior; 3) share helpful suggestions on what the Leader can do to be more effective with them; and, 4) complete the anonymous mini-surveys when asked.

This process of setting expectations up front is all about "willingness." It does not consider the necessary ability and skill of the stakeholders to effectively live up to those expectations. As previously alluded to, most stakeholders have the best intentions to help. What is often lacking is the skill to observe specific behavior and give specific feedback on what is noticed. Additionally, the ability to give concrete, well-crafted suggestions on how to improve is not well developed.

We do recommend the leaders, at the beginning, check in monthly with very open-ended questions like: "*What have you noticed in the last 30 days regarding my goal to improve in…*?" And "*Do you have any suggestions on what I can do next month to better achieve my goal*?" With open-ended questions like this, many stakeholders do not seem to have much to say or contribute in the first few months. Often, they respond with equally open-ended comments like: "*You are doing great*" (when asked for feedback), and "*Just keep up what you are doing*" (when asked for feedforward). Although these feel good to receive, such comments leave the Leader feeling somewhat empty because they received nothing specific that is helpful.

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There are a couple of remedies to make these follow-ups with stakeholders much more effective for everyone. And it all has to do with the leader asking more specific, concrete questions. Here is where the coach can add substantial value to the process. The coach can suggest to the leader ways to get more tangible feedback and suggestions.

For instance, before the monthly follow-up with stakeholders the coach can prepare the leader by anticipating that many of the stakeholders may struggle to give any real feedback. The coach will guide the leader to come up with a couple of situations where they attempted new behaviors in the past few weeks and ask the Stakeholders "*how did these very specific events go in their eyes*." In other words, the Leader will probe for feedback on a specific meeting/interaction that occurred in the prior month.

An example would be a leader who is working on improving his communicating of information to peers in a timely fashion. As the coach you would, prior to the leader following up with stakeholders, discuss what the leader implemented related to his or her goal. In this example, the Leader might have made a short presentation at his manager's staff meeting a couple of weeks earlier in the month where she did things differently because of her Action Plan. In this case the leader had prepared a couple of slides and a one-page summary handout of a key project that has an impact of all his peers.

This was deliberately done because of an action step in the Leader's goal of improving timeliness and quality of communication. Being prepared, the leader would ask for each Stakeholder's observations over the past month and bring up what the stakeholder remember from the presentation done in the manager's staff meeting last week.

Even if the Stakeholder says: "*I didn't notice*," the Leader can say: "*O.K. let me replay what I tried to do and get your suggestions on how I could do it better*." The process here is to replay a situation for a stakeholder and ask for feedback based on what was done. Even when the stakeholder remembers the situation and can give concrete feedback, the leader would follow the feedback given with asking for any feedforward to improve. The leader can ask for suggestions on

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what he/she could have done differently and better the next time this type of situation occurs.

The key here is the leader is demonstrating a genuine interest in improving and wanting objective feedback on what is working and what is not working well.

Besides helping the leader come up with specific situations to check in to get concrete feedback, it is also useful to have the leader prepared with asking for help with an upcoming situation. Here the leader can ask a stakeholder for specific advice for a situation they will face in the coming weeks. This is especially helpful with stakeholders who have not had much exposure to the leader over the past 30 days. It gives these stakeholders a way to contribute to the leader's success even if they have no feedback on the prior 30 days.

Using the same example of a leader who is working on improving her communicating information to peers in a timely fashion, a feedforward specific question might be something like: "*Next month on Project X, we are not likely to hit a milestone to report, yet we will be getting some preliminary numbers on… What would you suggest I communicate here and using what method* (i.e., email, at the staff meeting, etc.)?" This engages stakeholders in a meaningful way to help with specific advice and counsel. It also helps keeping them aware that the leader is working to improve on the goal. **Nothing will change a Stakeholder's perception of a leader improving faster than seeing that leader implement the stakeholder's ideas.**

Keeping the Leader Motivated

Also, one of the most important tasks you have is to keep your leader motivated. Always look for opportunities to remind the leader of suggestions that have been implemented successfully. Capturing success can rejuvenate the energy to begin a new month's Action Planning cycle. You are not only the conscience of the follow-up process. You are also the conscience of "recognizing success" process. One of the best roles you play is being the one to consistently point out to the leader her, or his, successes.

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Don’t forget one of your important coaching skills, namely behavioral reinforcement.

Provide Positive Support	
ACTIVELY SEEK DATA ON RESULTS	**ACT AS AN “ANGEL” ADVOCATE** (vs. a devil’s)
• Look for approximations of success	• Regular doses of reinforcement work best
• Focus on the matches (not mismatches) to desired effects	• Always tie to some specific action taken/result achieved
• Seek out positive news from stakeholders/others	• Encourage others to provide positive feedback

Another way to add value as the coach is to revisit past suggestions that were not chosen for implementation at the time they were first suggested. This is why it is useful for you to have a method of capturing all input from stakeholders and periodically reviewing your own notes. One goal many of our Stakeholder Centered Coaches hold is ensuring that at least one suggestion from each stakeholder is implemented sometime during the engagement (at least with that person).

This is not always possible. Yet, there is a real benefit if, over the course of the engagement, each stakeholder notices that the leader implemented one of their ideas in the process of getting better. One thing to keep in mind in the pursuit of this outcome is it is not necessary that every suggestion be implemented with every stakeholder. It can be that a suggestion may only need to be implemented with the specific stakeholder who suggested it.

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✓ Build needed variety into the process

All humans prefer routine, habit, and patterns. And all humans have a preference for a certain amount of variability and novelty in their lives. If you want a sign that this second preference is not being met is when the person shows boredom. As coaches we also have the same needs. The Stakeholder Centered Coaching® process is one characterized by regimen and discipline.

Our role is to help instill this discipline/regimen into the daily actions of the Leader. **Regardless of the goal selected, we want our leaders to rigorously use the "Do's of the 7-Step Involving Stakeholder process" every time they discuss their goal with a stakeholder**.

We also want them to scrupulously follow up with stakeholders once a month. The best follow-ups are short, focused and are positive interactions for both parties. Mike McCartney, also coined an appropriate phrase here – "the 3Fs" – Frequent, Fast, & Focused.

When the follow-up is conducted face-to-face, this allows the leader the best chance of showing "courage, humility, and vulnerability." If a leader has been, with most stakeholders, able to personally check in for many months, it might be time to do the formal check in by email to provide some variety in the discipline. Not only is there nothing wrong with this; it may provide the needed variety for the leader, the stakeholders, and the coach.

TIPS:

The concept behind maintaining momentum is like the concepts of rhythm. As a coach, one thing to pay attention to is the rhythm of action by the leader over the course of the coach engagement. During the Change and Follow-Up Steps in the Involving Stakeholder Process, (Appendix pp.191 – 199), you do not want to let this flow, or rhythm, be left up to chance. Without careful orchestration on your part as the coach, what typically happens is a choppy flow of starts and stops by the leader in following up with stakeholders.

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Plan your own interventions to help maintain momentum. A brief email reminder, an excerpt out of an article that is relevant to what the person is working on, a pertinent short video can provide the spark that maintains a sense of ongoing momentum for the leader.

Where you are most helpful as a coach is keeping track of:

a) Stakeholder suggestions
b) Commitments and actions the Leader is doing
c) Learning and results achieved

Do not allow yourself, or the person you are coaching, to get overwhelmed with details. What is important is to keep tabs on the most important ideas and actions that will achieve the desired effect. Is the leader demonstrating to stakeholders' positive change on the behavioral goal?

If the person you are coaching prefers short meetings (i.e. 15 to 20 minutes), separate any After-Action Review from the FeedForward planning. Split them up into two meetings. Conduct a quick After-Action Review first, followed with the Action Planning soon afterwards. If the person has the time and would prefer longer meeting (30 to 45 minutes or more), use the first half of the meeting time for the After-Action Review and the second half focused on the future month.

Keep your eye on the pace of improvement. Successes that come too easy can lead to complacency. Caution a leader that seems satisfied too early that "replicable success over time" qualifies as a learned skill, not some early wins. Stress your guarded optimism with the success to date and your desire for them to continue to replicate this success in the coming months.

Just as easy success achieved immediately is something to be watchful for, the lack of success also needs to be monitored and managed. Another reminder from a legendary college football coach was a simple 3-rule philosophy he instilled in his players. This was: 1) If you get knocked down, get up; 2) Whatever you do, do it as a team; and 3) [*most relevant here*] If it comes easy it is not worth a dime. Provide encouragement and ongoing support for the leader who is working on a difficult behavioral change.

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Plan your own interventions to help maintain momentum. A brief email reminder, an excerpt out of an article that is relevant to what the person is working on, a pertinent short video can provide the spark that maintains a sense of ongoing momentum for the leader.

Where you are most helpful as a coach is keeping track of:

a) Stakeholder suggestions
b) Commitments and actions the Leader is doing
c) Learning and results achieved

Do not allow yourself, or the person you are coaching, to get overwhelmed with details. What is important is to keep tabs on the most important ideas and actions that will achieve the desired effect. Is the leader demonstrating to stakeholders' positive change on the behavioral goal?

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At some point you may want to email a PDF copy of the Sample below as a reminder of the 7-Step process (or provide it as laminated card). There is no new information here. This is simply a way to reinforce the message.

SAMPLE: Keys to Involving Stakeholders

1. ASK
- Ask stakeholders for feedback/feedforward
- Send a message that you value their opinion
- Communicate your desire to improve

2. LISTEN
- Listen to what stakeholders have to say
- Try not to evaluate whether they are "right" or "wrong," simply accept their opinions as their perception of reality
- Avoid trying to defend your actions

3. THANK
- Express your appreciation for the feedback/feedforward
- Recognize that it may take courage on their part to give you feedback or suggestions
- An immediate "thank you" reinforces the process

4. THINK
- Think about stakeholder input before reacting
- Avoid over-reacting (too emotional)
- Better to under-commit and over-deliver (keep commitments)

5. RESPOND
- Respond to the stakeholders who gave you input
- Let people know the areas where you plan to change
- Keep it simple; do not try to change too many behaviors

6. CHANGE
- Find ways to remind yourself of your area of change
- Do something about the feedback/feedforward
- Monitor your own behavior on a timely basis

7. FOLLOW-UP
- Check in with stakeholders on a repetitive basis
- Ask them if they think that you are changing
- Continue to use steps 2 through 6 when following up

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IMPLEMENT THE ACTION PLAN

STEP 3. Check in Meetings with the Leader

CHECKLIST FOR STEP 3

- ✓ Ensure both you, and the leader, are prepared to discuss the input from the monthly follow-up with stakeholders
- ✓ Meet with your leader to debrief the prior months activities and results
- ✓ Work with the leader to re-plan the Action Plan based upon what is learned from the input provided by stakeholders
- ✓ Have the leader share appropriate parts of the revised Action Plan with stakeholders to make it visible to them

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- ✓ Ensure both you, and the leader, are prepared to discuss the input from the monthly follow-up with stakeholders

Our process strongly recommends that the leader follows up monthly with each stakeholder. It is advisable to schedule a meeting as soon after those follow-ups occur with the leader in order to debrief what the leader is learning from those follow-up conversations.

Our common approach to these formal monthly follow-ups is to agree with the leader on a consistent week in the month to meet with all the stakeholders' one-on-one. As the coach you would send a reminder to the leader toward the end of the week prior to the follow-up week stating: "*Next week is the time to personally follow-up with each of your stakeholders*."

Immediately following the week that the leader follows up with the stakeholders you want to schedule a meeting to discuss what the Leader learned and how the meetings went. To productively use the time with your Leader, it is helpful if the feedback and suggestions received by the Leader is reviewed by both of you prior to meeting. This is not mandatory, yet it allows you to prepare for the conversation. If agreed upon, the leader can forward notes taken from these formal Follow-up follow-ups.

It is a characteristic of our process that we do not use up a lot of time in our coaching. Our goal is to use the least amount of time necessary to help the leader achieve positive, long-term improvement in the chosen leadership behavior. As a rule of thumb, the meeting with the leader to review the last month, and plan for next month, should take about 30 minutes. What you can do, whether you have any of the specific feedback or not, is to look over the Action Plan items and prepare to ask questions about what did or did not happen with some of those behaviors.

A few days before the meeting, send out a reminder (email or voicemail) of the scheduled meeting to debrief steps taken from last month's Action Plan. Here is an example of the email you could send out to the leader a few days before your scheduled call:

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EXAMPLE: Email Reminder for After-Action Assessment

Dear:

In order to continue learning as we go, I would like you to review your implementation of your Action Plan over the past month. In preparation for when we talk on (date), think about these four questions:

1. *What did I set out to do (in the Action Plan)?*
2. *What happened (the good and the bad)?*
3. *Why did it happen?*
4. *What will I do next time?*

The desired effect of our call is to reinforce each of your successes and ensure we correct any needed actions before next month begins. I look forward to our next conversation. If you would like to send anything in advance to help prepare me for the call, I will be sure to look it over in advance.

This is only one way to run the meeting. It is an effective one, yet use whatever approach is helpful to the leader. There is nothing wrong with varying how you run this meeting. For instance, one variation is to ask the leader to share the most positive feedback from stakeholders related to the goal; and, the least effective thing that happened. And, it is always an effective way to start these meetings asking the leader – "*What do you want to discuss and get out of today's meeting*?"

Review your own records from you prior meetings to remind yourself of anything that would be relevant to discuss in the upcoming meeting. Check your notes regarding where the person was implementing steps outside his or her normal comfort zone. You may spend a little more time on these steps in the plan.

It is your job to keep track of the suggestions being made from the stakeholders to be a valuable conscience to your leader. Look for ongoing, and new, patterns in these suggestions or feedback. How you keep track of suggestions can be either by stakeholder, by month, or both; whichever seems to make sense for you and the leader.

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✓ Meet with your leader to debrief the prior months activities and results

It is up to you to determine how you work with your Leader to conduct a review of the last 30 days and plan for the coming 30 days. One very effective method is to use the discipline created by the U.S. Army to learn immediately after doing using a four-question methodology called the After-Action Review.

If you use the four-question of the After-Action Review as your methodology to facilitate the conversation, this is how you would structure the conversation.

- What did you set out to do (from the Action Plan)? Have the person you are coaching re-state what the desired effect was for the actions taken. This should not take up much time. The purpose here is to form the basis for comparing the plan with results. **[Goal]**

- What happened? Have the person you are coaching replay for you the sequence of what took place. Keep this moving at a brisk pace. The majority of time should be spent on the next two questions. **[Outcome]**

- Why did it happen (and what insights from what happened)? Analyze and examine the causes and effects to what happened. At this stage, the goal is to tease out the underlying reasons for success or failure with honesty. **[Learning]**

- What will you do next time? Here is where the learning is clearly articulated. Initially, the process usually focuses on areas for improvement. But with experience there are fewer and fewer problems and attention shifts to sustaining successes. **[Do]**

Master level Coach Mike McCartney coined this as 'GOLD" [**G**oal, **O**utcome, **L**earning, **D**o]. Mike is very good at mining for gold.

Use your time wisely. If you cannot review all actions taken, focus on the actions/situations that are most important. Also, there are many forms of "After-Action assessments." For instance, you can simply ask: "*What worked for you last month? What didn't work for you? What did you learn?*

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Varying your approach over the course of the engagement regarding how you conduct your meetings is up to you and the leader. Some coaches and some leaders like the familiarity and consistency of using one approach. Others like a bit of variety of how they debrief and plan things. Whatever methods you use, summarize and document the key learning for the leader (take notes). Summarize and send key take-aways from your conversations to the leader as a reminder. Keep a file on each After-Action Assessment to provide you with a chronological flow of learning over the year.

SAMPLE: After-Action Review (Our most popular type of After Action Assessment)

1) What did you set out to do?
   Build a positive team spirit that delivers strong results by continuing to actively solicit input from my team and gain a better understanding how my emotional and rational responses have either a positive or negative impact on others.

2) What happened?
   a. Situation where Cindy recognized me starting to get mad and then saw me calm down and move the discussion further during a winemaking review
   b. Situation where asking more questions from Dennis allowed me to go with his idea and defer to his judgment on the XXX Plan
   c. Announced in the agenda for our next off-site leadership meeting that it would be a democratic decision and put together a plan to get everyone involved.
   d. Situation where Teri wanted to award more dollars to Celia that I felt comfortable giving to her; however, I deferred the decision to Teri after informing her of my reservations.
   e. Conversation with Patrick about Robert B.– Started it by asking Patrick his impression of Robert versus telling him what my impression is…This allowed for a much better review of Robert's performance and allowed Patrick to formulate a plan for him.

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3) Why and what insights have you had?
   a. Asking questions and being open is a winning combination. I go into discussion hoping to have my mind changed – I look for opportunities to defer to others point of view
   b. The team responds better when I am even tempered.

4) What are you going to do moving forward to maximize this investment?
   a. Keep listening to my team
   b. Keep promoting dialogue
   c. Keep using upper management as a sounding board

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- ✓ Work with the leader to re-plan the Action Plan based upon what is learned from the input provided by stakeholders

In Stakeholder Centered Coaching® the Action Planning process is dynamic. Every month the plan can change based upon what is learned from stakeholders. Most months the plan does not change. Most months the plan stays the same because the input from stakeholders does not lead to adding or refining any of the action items.

When the plan does change is when a stakeholder adds value by suggesting a new action item that adds substantial value and the leader is willing to implement it. Other changes can occur in the Action Plan if a stakeholder does not offer a new suggestion; yet offers a more specific enhancement to an existing action item in the plan (rewording).

For instance, a leader might have an action item in her/his plan that reads: *build onto or defers to the ideas or suggestions of others*. In checking in with stakeholders one stakeholder pointed out that the leader seems to have the most difficulty doing this in the team's weekly planning meeting. A refinement of the Action Plan could be to: *build onto or defer to at least one ideas of another team member in each of the team planning meetings next month.*

As the leader gains experience implementing the plan and achieves a level of success, it often leads to refining of the plan into more specific areas. Stakeholders, whose role is to provide both feedback on the plan and further suggestions, gain comfort and skill over time. This opens the possibility to constructing a better plan than was initially build from the first set of stakeholder suggestions.

Be careful, however, not to change the plan simply because some new thinking is being provided. The goal stays the same. Any changes made need to clearly improve the plan aimed at achieving the goal selected by the leader to become a better leader.

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✓ Have the leader share appropriate parts of the revised Action Plan with stakeholders to make it visible to them

What greatly assists a leader achieving success in his/her leadership goal is the reinforcement provided when stakeholders recognize the improvement. This, in turn, is more likely to happen if the stakeholders know what to look for and pay attention to in reviewing a leader's progress.

As a final step in your monthly re-planning meeting, help the leader decide what, if anything, is communicated to the stakeholders. An example of an email that could be sent out by the leader is:

EXAMPLE: Responding to Monthly Stakeholder Input

Dear Colleagues:

Thank you for taking the time to provide me with your ongoing feedback and feedforward around my goal of: improving my listening.

I have spent time thinking about what I learned from checking in with you at the end of the month and feel encouraged by a lot of what you told me. I am also especially grateful for the suggestions on how I can do even better.

I am adding as a refinement to my Action Plan, which you all have a copy. One of my action items has been to build onto or defer to the ideas or suggestions of other team members. What I am specifically adding to that item is: over the next month, every week when we have our team planning meeting I want to add to or defer to at least one idea of another team member.

In addition to the other actions on my plan, would you please monitor me and provide me feedback on this specific action?

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TIPS:

Make the After-Action Assessment (AAA) process routine and real-time. Do not let busy calendars, and the crunch of things to do, keep you and the leader from this discipline. The After-Action Assessment process is working when there is a state of mind where the leader is continuously assessing: *“How I can improve?’*” Such discipline ensures that learning after doing become second nature.

Establish clear guidelines for your discussion based upon openness and candor. The person you are coaching needs to enter self-analysis with “no thin skin.” This also applies to you as the coach. At appropriate times it would be wise to reverse roles and do an After-Action Assessment on what you are doing as the coach. Same rules apply for you.

Use the 4-question structure (We call an After-Action Review), or any other set of questions that seem to work for both you and the leader. For instance, you could use: What worked? What didn’t work? What did you learn that you will implement next time?

Some structure is necessary to ensure coherence and avoid rambling discussions that both suck up time and do not lead to any clear learning. The best After-Action Assessments follow a well-defined path. Over time this breeds comfort and acceptance. You are doing a good job when you and the leader know the questions by heart. For instance:

1) *What did we set out to do*? Agreeing on the purpose and defining success forms the basis for evaluating results.

2) *What actually happened*? This question needs to be answered in order to effectively answer the third question.

3) *Why did it happen and what insights do you gain*? The goal here is to tease out the underlying reasons for success and failure.

4) *What are you going to do moving forward*?

Frequent and timely assessments lead to quick learning and sharply increase the rate of success. Roughly 25% of the time should be devoted to the first two questions, 25-35% to the third, and 40-50% to the fourth question. Remember, the beliefs of successful people. They

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are much more interested in the future where they have control over what happens.

Your main job, as the coach, is to ensure the conversation stays on track and future focused. Your role is to keep the person you are coaching focused, establish and enforce the ground rules of openness and candor, maintain the schedule, transition from one question to the next, and summarize the resulting Action Plans. Most important, set a positive tone for the meeting.

As a general rule, you as the coach should be talking something less than 25% of the time during these assessments.

As the year unfolds, success is realized when no important action is considered truly complete until the leader you are coaching has reflected on his or her experiences and understood the reasons for success or failure. Then, learning has been institutionalized into daily work.

Learn After Doing	
BE THE ACTION PLAN CONSCIENCE	**KEY ON THE FUTURE**
• Ensure assessments take place in a timely fashion	• Keep the conversation future focused
• Make the process as easy and comfortable as possible	• Do not allow guilt, shame, or blame into discussion
• Provide reminders of key learning	• Use learning to re-plan the Action Plan

Your skill in taking a disciplined approach to capturing, digesting, and learning is crucial for the leader you are coaching. Analyzing and understanding at a deeper level what went right is necessary to ensure new behavior becomes habit. Just as useful is analyzing and understanding, at a deeper level, what went wrong. This is necessary to determine what to do differently next time. The After-Action Assessment is a powerful tool whose main benefit is speeding up the learning curve.

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are much more interested in the future where they have control over what happens.

Your main job, as the coach, is to ensure the conversation stays on track and future focused. Your role is to keep the person you are coaching focused, establish and enforce the ground rules of openness and candor, maintain the schedule, transition from one question to the next, and summarize the resulting Action Plans. Most important, set a positive tone for the meeting.

As a general rule, you as the coach should be talking something less than 25% of the time during these assessments.

As the year unfolds, success is realized when no important action is considered truly complete until the leader you are coaching has reflected on his or her experiences and understood the reasons for success or failure. Then, learning has been institutionalized into daily work.

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PERSONAL NOTES

Implement the Action Plan:

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STAKEHOLDER CENTERED COACHING®

Phase 3: Sustain Success

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STAKEHOLDER CENTERED COACHING®

Phase 3: Sustain Success

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SUSTAIN SUCCESS CHECKLIST

CHECKLIST FOR STEP 1 – Reinforce the Coaching for Behavior Change Process:

- ✓ Periodically review the “Do’s & Don’ts for Involving Stakeholders” with the leader
- ✓ Constantly look for opportunities to provide reinforcement for what the leader is working on during the engagement
- ✓ Use the process on yourself with your leader
- ✓ Use story telling as a learning tool

CHECKLIST FOR STEP 2 – Measure Progress:

- ✓ Prepare yourself and the leader for the mini-survey process
- ✓ Review the Mini-Survey results with your leader
- ✓ Help your leader prepare when, and how, to follow-up with the stakeholders
- ✓ Have your leader prepare an After-Action Assessment of the results from the Mini-Survey

CHECKLIST FOR STEP 3 – Plan the Transition:

- ✓ Prepare yourself and the leader for the final Mini-Survey at the end of the engagement
- ✓ Review the Mini-Survey results with your leader
- ✓ Help your leader prepare when, and how, to follow-up with the stakeholders for the last time
- ✓ Seek feedback & feedforward for you as a coach
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- ✓ Periodically review the "Do's & Don'ts for Involving Stakeholders" with the leader (Be the Conscience of the Process)

Your role as a behavioral coach is to act like a "personal trainer" than as the classical concept of a coach who acts like an expert dispensing wisdom. The principal role of the trainer is to ensure disciplined and consistent exercise (or practice of a leadership skill). In other words, you are the taskmaster to ensure the person is doing his or her exercises. In the realm of leadership improvement, this boils down to the seven steps of Involving Stakeholders. You are the conscience of the process.

Your desired effect with reinforcing the Stakeholder Centered Coaching® process is to make the "Do's & Don'ts" (p. 18) second nature to the person you are coaching. In a playful manner continually test the person you are coaching on his or her knowledge of the seven steps.

Your apprenticeship in using the Stakeholder Centered Coaching® process is over when you are fully familiar with and can use the 7 Step process skillfully with your Leader. Ask your leader to keep a copy available during any scheduled meeting you have. Obviously, it is also important for you to keep a copy yourself. The ability to consistently avoid the "Don'ts" and constantly implement the "Do's" from this one-page document while following up with stakeholders is how the most successful people get better.

During all meetings with the leader watch for "Do & Don't" behavior. When you catch your leader doing something right, point it out to them. Reinforce using this behavior when working with stakeholders. If, on the other hand, the person engages in one of the Don'ts, ask him or her to look over the one-page list and find the behavior they just exhibited. Help the leader by being a constructive mirror of his or her behavior.

If they fail to say "*Thank You*" for the feedback you are giving, remind him or her of this also. This one-page summary is a good coaching

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vehicle to reinforce the behavior you want this person to use conscientiously with stakeholders.

Also, remember the measures of success are on the back of the "Do's & Don't card. A leader is successful when…

… in ASKING when others see you as:
- Choosing the behavior you will improve
- Wanting to change this behavior
- Working on something important to you

…in LISTENING when others see you as:
- Wanting their input
- Paying undivided attention
- Genuinely hearing their message

…in THANKING when others see you as:
- Appreciative of the feedback/feedforward
- Taking their input seriously
- Willing to respond, once having an opportunity to reflect

…in THINKING when you see yourself:
- Not giving in to superstition or "negative" self-talk
- Doing a levelheaded cost-benefit analysis
- Committed with your decision of what to develop

…in RESPONDING when others see you as:
- Appreciative of help from all stakeholders
- Committed to improve
- Confident you will improve

….in CHANGING when others see you:
- Actively working on what you committed to improve
- Demonstrating success
- Not likely to return to your old habits

….in FOLLOWING-UP when others see you:
- Eager to gain stakeholders insight
- Actually learning from the experience
- Producing measurable results

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- ✓ Constantly look for opportunities to provide reinforcement for what the leader is working on during the engagement

A key skill of a behavioral coach is “behavioral reinforcement.” From the moment you start your coaching assignment with the leader this skill is a useful one to mold the behavior you want to see in the leader. In essence this skill is your ability to help leaders by spotting improvement and providing appropriate levels of recognition for progress in a timely, specific, and genuine manner.

One of the best ways you support the leader you are coaching is by being the best eyes and ears on what the leader is doing right and what he or she needs to be vigilant toward stopping in his or her behavior.

Provide Positive Support	
ACTIVELY SEEK DATA ON RESULTS	**ACT AS AN “ANGEL” ADVOCATE (vs. a devil’s)**
• Look for approximations of success	• Regular doses of reinforcement work best
• Focus on the matches (not mismatches) to desired effects	• Always tie to some specific action taken/result achieved
• Seek out positive news from stakeholders/others	• Encourage others to provide positive feedback

Another byproduct of our busy lives is how readily we miss the positive things going on around us. You cannot slow things down enough so that everyone (i.e., the leader and his/her stakeholders) sees the good that is happening. What you can do is pay special attention and capture positive examples that the leader is improving on his or her behavioral goal.

To remind you, many years ago Ken Blanchard, in writing The One Minute Manager, reminded us of the power of reinforcement for

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Every three months, or so, review the progress made from implementing the Action Plans built from the stakeholders' suggestions. Remind the leader of his or her successes and encourage him or her to continue adding to this success. One of your principle roles is to keep track of, and reinforce, success.

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✓ Use the process on yourself with the leader

It is important that you serve as a good role model of the process yourself. On a regular basis, go through the seven steps of the process as a reminder for yourself. Encourage feedback and feedforward on your effectiveness as a coach. Acting as a positive role model of the "Do's" is one of the best methods you can use as a coach.

Periodically, re-read sections of this Playbook to remind yourself of the principles and techniques found here. Before face-to-face meetings is a good time to skim through the relevant content. During meetings where you are not face-to-face, have the Playbook handy for reference as long as you need it.

Keep your radar open for good current examples of this process. In the press you might find an example of an interview with a sports star or coach after a victory, a business executive, a government official, or a celebrity who provides a positive example of one or more steps in the process. And you can also use quotes that are relevant and would resonate with the leader.

You can email your example to the leader you are coaching with a short note highlighting how what you sent connects to the 7-Step Involving Stakeholder Process or connects to the leadership goal the leader is working on.

One example that would fit for a leader who is working on a leadership goal of demonstrating "caring and respect," or for the step in our Stakeholder Centered Coaching® process of saying "*Thank You*" for any feedback/feedforward a leader receives from a stakeholder would be a quote attributed to Mark Twain. His keen observation was:

"*Kindness is a language that is deaf can hear and the blind can see.*"

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✓ Use Story Telling as a learning tool

Check in periodically with your network of coaches (those also using the Stakeholder Centered Coaching® Process) and ask them what they are doing to reinforce the process. Share success stories (maintaining rules of confidentiality) and lessons learned. The goal here is to be vigilant of what you, and the leader you are coaching, are doing to add to your own personal story telling cache.

This brings us to the last of our coaching skills; namely, storytelling. The ability to help leaders in their development by having a teachable point of view and the skill to convey this knowledge through a clear and compelling narrative, or anecdote, is a powerful tool in your toolkit.

One of the true gifts we have received from Marshall Goldsmith is his talent for telling stories that make the point and impacts on behavior. Many of these stories are available from his website in the form of an article only a couple of pages in length. These are free for anyone to use. Make a point to find the ones that work for you and the situations you are coaching. This website is: www.marshallgoldsmith.com

Simply click on the Free Resources tab and have fun reading. And you can also download these stories and save them in a folder of stories that you can use over, and over, again where they are relevant in your coaching.

Just as valuable, or even more valuable, will be your own stories from your own experience. As with most skills, storytelling is a learned art. We can all do it well. We can all improve as we go. Story telling is about making a point. Remember these tips on the next page:

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Make a Point	
MAKE MESSAGE OF THE STORY CLEAR	**MAKE MESSAGE OF THE STORY COMPELLING**
• Have a specific “point to the story”	• Use a grabber
• Keep your stories simple and brief enough	• Hard data > Soft data
• Tell the story so the “moral” is unambiguous	• Pull emotional strings

Never miss an opportunity to find another story to add to your repertoire. The history of the human race is the transference of wisdom through story telling. Even after the invention of the printing press, stories maintain their appeal and special place.

Stories are found in our own experiences. We also can learn the stories told by others (creative copying of stories is well practiced in the fields of coaching and leadership development).

As a coach, one of the most powerful roles you play is storyteller. It is here that you can help a leader understand something he or she needs to know in a short, yet memorable way. And this is the point. Your job is to keep certain ideas, or thoughts, conscious enough to influence the behavior of the leader you are coaching. Stories are your apparatus you use to implant the necessary wisdom.

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PERSONAL NOTES

Reinforce the Coaching for Behavior Change Process:

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SUSTAIN SUCCESS

STEP 2. Measure Progress

CHECKLIST FOR STEP 2

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The "informal" tool you used to measure progress is the monthly follow-up by the leader with stakeholders. The formal tool you use to measure progress is the *Mini-Survey*. For a yearlong coaching assignment this is conducted at approximately the five to six-month (half-way point), and eleven to twelve-month timeframes of the coaching process. The first mini is a milestone in the yearlong coaching assignment. It is the first time, since the beginning of the coaching process, that the leader's improvement has been measured in a formal anonymous way.

Steps for the Mini-Survey Process

- ✓ As the date approaches for the Mini-Survey send a message to your leader alerting them that it will be coming a about a month. Ask your leader if he, or she, wants to invite the respondents or if you should do it as the coach.

- ✓ Contact Karen Wagner at surveyonline@comcast.net to set up the survey (if you want this coaching assignment to count toward advanced/master certification). The same applies if you are using the self-administered process available in the login section of our international website: www.MGSCC.net.

- ✓ If Karen Wagner is providing this service, she will need the name of the leader and the behavioral goal the leader was working on. She will also need to know how you prefer the survey to be administered. The email asking stakeholders to complete the Mini-Survey can come from you as the coach, or the leader. It is better if it comes from someone in the organization versus surveyonline.com. **This avoids people either thinking it is spam or having it wind up in spam**.

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✓ When you receive an email from surveyonline.com with a link to the Mini-Survey this means the survey is active and respondents can take the survey. If you are sending out the invitation, the email from surveyonline.com has a sample you can modify to your style.

✓ Assuming the leader is going to invite the participants, compose a sample email and send to your leader to invite the respondents. (See Sample Draft email leader sends to stakeholders on p. 138). The invitation should include:

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- The link to the survey (copy/paste from email you received)
- When the survey needs to be completed (when the survey will become inactive)
- The leader and the leader's manager should also complete the Mini-Survey
- The key behaviors in the Action Plan the participants should think about when completing the survey

✓ Once you know the leader's email has sent, send your own email to the Stakeholders reminding them of their role in the process (see Sample: Draft email coach sends to stakeholders on pp. 138-139). Please, customize this example to fit your own style.

✓ When you receive updates as to how many respondents have completed the survey, pass this on to the leader and encourage her, or him, to ask their accountability partners to please complete the survey soon.

✓ When you receive the actual mini-survey report take some time to review the results and then send it by email to your leader. This email should include:

- The Mini-Survey Report; and the After-Action Assessment document as attachments. Put in the leader's name and leadership goal (What the leader set out to do) in the After-Action Assessment before sending (This

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document is available in the Resource Section on the stakeholdercenteredcoaching.com Coach's Portal).
- A request to discuss the results before the leader shares the results with anyone else
- Alerting the leader that the specific results in the report are confidential and the only one receiving a copy are yourself and the leader
- If anyone else is expected to receive a copy of the After-Action Assessment, such as their manager and/or the Stakeholders also let the Leader know this

✓ Meet with the leader (in person, by phone, or zoom room) and discuss the results. Use the After-Action Assessment process as the main structure for the meeting.
- *What did you set out to do*? (This is already answered by their goal)
- *What happened*? (This is partially answered with the results from the Mini-Survey report; yet, doesn't include the actions taken or not taken by the leader)
- *Why and what insights did you gain*? (This is the learning component of the review)
- *What are you going to do in the following six months*? (This is the commitment moving forward)

✓ Decide whether you, or the leader, will compose the first draft of the After-Action Assessment and agree upon a timeframe for completing. This often takes a few iterations back and forth before it is finished. It is not intended to be a long document. One, or two, pages is a common length.

✓ Finish this process by setting a positive expectation for the next six months. Conclude by asking what you can do more of, less of, or differently to help them with their Leadership Goal (your own After-Action Assessment).

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document is available in the Resource Section on the stakeholdercenteredcoaching.com Coach's Portal).
- A request to discuss the results before the leader shares the results with anyone else
- Alerting the leader that the specific results in the report are confidential and the only one receiving a copy are yourself and the leader
- If anyone else is expected to receive a copy of the After-Action Assessment, such as their manager and/or the Stakeholders also let the Leader know this

✓ Meet with the leader (in person, by phone, or zoom room) and discuss the results. Use the After-Action Assessment process as the main structure for the meeting.
- *What did you set out to do*? (This is already answered by their goal)
- *What happened*? (This is partially answered with the results from the Mini-Survey report; yet, doesn't include the actions taken or not taken by the leader)
- *Why and what insights did you gain*? (This is the learning component of the review)
- *What are you going to do in the following six months*? (This is the commitment moving forward)

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EXAMPLE: Draft email leader sends to stakeholders for Mini-Survey

Dear Colleagues:

In the upcoming weeks I would like you to look for an invitation to complete a very short online survey regarding my actions on my developmental goal of (fill in the blank). This survey will take only a few minutes to complete and is especially important to me.

Hopefully, you can take 5 minutes to complete this brief survey. The survey will come from J.K.Wagner@surveyonline.com *If you do not receive the message, please check your JUNK file. The survey will be active for one week.*

As a reminder, I am asking two things of you. First, focus your evaluation on my behavior over the past 5 to 6 months. Second, be honest with your responses. I value this feedback and thank you for taking the time to complete the survey.

EXAMPLE: Draft email coach sends to stakeholders for Mini-Survey

Greetings Stakeholders for (fill in leader's name),

Thank you for your active participation over these past months as a Stakeholder with fill in leader's name). It is now time to complete a mini-survey to provide him with a measurement of his progress toward his goal of "(fill in Leadership Goal)." As (fill in leader's first name) is continuing to work on his Leadership Goal, this is a good time receive some anonymous feedback and suggestions for moving forward.

The process is quite simple. Click on this link that will take you to the survey.

(Cut and Paste the link to the mini-survey if you are the one providing the link for the survey.) [If surveyonline.com is sending out the email then change the above sentence to read: The process

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It should only take you a few minutes to complete; and, is of great value to (fill in the leader's first name). With the exception of his, or her, manager all your responses will be anonymous and combined with others to maintain confidentiality. Please complete the survey right away this week.

Before you complete the mini, I want to remind you how a stakeholder plays his, or her, role effectively:

- *Commit to be fair and honest. It does not help a leader to receive either false praise, or false criticism about their efforts to improve. It does help to get accurate and appropriate reinforcement for what the leader did and did not do.*

- *Help the leader by being positive and supportive – not cynical, negative or sarcastic. If Stakeholders are positive and supportive of the leader's efforts to change, the leader will be much more likely to continue the process.*

If you would like to speak directly with me to provide any feedback and suggestions to (fill in leader's first name) simply reply to this email and let me know. We can schedule a time to speak. Again, thank you for your active participation

In clarifying the mini-survey process with your leader explain that the mini-survey process is a critical formal step in measuring the progress made by the leader. This is validation for the leader and the stakeholders that the leader has succeeded in improving in the specified area of development.

This may not be necessary, yet it can be helpful to have an example of what a Mini-Survey looks like. Some leaders like to "see" what it is their stakeholders will be completing. Here is an example on the following page:

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EXAMPLE: What a Mini-Survey Looks Like

Do you believe this person has become more (or less) effective *in the past six months* on the following items? Please check the number that best matches your estimate of any change in effectiveness. (-3 = Less Effective; 0 = No Change; 3 = More Effective; NI = Not Enough Information to Evaluate)

How effectively has this leader…?	**-3**	**-2**	**-1**	**0**	**+1**	**+2**	**+3**
Clearly defined roles and responsibilities before delegating tasks					**1**	**3**	**2**
Become a more (or less) effective leader in the past 12 months?					**2**	**3**	**1**

What has this individual done to become more effective?

- *Has added more structure to staff meetings.*
- *He does communicate information more effectively.*
- *Chris has held more frequent meetings with his direct reports. He has shared information more freely and kept us apprised of events affecting the company and department.*
- *Meetings have been bettering organized and more focused.*
- *It seems that Chris has made an effort to be more organized. He delegates better.*

What can this individual do to become a more effective leader?

- *More involvement with processes…Regular staff meetings that have specific agendas.*
- *Performance expectations are not as well defined as they should be. This is largely due to the nature of the job, but Chris needs to take the lead in this area.*
- *Keep directors and managers up to date on circumstances involving the staff – it seems as if most everyone is in the dark regarding situations that would affect the entire department. Need some straight talk.*

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How effectively has this leader…? -3 -2 -1 0 +1 +2 +3
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If you are contacted because some stakeholders have not completed the Mini-Survey, immediately contact your leader and have him or her, reconnect with the stakeholders to remind them of the importance to complete their survey. Sometimes stakeholders are very responsive in completing the Mini-Survey. Other times, even though completing the survey takes almost no time, stakeholders do not complete the survey after the first request.

When mini-survey reports are run leaders are always disappointed if even one of the stakeholders does not complete the survey. Play your part to ensure your leader is not disappointed.

Using one of the Mini-Survey tools we provide to our coaches are the only two services that can count toward you working for “Advanced” or “Master” level certifications. With six successful coaching engagements of at least six months in duration with a combined score of +1 or above, a coach achieves Advanced Certification. Then, with another six, or a total of 12 successful coaching engagements, a coach reaches the level of Master Certified Coach.

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✓ Review the Mini-Survey results with your leader

Once you receive your report, set up a time to discuss the results and next steps with the leader. Treat this process with the same care as the initial 360º Report. How the leader responds to this feedback is critical to the next phase of development. Prepare for the mini-survey results review with your leader by taking the needed time to study the report.

In the discussion be sure the leader looks at the whole picture, the good news and any disappointing news (assuming the results are lower than the leader had hoped for). In many cases the results from the first mini are disappointing.

When the results are disappointing to the leader, this usually serves as a wakeup call for a leader who has not been genuinely following the process. The power of "hard numbers" is often the incentive needed for a leader to put out the effort to consistently apply the 7-Step process (page 18 in this Playbook).

Watch how your leader responds to the feedback during your discussion of the results; it is a signal of how well he or she has internalized the "Do's & Don'ts" associated with the process. Point out examples of the Don'ts if the leader engages in any inappropriate actions. More importantly, reinforce examples of the Do's as evidence that the leader has internalized these actions. Be sure to point out that this behavior is needed with stakeholders more than with you as her or his coach.

Use this "half-way" checkpoint to challenge the leader to strive for a "+3" (or whatever goal was set at the beginning of the coaching assignment) at the twelve-month mark. Make the point that it is how things end that is most important, not how one is perceived in the middle.

During this meeting, remind your leader the most useful tool you have to measure progress is the monthly informal follow-up with the stakeholders. This is far more personal and meaningful to stakeholders and the leader. The mini-survey process does not replace this practice.

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- ✓ Help your leader prepare when, and how, to follow-up with the stakeholders

Walk the leader through what to communicate back to the stakeholders. The most common method is a "thank you" email. This can be done personally instead of by email if the leader so desires.

SAMPLE: "Thank You" email leader sends to stakeholders

Dear Stakeholders:

*I recently received the results from the first mini survey. I was encouraged by your written comments and your ratings of my effectiveness in **[fill in the Leadership Goal(s)]***

Thank you for your assistance and commitment to: observe my progress on executing my Action Plan; point out where I have improved; and, what I should continue to focus on. Your willingness to provide me this input is very valuable.

*I will continue to ask you if you have noticed a difference in my behavior as I continue to **[fill in the Leadership Goal(s)]**. I will also ask you for ongoing suggestions for improvement. Finally, do not simply wait for me to ask you. Be proactive with your feedback and your suggestions.*

I am aware that my progress could slip. It is to that end that I ask you to continue to remain equally committed as my Stakeholder. It is very important to me that you continue to observe my efforts and comment on what you notice.

Thank you,

On the next page is a summary of involving Stakeholders. It is beneficial here to remind the leader the role stakeholders play in the overall success of this process.

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INVOLVING STAKEHOLDERS

It is important for you to…

UNDERSTAND:

The importance of turning stakeholders into your personal coaches

DO NOT:

- Stick with your fan club
- Expect instant help
- Take up too much of stakeholders' time

DO:

- Include as many as you can
- Keep the process upbeat
- Vary involvement as needed

MEASURE SUCCESS:

You have been successful in INVOLVING when others feel they:

- Contributed to your development
- Have been acknowledged for helping
- Want to continue helping

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UNDERSTAND: (What leader needs to Understand)

What is the value of turning your stakeholders into internal coaches? Which scenario offers more value to the perception by your stakeholders that your behavior is changing: A) you could read a book, or hire a coach and implement some learning from that endeavor; or, B) implement a suggestion from one of your stakeholders? The answer is clearly B. Let's illustrate with an example. Who is the best person to give advice on how you can listen better? The obvious answer is the person with whom you are listening. No outside source could ever know as much about how to succeed in listening than your stakeholder who has to experience your listening, or perceived non-listening. Additionally, it is much easier to see results and feel good about witnessing a suggestion implemented if you were the person giving it. Give your stakeholders this opportunity.

The bottom line is: GIVE YOUR STAKEHOLDERS A STAKE.

WHILE INVOLVING - DO NOT:

- Stick with your fan club
- Expect instant help
- Take up too much of stakeholders' time

Stick with your fan club – We have a tendency to invite least those whom we need to invite most. It may be safe and convenient to limit involvement to those you have a good relationship with and to those whose insights you value. This is not the most effective approach. Those with whom you are having difficulty are also valuable to you because their insights are different. Involving those with whom you have strained, or distant, relationships may also open the door for more, and better, communication and relationships. Include both types of people as stakeholders.

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Expect instant help – When you involve people, do not expect them to have useful feedback or suggestions the first time you ask. Maybe not even the second, or the third, time you ask. Do not give up on any stakeholder. Continue to involve them by asking for feedback and suggestions on a monthly basis. Also, keep going to those who give lots of feedback and suggestions that are not of much value. At some point you will be surprised with a valuable insight they provide.

Take up too much of stakeholders' time – You are not being successful if you come across as *needy* or *high maintenance*. Do not suck up a lot of time from those you have recruited as stakeholders. It is very clear you are asking them to invest in you. Respect their time and busy lives. Keep your requests simple and easy to complete. Your monthly follow-up should not take more than a few minutes.

You are doing a good job of INVOLVING others when your stakeholders/internal coaches react to your requests in a positive way. Check to ensure the involvement you are requesting is neither inconvenient nor ill timed.

WHILE INVOLVING - DO:

- Include as many as you can
- Keep the process upbeat
- Vary involvement as needed

Include as many as you can – Cast as wide a net as you can manage. Those appropriate to invite are those who observe your behavior with enough frequency to provide useful feedback/forward and have a stake in the effectiveness of your actions. Those you have a strained relationship with, or those whose opinion you find of little value, are the real tests of your commitment and resolve. Remember, courage is a key part of this process. The idea here is to multiply your insight through the eyes of others.

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Keep the process upbeat – Whenever you meet with your stakeholders, enter the conversation in a cheerful and energized manner. The topic is a personal favorite…*You*. The specific topic of conversation is a leadership behavior you have the genuine desire to develop. Maintain your enthusiasm during the process to demonstrate your interest in getting even better than you are now. Remember that fundamentally this is about the future, not the past.

Vary your involvement as needed – Most often your best approach to involvement is face time. Short, 5-minute or less, one-on-ones are the most personal way to involve your stakeholders. Given meetings, travel and geography, mobile phones and email are also useful means to keep the momentum and pace of involvement steady. Stakeholders may be more comfortable with one form of communication over another. Make sure you keep some "high touch" to the process. At best, these conversations occur during the natural course of the business day.

MEASURE SUCCESS:

You have been successful in INVOLVING when stakeholders feel they:

- Contributed to your development
- Have been acknowledged for helping
- Want to continue helping

Most people are helpful by nature. This means they gain personal satisfaction from helping. Give your stakeholders specific reasons to continue involvement in your development. Keep the process upbeat and energizing for them too. This happens when they genuinely feel good about helping you. Use their advice and be generous with recognizing their contribution to your successes.

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- ✓ Have your leader prepare an After-Action Assessment from the results of the Mini-Survey

After completing the follow-up discussion of the mini-survey results transition to the second task for the leader besides thanking the stakeholders. This second task is the After-Action Assessment. Provide an example of an After-Action Assessment so the leader has a visual understanding of what she, or he, is being asked to complete. [a Sample is included below]

Point out to the leader that this is a perfect opportunity to tell his, or her, own story. It not only a useful exercise to foster learning for the leader. It is also a great way to promote what the leader has spent time and energy to achieve. In many of our clients the After-Action Assessment is shared with the leader's manager and others. This is not a requirement, yet it is a practice we find adds value.

For one thing, when leaders know their self-diagnosis in the form of an After-Action Assessment is being shared with their manager, they often do a more thoughtful and thorough job. One of Marshall Goldsmith's consistent suggestions to leaders is to improve in their self-promotion and subsequent reputation. He covers this in depth in his book titled <u>Mojo</u>.

Besides the discipline of using the 7-Step Involving Stakeholder Process, the disciplined "learning after doing" is a second process we feel is at the core of the value we provide with Stakeholder Centered Coaching®.

SAMPLE: After-Action Assessment by a Senior Director of Quality

1) What did I set out to do?

The 360 feedback came in from 3 populations. 1). My reports, 2). My colleagues in other functions, Business Groups and Corporate. 3). My peers on the xxxx Staff. The feedback from my peers on the staff was less complimentary than the other populations. Working with my

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coach we felt that the difference was significant enough to focus only on the feedback from the staff. I chose as my development focus to improve my collaboration with my peers on the staff.

2) What happened?

I met 1 on 1 with each of the staff members and attended several of their staff meetings this was a two-way communication of me sharing what I thought I did, and what the Quality Function does. I collected feedback on what they required from me and the Quality Team.

What I realized after these meeting was that I would need to be more proactive and aggressive in providing help to the Staff members and their teams. While there were many unmet needs where I could add a lot of value I was not the first person that they thought of when the time came to look for help.

I think that I have improved the visibility of myself and the Quality Team with the GM's. I am working very closely with "X" and his team I am attending xxx and xx meetings regularly and I am able to provide a lot a valuable actionable feedback to the team. Plus, I took over the management of one project in the summer to give "X" and his team greater bandwidth and that has worked out very well. With xxx I have worked very closely with "Y" and have built a much better relationship with "Z".

I am still struggling to make progress with "A" but I am scheduled to attend one of his staff meetings in Q1 and he has shared with me ideas of how I can add greater value to him and his team. The Program Office work gave me a great opportunity to build greater collaboration, I worked with all of the GM's and their staffs on the metrics this gave me greater visibility and a chance to use some of my skills with the GM's and their teams.

I gave a lot of coaching to "B", "C" and their teams on leading metrics and metrics in general. I also worked with "B" on a personal development issue for his quality manager and shared my process of collecting 360 feedback for xxx's which he then leveraged. I have also consciously tried to more vociferous in staff meetings and give my opinion more readily where I think a contribution will add value.

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3) Why did it happen?

I am more aware of the need to be proactive and visible. My peers are more aware of how the quality team in general, and I in particular can add value. I think that I have made the biggest impact on "X" and his team because they needed help and were the most ready to accept help.

4) What would I do next time?

I have changed my attitude to working with my peers and will continue to be more proactive in my interaction with them. I am becoming quite heavily involved in xxx and I can see myself working very closely with the Proteomics manager once s/he is on board.

The Mini-Survey Report, along with a well written After-Action Assessment serves as an overall summary covering the halfway point (and the end point) of the leader working to become a better leader.

The results of the Mini-Survey provide a documented record that this leader has the ability to learn new skills. It becomes the leader's story of working on his, or her, leadership. This is a very valuable summary for the leader in the future.

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PERSONAL NOTES

Measure Progress:

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PERSONAL NOTES

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SUSTAIN SUCCESS

STEP 3. Plan the Transition

CHECKLIST FOR STEP 3

- ✓ Prepare yourself and the leader for the final Mini-Survey process at the end of the engagement
- ✓ Review the Mini-Survey results with your leader
- ✓ Help your leader prepare when, and how, to follow-up with the stakeholders for the last time
- ✓ Seek feedback & feedforward for you as a coach
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✓ Prepare yourself and the leader for the final Mini-Survey process at the end of the engagement

There are three major phases in your coaching assignment. The first is the "Start Smart" process. Here is where you first meet with your leader and begin the coaching assignment. The second is the first Mini-Survey halfway through the year. At this point hard evidence of stakeholder perceptions is collected and reviewed, showing the results based upon the efforts by the leader up to that point. The third transition point is the final Mini-Survey results at the conclusion of the assignment. Here is where your active coaching ends. Planning how to end things is as important as planning how to start.

Prepare your leader and the Vendor supplying the second Mini Survey in the same manner as the first mini. Use the same checklist (on p. 135 of the Playbook) for the steps to take. Start this roughly a month before the actual data will be collected. Remind your leader that this second mini is an important conclusion to the process. Along with the first mini, it will validate what he or she has achieved over the past 12 months. Again, if needed, help your leader prepare a short email to alert the stakeholders of this upcoming task.

EXAMPLE: Email to Stakeholders re 2nd Mini-Survey

Dear Colleagues:

*In the upcoming weeks I would like you to look for an invitation to complete a second online Mini-Survey reviewing my actions on my developmental goal of (*fill in the blank*). Similar to the survey you completed six months ago, this will take only a few minutes to complete and is especially important to me.*

As a reminder, I am asking two things of you. First, focus your evaluation on my behavior over the past year. Second, be honest with your responses. I value this feedback and thank you for taking the time to complete the survey.

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✓ Review the Mini-Survey Results with your Leader

Once you know when the report will be sent, you and the leader set up a time immediately following this date to discuss the results and the lessons to take forward into the future. Block enough time to thoroughly debrief the report and to discuss the learning that has taken place during the entire year.

In sending the mini-survey report to the leader, you may want to send it with a cover letter with information like the following:

Mini-Survey Cover Letter

The mini-survey report marks a pivotal point in your leadership journey—a measurement of progress on your goal. This report validates your improvement and gauges the degree that your stakeholders recognize it. Hopefully, the results both encourage and challenge you to continue becoming an even better leader.
From the start, we've talked about two kinds of desired changes: 1) strengthening of important leadership behavior, and 2) recognition by others of it. Both changes are driven by *follow-up*.

Lastly, you will use this report to write your After-Action Assessment—a short review that includes your goal, outcome, learning, what you plan to do going forward. Consider the After-Action Assessment a capstone to your coaching experience, and the mini survey report its key evidence.

Once you've read the report, we will debrief it. Our conversation will help you frame up the conversation you'll have with your boss.

(As always, our advice is to put your cover letter in your own words.)

Start the review meeting by asking for the leader's level of satisfaction with the results. Reinforce the positive results from the report. If there are negative (or lower than anticipated) results, again ask the leader for his or her analysis before contributing your thoughts on the results.

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Try to have the bulk of the meeting focus on overall learning and what the leader will take forward into the future. Have the leader provide personal FeedForward to himself/herself for the upcoming year. Be a cheerleader for the 7-Step process and what has been learned from the experiences. Reinforce the notion that the leader is now ready to implement the process on his, or her, own as what was a new habit and discipline at the start of the coaching is now learned habits and discipline.

In summarizing the “personal trainer” side of your coaching, you want the person to continue the discipline you have helped instill over the year. In other words, you are suggesting they are ready to “work out on his or her own” moving forward. The following analogy might be useful:

> Do you know the term "Sarcopenia?" It is a fancy term used by The National Institute of Aging to describe a universal human experience; namely, muscles becoming smaller and weaker as people age. This typically starts in the 30's and 40's and the progression is slowly downhill, becoming evident in the 60's and 70's.
>
> Average 30-year-olds can expect to lose 25% of muscle mass and strength by age 70 and another 25% by age 90. That is the bad news. The good news is it is not inevitable. **As Hippocrates said: *"That which is used develops; that which is not used wastes away."*** Light resistance training can greatly reduce the above statistics.
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> The important lesson here is "very light doses of feedback/FeedForward, done regularly" will keep us from losing leadership strength. Over the upcoming year, exercise your "asking for feedback/feedforward" muscles.

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- ✓ Help your leader prepare when, and how, to follow-up with the stakeholders for the last time

Remind your leader to close the loop with all stakeholders, thanking them for their key contributions in helping you (the leader) become more effective in the chosen behavior(s) over the past year. Suggest they do this in person to signify his or her sincerity and genuine appreciation. This is an important task to perform. Be willing to rehearse this message with your leader. If geography is an issue this can be done over the phone, and if necessary by email.

EXAMPLE: **Final Message to Stakeholders**

> *Colleagues,*
>
> *I want to thank you for all the contributions you have made over the past year toward my improvement in "X." In the beginning of the year, I said this was important to me and it was.*
>
> *The improvement I have made means a lot to me. Most of the credit belongs to you and the other stakeholders. Without your feedback, suggestions and support, my improvement would not have been as good as it was.* (If a stakeholder had provided a critical suggestion, point this out to the stakeholder).
>
> *I am not closing the book on my efforts to continuously improve. I am going to stop asking you formally for help in this area. If you ever have any feedback or suggestions on "X" I welcome your thoughts. Thank you again for contributing significantly to my success.*

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✓ Seek feedback & feedforward on you as a coach

When you turn the agenda of the meeting to yourself as a coach, be appreciative of any positive feedback you receive and be objectively receptive of any shortcomings. For example, if you were not hard enough on your leader at times to fulfill his or her action steps then use this opportunity to learn how to improve in this area before your next coaching assignment.

Ask: What did I do well; what was helpful; and, what could I do better in the future? As always, be a good role model yourself of the 7-Step Involving Stakeholders and the "Do's/Don'ts" associated with these steps. Thank the leader for the opportunity to work on such an important issue as his or her leadership development over the past year.

Questions you could employ include:

- *What suggestions do you have for me to be a better coach for you?*
- *How could I have done a better job of helping you succeed on your goal?*
- *What have I done that has been useful to you?*

Overall, this meeting is a time to celebrate success. Thank the person for his or her ongoing willingness over the past year to work with you during the year and, more importantly, to take the process seriously. Focus on the positives that have occurred during the yearlong assignment.

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- ✓ Have your Leader prepare a final After-Action Assessment of the results from the Mini-Survey

Your leader has already completed one After-Action Assessment right after the first mini-survey results came in. Now is the time to reflect on the entire process over the timeframe of the coaching engagement. Task your leader to do this final assessment. Make the following points in giving this assignment. The purpose of the assignment is to ensure:

1. You have a complete documented "story" of your success
2. You do not revert to old practices and the change becomes permanent
3. You are ready to move forward and continue the process on your own

Agree with the leader when you will receive a first draft of their final After-Action Assessment. And send them the template to complete this self-assessment. During the interim capture the learning your leader describes during this meeting and write up your own recollection of what the leader did during the engagement. Once you receive the leader's draft, add what is missing from your own write-up and send it back to the leader.

Write your final email in your own words congratulating the leader on all that was accomplished. Remind the leader that the mini-survey report, along with the written After-Action Assessment are the story of the leader's improvement. This story is worth keeping and sending out to all those involved with this coaching. This would include, the stakeholders, especially the leader's manager, and any sponsor who was involved.

Also highlight the learning you had as a coach and your appreciation of having the opportunity to help the leader with this important task.

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PERSONAL NOTES

Sustain Success:

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PERSONAL NOTES

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CERTIFIED COACH RESOURCES

For our certified coaches there are three key areas where you have special access to materials that will help you with your Stakeholder Centered Coaching®.

As a certified coach in the U.S. you will have access to the Resource Section found on the Certification page on our website.

http://www.stakeholdercenteredcoaching.com/

Simply go to the website, click on the Coach Certification tab and scroll down to the bottom of the page where you will see a box titled – 8. Resources for Certified Coaches. Then, click on this box.

Once you have the Password write it here:

____

The second area where you will have resources available is on our Coach Portal.

https://get.MGSCC.net/portal

Scroll down to the bottom of the main page where you will see "Coach Login," and click on the link. There you will type in your Username and Password (which you will create the first time you log into the site).

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The final resource you will have is a comprehensive guide to the material found in the Coach's Playbook that was organized and developed by our Master Certified Coach Emily Chipman.

What Emily has done is create a system for you to use that will simplify and keep you, and the leader you are coaching, organized as you implement Stakeholder Centered Coaching®.

What you received with this resource is a digital and hard copy of The Workflow Manual & Management Tools. As with the Playbook, this will be updated approximately every two years as we continue to enhance our support for our coaches.

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echipman@rusmanconsulting.com

(317) 696-7511

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Appendix

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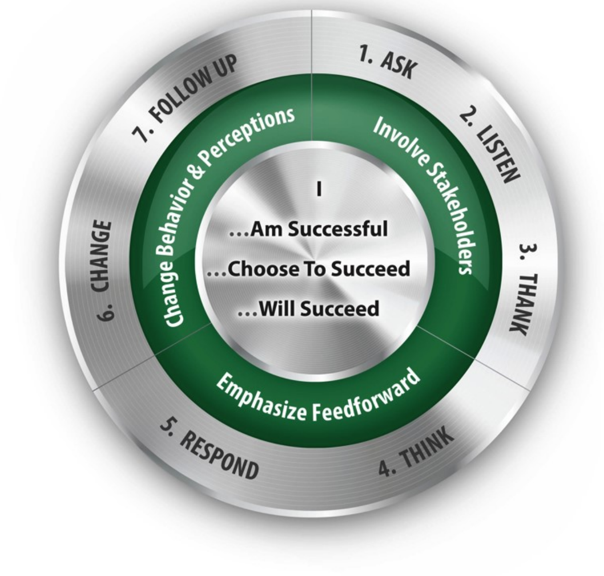
INVOLVING STAKEHOLDERS

THE SKILLS FOR INVOLVING STAKEHOLDERS



If you want to be more limber it is useful to do some stretching. If you want to be stronger, it is useful to lift some weights. If you want to have more endurance, it is useful to engage in cardiovascular exercise. If you want to improve as a leader, follow the seven steps in the Involving Stakeholder Process.

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INVOLVING STAKEHOLDERS

THE SKILLS FOR INVOLVING STAKEHOLDERS

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INVOLVING STAKEHOLDERS

It is important for you to…

UNDERSTAND:

The importance of turning stakeholders into your personal coaches

DO NOT:

- Stick with your fan club
- Expect instant help
- Take up too much of stakeholders' time

DO:

- Include as many as you can
- Keep the process upbeat
- Vary involvement as needed

MEASURE SUCCESS:

You have been successful in INVOLVING when others feel they:

- Contributed to your development
- Have been acknowledged for helping
- Want to continue helping

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Reviewing Skills for Involving Stakeholders

ASK

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Reviewing Skills for Involving Stakeholders

ASK

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Step 1: ASK

It is important for you to…

UNDERSTAND:

How difficult it can be to ask

DO NOT:

- Wait for a "better time" to ask
- Act skeptical or doubtful
- Put yourself down

DO:

- Be Concise
- Be Specific
- Be Positive

MEASURE SUCCESS:

You have been successful in ASKING when others see you as:

- Choosing the behavior you want to improve
- Improving a behavior important to you
- Confident that you will improve

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UNDERSTAND:

Why don't we ask for feedback more often? The number one reason is: We are afraid of what we are going to hear, whether we know what we're going to hear or not. Examples: delaying going for a physical check-up with your doctor; postponing going to the dentist for a routine cleaning; and, waiting to ask for feedback regarding how we are doing as leaders.

Bottom line: ASKING FOR FEEDBACK TAKES COURAGE.

WHILE ASKING - DO NOT:

- Wait for a "better time"
- Act skeptical or doubtful
- Put yourself down

Wait for a "better time" – The longer you wait for feedback or suggestions, the longer it will be before you are demonstrating to yourself and others you are committed to improving. We often live in a fantasy that goes something like this: "Tomorrow will be a much better time for me to ask and for them to respond. We're all busy now. I'll be much more comfortable in a few days. They will be much more receptive later." As the old saying goes, "*death by delay*". The circumstances that are causing the procrastination are not likely to change anytime soon. The time to ask is when you have the first opportunity.

Act skeptical or doubtful - Do not fold your arms and ask: "*Do you think I have a problem with…* (fill in the blank)?" Especially be careful of asking this with a direct report. This will probably dictate a less than honest response. Do not come across as fishing for a compliment by saying something like: "*I guess I should work on…What do you think*?"

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UNDERSTAND:

Why don't we ask for feedback more often? The number one reason is: We are afraid of what we are going to hear, whether we know what we're going to hear or not. Examples: delaying going for a physical check-up with your doctor; postponing going to the dentist for a routine cleaning; and, waiting to ask for feedback regarding how we are doing as leaders.

Bottom line: ASKING FOR FEEDBACK TAKES COURAGE.

WHILE ASKING - DO NOT:

- Wait for a "better time"
- Act skeptical or doubtful
- Put yourself down

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Put yourself down - Do not say you have a problem, i.e., "*I have a problem with listening without interrupting*." Instead of saying things like: "*I'm horrible at listening*," or "*I stink at listening*," it is much better to say: "*I want to get better at*…(for instance, *listening without interrupting*)."

You are doing a good job of ASKING when stakeholders cannot tell whether the behavior about which you are asking is a weakness or a strength you want to improve.

WHILE ASKING - DO:

- Be concise
- Be specific
- Be positive

Be concise – Spend two minutes or less when asking for feedback. Use word economy. This is not the time to get long winded. Especially when nervous, a lot of people compensate by doing a lot of talking. Get to the point.

Be specific – Make it perfectly clear about what it is you are seeking feedback or suggestions. The person you are asking should be able to easily state what you are asking them to respond to in terms of their input. The more bounded and focused the request, the easier it is for your stakeholders to provide feedback (and suggestions).

Be positive – Come across as both enthusiastic about the process of improvement and your desire to focus on the future, not the past. Do this by showing your appreciation for feedback you have received to date and your desire to gain suggestions for improving in the future.

EXAMPLE: "*I received a lot of feedback in my 360º Report. I appreciate getting this kind of feedback. It is a great opportunity to learn. I got a lot of positive feedback on* (…name a couple of things) *and received some feedback on what I can improve. What I want to work on is* (…fill in the specific leadership behavior you want to improve). *Would you be willing to give me some suggestions for improvement in this area?*"

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MEASURE SUCCESS:

You have been successful in ASKING when stakeholders see you as:

- Personally choosing the behavior you want to improve
- The behavior you have chosen is important to you
- Confident that you will improve

Successful people have a tendency to take on too much with the mistaken belief they can maintain their focused attention. When it comes to behavioral change, less is definitely more. Changing behavior is very difficult. It takes a lot of effort over time to create new habit patterns. In fact, many stakeholders will be cautious at best in their prediction that actual positive change will occur at all.

FOOTNOTE:

In some cultures, it may be difficult to *ask* due to the perception of authority and what is proper given the relationship. Often a person of higher authority has a responsibility not to put a person of lower authority in an uncomfortable position. Setting the context is vitally important to do here.

If any of this applies to you, set the stage for asking by communicating why the feedback/FeedForward is good for the organization; it is good for your role; and it is good for you personally.

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Reviewing Skills for Involving Stakeholders

ASK

LISTEN

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Reviewing Skills for Involving Stakeholders

ASK

LISTEN

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Step 2: LISTEN

It is important for you to…

UNDERSTAND:

Listening is expected after asking

DO NOT:

- Use “No,” “But,” or “However”
- Make excuses
- Exhibit impatience or anger

DO:

- Pay undivided attention
- Capture what is said
- Clarify/Confirm what you heard

MEASURE SUCCESS:

You have been successful in LISTENING when others see you as:

- Wanting their input
- Paying undivided attention
- Genuinely hearing their message

171

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UNDERSTAND:

When you ASK for feedback or FeedForward (suggestions) an expectation has been set with the other person that you will listen. Because the human brain is capable of processing significantly faster than anyone can speak, we are all in danger of multi-tasking in ways that interfere with our listening. When ASKING we need to prepare ourselves to ensure this step is an overwhelming success. The most important thing about listening is *not doing things* that will interfere with the process.

WHILE LISTENING - DO NOT:

- Use “No,” “But,” or “However”
- Make excuses
- Exhibit impatience or anger

Use “No,” “But,” or “However” - Marshall Goldsmith confronted a COO who was being groomed for the CEO job. Marshall said it would be $20 every time this gentleman said “No, But, or However.” After the first “But” Marshall said: “First time it’s free.” The guy said: “But.” “$20.” “No.” “$20 equals $40.” “No, No, No.” “$20, $20, $20 equals $100.” The guy spent $420 in one hour and a half. At the end, to his credit the guy said: “*I did this 21 times when you brought it to my attention. I wonder how many times I say this under normal circumstances*?” Saying “no,” “but,” or “however” is fine in some circumstances, it just isn’t appropriate when we have just asked for feedback about ourselves. It comes across as defensive and disagreeing with the other person’s perception.

Make excuses - No one, to our knowledge, who gave another person feedback and then heard excuses as a reply has said: “*I really didn’t think I was wrong with my feedback. What really turned around my thinking was the quality of your* excuses.” Excuses are seen for what they are, defensiveness whose only purpose is to protect a person from the truth. Likewise, no one has ever been thought of as a great leader because of the quality of his or her excuses.

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Exhibit impatience or anger - Do not come across as edgy and wanting the feedback (or FeedForward) over with. Getting irritated with the person is also not a good idea. If you only have a short time for the conversation before you have to leave, let the person know before they start speaking. Your eagerness should be to listen, not to end the conversation. Anger, as a reaction, is even worse. DO NOT speak when you are angry or have lost control of your behavior. "Shooting the messenger" is possibly the most damaging thing you can do to short circuit the Stakeholder Centered process. What are you generally thinking about when you respond with anger? Often it is your own ego. Sit on it, don't let it rear its ugly head.

WHILE LISTENING - DO:

- Pay undivided attention
- Capture what is said
- Clarify/Confirm what you heard

Pay undivided attention – Provide yourself with a setting conducive to listening. To the best of your ability orchestrate the timing to coincide with minimal distractions or time pressures. If you only have a few minutes, let the person know ahead of time how long you have. In fact, the goal is to spend no more than 5 minutes, or so, in this conversation anyway. Listen with your mind and your body. Give physical evidence that you are focused on what the other person is saying.

Capture what is said – Bring paper and something to write with when soliciting feedback. A laptop is perfectly acceptable if that is more your style. If you listen better by looking directly at the person while he or she is speaking, then write your notes after they have finished speaking. If you listen better by making yourself write it down while they are speaking, then be sure to write while listening. Your goal should be to capture the message the person is giving you.

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Clarify/Confirm what you heard – When the person is finished recap what you heard. Start by saying something like: "*Let me be sure I captured your feedback* (or suggestion)." Then, in your own words, summarize the points made to you. Your goal is to provide a proof-point to the person that you captured their input. You can end by saying something like: "*Did I miss anything*?" If they feel you did, ask them to fill in what you missed. Repeat until your stakeholder is satisfied.

MEASURE SUCCESS:

You have been successful in LISTENING when stakeholders see you as:

- Wanting their input
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Being put in the situation of being asked to give someone feedback is often difficult and uncomfortable. You may have to re-condition people to put them at ease with providing feedback or FeedForward (suggestions for the future). Do this by asking for very specific feedback. This is much easier to provide than a more general, encompassing request like: "*How am I doing as a leader*?" You are successful to the point that you are seen as actually listening and taking the feedback constructively.

FOOTNOTE:

You also want to ensure that you are listening with your body, not just your mind. For instance, if you are tall, you might want to sit down to listen. Listening is done best from common ground. The goal in the body language of listening is to eliminate those things that get between the listener and the person speaking.

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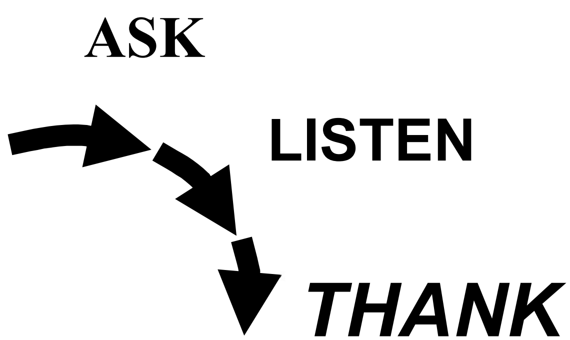

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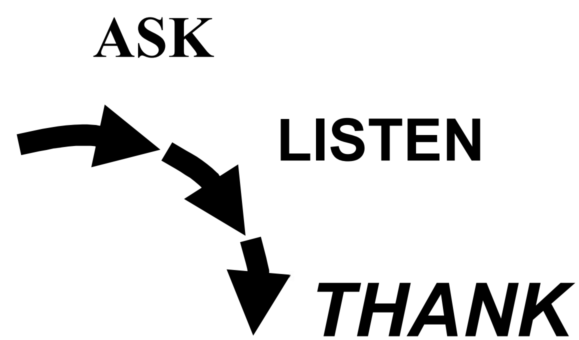

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Step 3: THANK

It is important for you to…

UNDERSTAND:

The value of saying "Thank You"

DO NOT:

- Use a dejected tone
- Act artificial
- Be insincere

DO:

- Say "Thank You" quickly
- Use first name (unless inappropriate)
- Be genuine

MEASURE SUCCESS:

You have been successful in THANKING when others see you as:

- Appreciative of the feedback/FeedForward
- Taking their input seriously
- Willing to respond to the input, once having an opportunity to reflect

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UNDERSTAND:

What are the reasons for saying: "Thank You, Jane"?

- You asked for it
- When the feedback is honest it is a genuine *gift* no matter what its content or accuracy. What is the most appropriate way to respond to a gift? With your appreciation!
- You want to reinforce the feedback process (which can be difficult for your stakeholders to do)

The bottom line is: THIS STEP IS BASIC ETTIQUITE.

WHILE THANKING - DO NOT:

- Use a dejected tone
- Act artificial
- Be insincere

Use a dejected tone – Your tone of voice is heard much more than the words when it comes to a "Thank you, Joe." If the feedback you are getting is negative and unfortunately on target/true, a natural tendency is to feel somewhat deflated. Also, if a suggestion for the future is going to be difficult to do, a natural tendency is to feel overwhelmed. However, it is important the words that come out of your mouth be sincere instead of sounding downhearted.

Act artificial – One of the worst things you can do is come across as being coached to say thank you. About the only thing worse is to actually say: "*I was coached to say Thank You to you*." Saying "Thank You" may feel foreign to you if you are not used to doing it. If that is the case, practice using those two important words until they become natural.

Be insincere – If you find yourself faking it, STOP. You are not a good enough actor. A disingenuous "Thank you, Mary" serves no useful purpose if your goal is to involve Mary in your ongoing development. Such behavior only achieves the opposite. The person does not want to help you.

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What are the reasons for saying: "Thank You, Jane"?

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You are doing a good job of THANKING when the stakeholder cannot distinguish between a "Thank you" for something difficult or easy for you to do, accurate or off the mark, a positive reinforcement or a criticism. No matter what the stakeholder says, they should feel your actual appreciation.

WHILE THANKING - DO:

- Say "Thank You" quickly
- Use first name (unless inappropriate)
- Be Genuine

Say "Thank You" quickly – The two most respectful words you can give to someone who is trying to help you is "Thank You." Avoid taking a long time to say these words. The primary reason for saying thank you is to reinforce the person's willingness to provide feedback or suggestions, rather than to thank them for the content of what they just said. The longer you wait, the more it may come across that you are processing and then critiquing their input.

Use first name (unless inappropriate) – Why add a person's name? There are at least two reasons. The first is using someone's name grabs their attention. We all like to hear our first name spoken. The second reason is the gift you have just received is highly personal. It is about you. Your appreciation should be equally personal.

Be genuine – Make it perfectly clear this is important to you. Communicate authentically that you will take into consideration their input in planning the next steps in your personal development. Your "Thank you, Carlos" is well received when it comes from a real appreciation of their attempt to help you develop your leadership skills. Make sure you have this sense of appreciation before you ask and listen.

EXAMPLE: "*Thank you, Karen. Your feedback is important to me. I will take some time to reflect on what you, and the others I am asking for help, have said and then get back to you. I really appreciate your input*."

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MEASURE SUCCESS:

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Frances Hesselbein, who Peter Drucker said was the best executive he ever met, devoted a chapter in her book Hesselbein on Leadership to The Power of Civility. In her words: "The effective leaders of the future are those who demonstrate in language and behavior their appreciation and respect of those in their enterprise."

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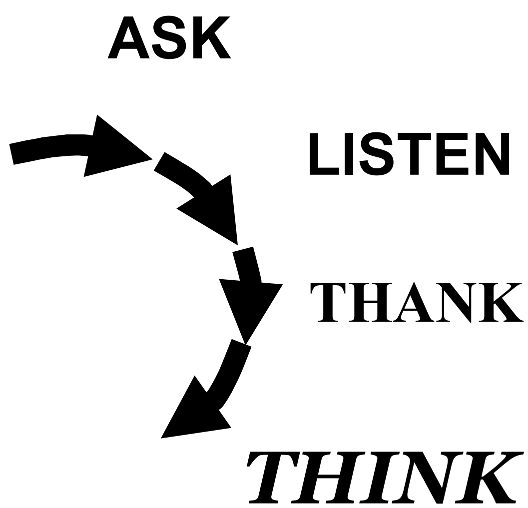

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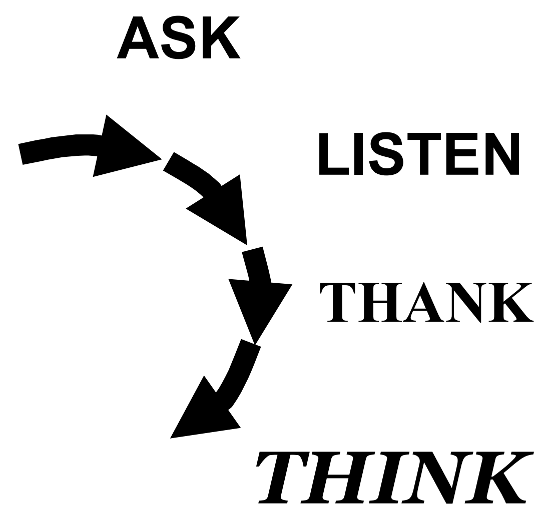

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Step 4: THINK

It is important for you to…

UNDERSTAND:

The reason for taking time to "think"

DO NOT:

- Engage in "delusional" thinking
- Prove the input is wrong
- Validate that "this is the way I am"

DO:

- Assess benefit of changing/cost of not changing
- Assess cost of changing
- Decide if it is worth it

MEASURE SUCCESS:

You have been successful in THINKING when you see yourself as:

- Not giving in to superstition or "negative" self talk
- Doing a levelheaded cost-benefit analysis
- Committed with your decision of what behavior to develop

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UNDERSTAND:

When you THINK after receiving feedback (or FeedForward) you are giving yourself the endowment of perspective. How often do we, even as the words are exiting our mouth, wish we hadn't said what we just did? THINKING allows us to prepare ourselves to ensure our response (the next step) is as effective as possible. We want to agree or disagree appropriately. We do not want to either over commit or under commit any future action on our part.

Bottom line: TAKING THE TIME TO THINK IS COMMON SENSE, if not common practice.

WHILE THINKING - DO NOT:

- Engage in "delusional" thinking
- Prove the input is wrong
- Validate that "this is the way I am"

Engage in "delusional" thinking – When the feedback or suggestions are different from our own self-concept, we have a tendency to reject the feedback. Some of the techniques we use to delude ourselves are: agree with the feedback, and assume the person is either confused, or confusing us with somebody else; or, agree with the feedback and conclude it is just not important.

Prove the input is wrong – In theory, constructive feedback is supposed to "focus on the performance, not the person". In practice, almost all feedback is taken personally (no matter how it is delivered). When the feedback is negative, it is easy to feel a sense of righteous indignation – "let me prove you are wrong." If you find yourself taking this path with your thinking, STOP.

Validate that "this is the way I am" – Many of us can be incredibly rigid in our thinking when the topic is our selves. Justifying our past actions with: "This is just who I am" is a weak response. Justifying our unwillingness to implement any suggestions in the future with this rationale is equally weak. Do not take a fatalistic view of your own behavior. Do not limit your view of the changes you can make in your behavior.

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UNDERSTAND:

When you THINK after receiving feedback (or FeedForward) you are giving yourself the endowment of perspective. How often do we, even as the words are exiting our mouth, wish we hadn't said what we just did? THINKING allows us to prepare ourselves to ensure our response (the next step) is as effective as possible. We want to agree or disagree appropriately. We do not want to either over commit or under commit any future action on our part.

Bottom line: TAKING THE TIME TO THINK IS COMMON SENSE, if not common practice.

WHILE THINKING - DO NOT:

- Engage in "delusional" thinking
- Prove the input is wrong
- Validate that "this is the way I am"

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You are doing a good job of THINKING when you can honestly look at yourself and keep the internal dialogue positive and future focused.

WHILE THINKING - DO:

- Assess benefits of changing/cost of not changing
- Assess cost of changing
- Decide if it is worth it

Assess benefits of changing/cost of not changing – Ask yourself over and over the same question: "*If I get better at* (add the behavior you are working on), *one benefit will be*?" Refuse to be satisfied with one or two benefits. Keep asking the question. Sometimes the most valuable benefits take awhile to surface. A complete analysis does not only look at the upside future benefits, it also considers the cost of not changing here-and-now. An awfully hard truth to swallow can emerge from such an analysis. That truth is we are successful *in spite* of some behaviors, not *because* of them. Any behavior that has become habitual to us had to have some positive effects for you. The question is: At what cost?

Assess cost of changing – Even when there are a lot of benefits to change, all change comes at a price. What is that price? What do we lose by changing? What do we have to give up? Answering these questions raises awareness that sometimes the cost of changing is rather small or insignificant. It only seemed great because we didn't assess our emotions and our ego.

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COST/BENEFIT EXAMPLE: The behavior in question - Having to win too much. A typical scenario goes like this. You discuss with someone where to go to dinner and you wind up losing. The dinner winds up being less than memorable. After dinner you have a choice to make for your own behavior. Choice A: Bite your tongue, say nothing, and enjoy the rest of the evening. Choice B: Telling him, or her, what a mistake it was to choose this restaurant. Explain how, if you had gone to the restaurant of your choice, it would have been a much better evening. Those who have to win are very likely to pick Choice B even though they know deep down it is not the right thing to do. We often do not think about the costs and benefits of the behaviors we choose to use.

Decide if it is worth it – Have you ever had much success in getting an adult to change a behavior he or she did not want to change? The same applies to you. Some behaviors are not worth changing. Others are. Even if there are a lot of compelling reasons to change and the costs are not that great, you have to make a decision. If you decide it is worth it to change, determine very clearly and specifically to what extent are you willing to change your behavior.

MEASURE SUCCESS:

You have been successful in THINKING when you see yourself as:

- Refusing to give in to superstition or "negative" self talk
- Doing a levelheaded cost/benefit analysis
- Committed with your decision of what to develop

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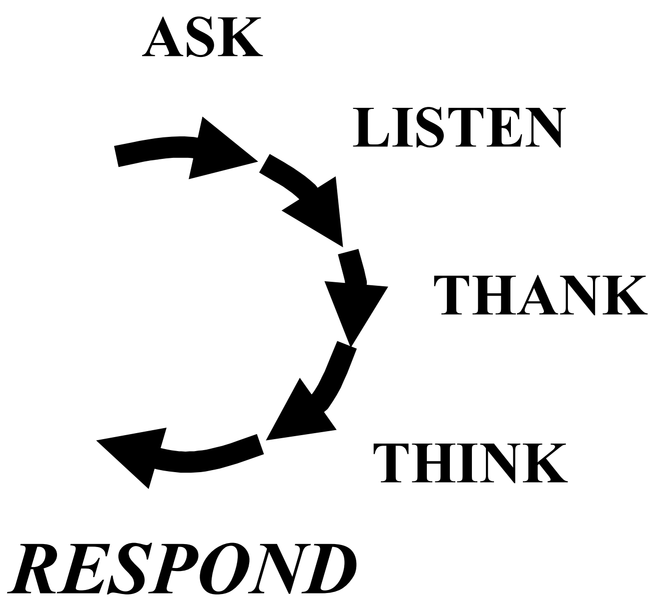

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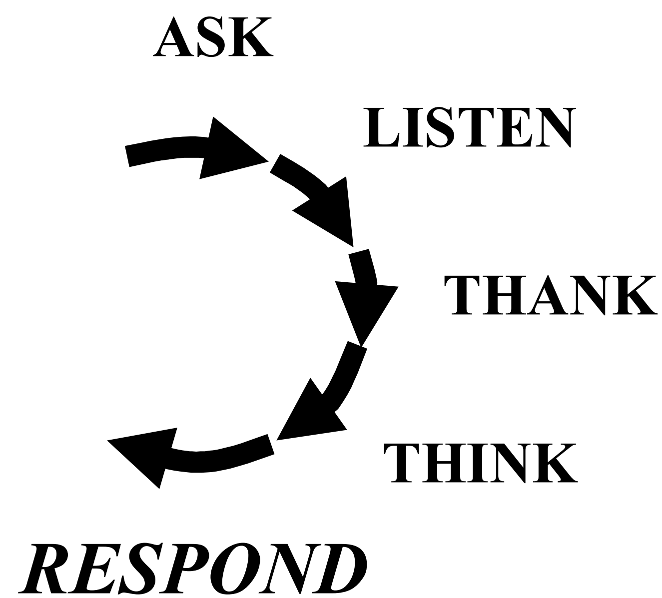

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Step 5: RESPOND

It is important for you to…

UNDERSTAND:

How your response to stakeholders foreshadows the key step that follows

DO NOT:

- Critique feedback/FeedForward
- Respond to too many things
- Over-commit

DO: (basically the same guidelines as ASKING)

- Be brief
- Be positive
- Be future focused

MEASURE SUCCESS:

You have been successful in RESPONDING when others see you as:

- Appreciative of help from all stakeholders
- Committed to improve
- Confident you will improve

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UNDERSTAND:

How people behave after receiving feedback or suggestions is very important to stakeholders. Stakeholders are paying attention to the response to their feedback (or FeedForward). The response is the first opportunity to provide "feedback on the feedback." The stakeholders giving feedback or suggestions are usually thinking: "How did the person take it?" An appropriate response is a positive event for everyone involved and creates a much greater anticipation that a positive change is possible.

The bottom line is: WHEN RESPONDING, SMALL THINGS MAKE A BIG DIFFERENCE, so respond carefully.

WHILE RESPONDING - DO NOT:

- Critique the feedback/suggestion
- Respond to too many things
- Over-commit

Critique feedback/FeedForward – When in the position of receiving feedback/FeedForward do not say: "I have heard this before." Little of value can come from this statement. The person hearing this sees you as: whining, not doing something about this feedback, or sees your defensiveness as more widespread and severe than previously thought. When it comes to suggestions, do not come across as evaluating or grading each suggestion. The person should not be able to detect whether you evaluated any suggestion as to its merit. You want to come across as listening, not critiquing.

Respond to too many things – People are very skeptical of a large list of "new year resolutions." Additionally, the reality of today's workplace is that there is limited time to get everything done. Too many areas to improve is a strategy doomed to failure. Do not let yourself fall into the easy path of failing to prioritize. Make tough choices on what feedback/FeedForward to implement. Successfully implementing a few things is far superior to failing to adequately implement a lot of things.

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Over-commit - Do not let any guilt or strong desire to make up for the past cloud what you commit to in your present response. The common sense approach of under-committing and over-delivering is an especially good one to follow when it comes to personal improvement. Successful people are driven to be successful. As such, they find it difficult to say no. Enthusiasm and optimism have to be balanced and tempered with reality.

You are doing a good job of RESPONDING when stakeholders cannot tell whether the suggestion you are implementing is difficult or easy for you to achieve. The one thing you want to be seen as is unquestionably committed to your personal development.

WHILE RESPONDING - DO:

- Be brief
- Be positive
- Be future focused

Be brief - Respond in a few minutes, or less. If you were successful in the previous step of THINKING, you have done a good job of editing your thoughts, and the response you make will be short and to the point. This is not the time to be overly complex. Keep it simple and stick to one or two main topics. Practice what you are going to say until it is committed to memory, and easy to communicate.

Be positive – Use your voice, tone, and body language to come across as motivated about what it is you have chosen to focus on. Emphasize that your efforts are directed on improving in the future, not rectifying anything in the past. Show your appreciation for their continuing feedback, suggestions, and support moving forward.

Be future focused – Focus the conversation toward what you will do tomorrow, not what happened yesterday. Request suggestions and write them down. You want to create a written record of desired future behavior from each stakeholder. If a suggestion is not valuable today, it could be very important sometime in the future.

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EXAMPLE: *"I received a number of suggestions on (*add the behavior you are working on*). I appreciate your support on this. What I plan to work on in the coming month is (…*one or two suggestions from stakeholders*). Would you pay attention to my behavior and let me know how I am doing relative to implementing these suggestions. Your ongoing help is so important to my progress."*

MEASURE SUCCESS:

You have been successful in RESPONDING when stakeholders see you as:

- Appreciative of help from all stakeholders
- Committed to improve
- Confident you will improve

How you RESPOND is a validation, or invalidation, of the time people took to provide you with feedback or suggestions. Brief, positive, future-focused communication is uplifting for you and the person hearing it. By making a public commitment regarding "the behavior you are working to improve" and "what you plan on doing in the future," you are demonstrating your commitment. For the person hearing your commitment, your response is a confirmation that you intend to hold yourself accountable for your development and a brighter future.

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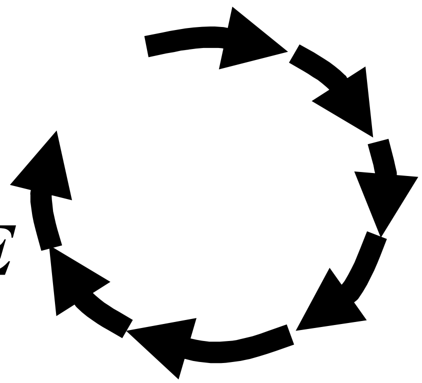

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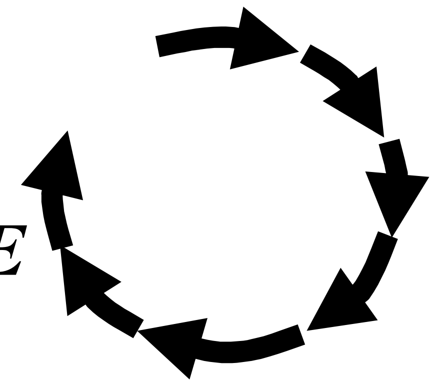

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Step 6: CHANGE

It is important for you to…

UNDERSTAND:

You cannot improve by staying the same as you are today.

DO NOT:

- Procrastinate
- Give into “feeling like a phony”
- Expect instant success

DO:

- Implement suggestions in parallel
- Maintain momentum
- Make change visible

MEASURE SUCCESS:

You have been successful in CHANGING when others see you as:

- Actively working on what you committed to improve
- Demonstrating success
- Not likely to return to your old habits

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UNDERSTAND:

A well-worn definition of lunacy is – Doing the same thing over and over again and expecting different results. Different results require different actions. As ancient Chinese wisdom points out, change is an interesting mixture of threat and opportunity. You have to be willing to destabilize your own status quo (the threat) and try something new (the opportunity) in order to reach your desired effect.

The bottom line is: FOCUS MORE ON THE OPPORTUNITY, NOT THE THREAT.

WHILE CHANGING - DO NOT:

- Procrastinate
- Give into "feeling like a phony"
- Expect instant success

Procrastinate – Arnold Schwarzenegger once said: "No one ever got muscles watching me work out." Putting off what you can do today for tomorrow with the rationale that later will be a better time, is pure baloney. All the reasons why it will be better to wait a little while will still be present in a little while. Remind yourself over and over that now is the perfect time to do something. The reality is there is no time better than today to get started.

Give in to "feeling like a phony" – When you are in the process of changing behavior you are also in the business of changing your view of yourself. We call this your self-concept. Doing something different is obviously outside the realm of who you are today. The most common result of attempting something new is a nagging feeling: "This isn't me." This sense of a fake, non-genuine, counterfeit you, can hold your back from improving. Why? It is the part of you that is threatened and doesn't want to risk changing. Quiet this voice inside of you.

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Expect instant success – Unless you are a natural, any new behavior will not be performed well at first. It is like reprogramming the way you snow board, swing a golf club, dance, listen, delegate, etc. Awkwardness is a likely outcome when first trying out a new behavior. Keep working through the rough spots until the behavior becomes a skill and begins to feel natural.

You are doing a good job of CHANGING when: 1) you have silenced the voices telling you to stop the charade and return to the good ole "real" you; and, 2) you've progressed beyond the apprentice stage of awkwardness during skill execution.

WHILE CHANGING - DO:

- Implement suggestions in parallel
- Maintain momentum
- Make change visible

Implement suggestions in parallel – All systems have a built in defense mechanism against change. Change can be imposed, yet systems show remarkable ability to snap back to their original shape. An effective strategy is to overwhelm this natural defense mechanism with too many things happening at once. This strategy is called parallel action. If you are only doing one thing in your attempt to add, delete, or modify a behavior, you are susceptible to a single point failure. If this one thing doesn't work, the change fails. Parallel action, on the other hand, can have a number of failures and still have enough success to break your natural defense's ability to snap back to old habits. You are only working on one leadership behavior, yet implementing a number of different suggestions will help achieve the change and make it permanent.

Maintain momentum – Do not underestimate the time it takes to make a lasting change. Old habits are amazingly resilient. Contentment with early successes can lead to an easing up on the throttle. Changing a behavior is not complete until the new behavior becomes the habit, or de facto standard. A constant pace is better than fits of starts and stops. Develop a rhythm of change.

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Make change visible – With the incredibly busy lifestyles we all live, it is easy to lose sight of what is important. This goes for yourself as well as your stakeholders. For yourself, find ways to remind yourself of your behavioral change goal. Write it down. Put your goal where you can see it; for instance, on your screensaver or post-it notes in prominent locations. Change locations periodically so it doesn't become wallpaper. Ask a trusted colleague to check in with you on your progress (maybe even daily at first; then weekly). When you can keep your behavioral goals active in your mind you are succeeding.

MEASURE SUCCESS:

You have been successful in CHANGING when stakeholders see you as:

- Actively working on what you committed to improve
- Demonstrating success
- Not likely to return to your old habits

There are actual debates about whether adults can change their behavior or not. Those who follow the methodology outlined here are constantly adding "proof points" that change is not only possible; it is characteristic of truly successful people.

As a good Stakeholder Centered Coach, you want to be conversant in the 7 Step process. What this means is you are able to talk about both the Do's and Don'ts in a conversational style being able to give examples and stories that illustrate the importance of following these steps during the development of a new leadership skill.

Some Leaders you will coach do not need anything more than a quick scan of the one-page Do's & Don'ts you have given them. Others need more help and reinforcement to internalize these important skills.

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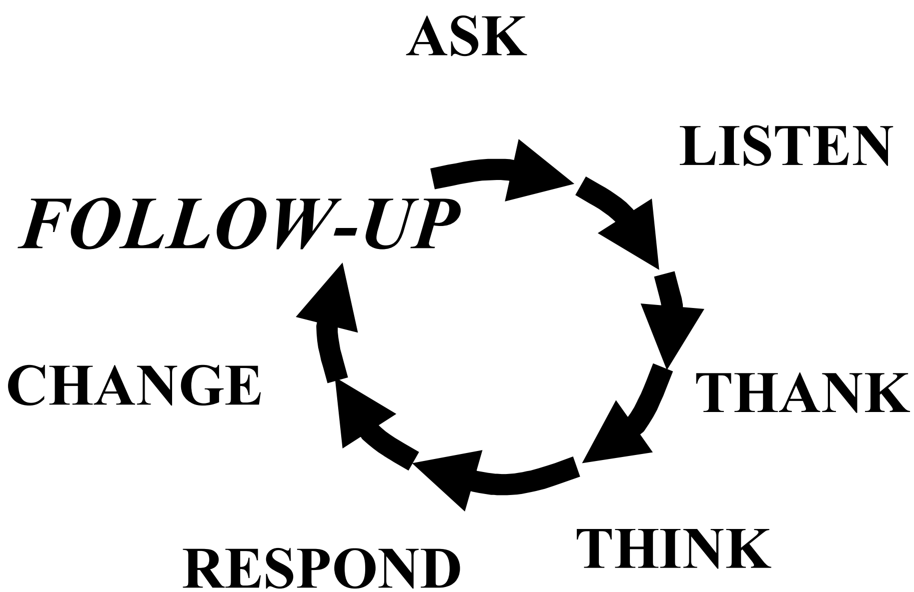

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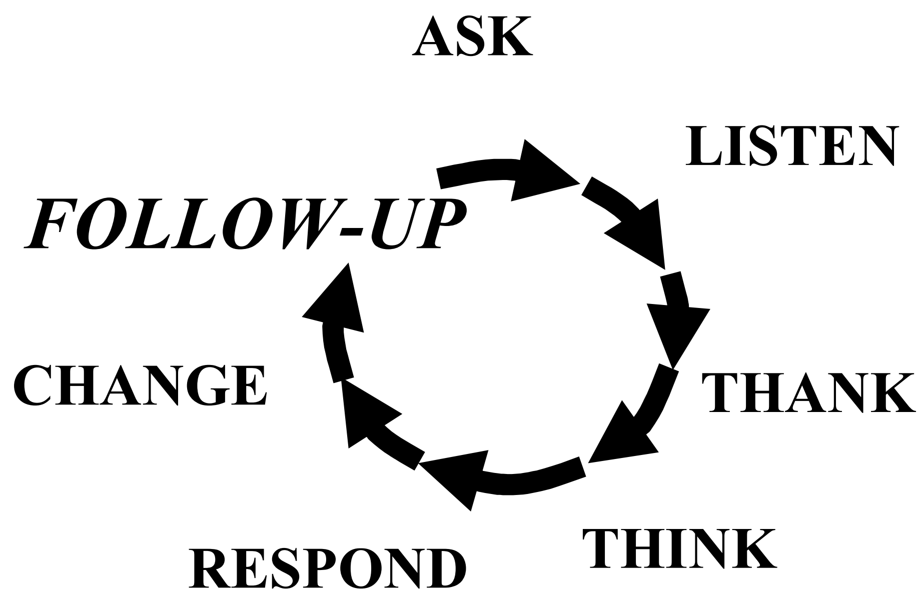

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Step 7: FOLLOW-UP

It is important for you to…

UNDERSTAND:

This is the most important Step of all

DO NOT:

- Dwell on the past
- Become complacent
- Brag, gloat or show off

DO:

- Politely push for specifics
- Reinforce the process
- Check your ego at the door

MEASURE SUCCESS:

You have been successful in FOLLOWING-UP when others see you as:

- Eager to gain stakeholders insight
- Learning from the experience
- Producing measurable results

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UNDERSTAND:

This is the most important step of all because it is the most effective way to change "perception." Success, in the long run, requires changing your behavior and the perception of stakeholders. Between the two, changing perception is a far more challenging. People find it very difficult to change existing judgments, inferences, assumptions and beliefs about you.

The bottom line is: FOLLOW-UP, FOLLOW-UP & FOLLOW-UP

WHILE FOLLOWING UP - DO NOT:

- Dwell on the past
- Become complacent
- Brag, gloat or show off

Brag, gloat or show off – When you start receiving positive reinforcement for implementing suggestions you have received, DO NOT come across as arrogant. Progress is simply that. You do not want to come across as: "Aren't I great for making these changes." It is far better, at this point, to pass the credit on to your stakeholders. Make your stakeholders the heroes.

Dwell on the past – Feedback and, by inference, suggestions can reinforce the feeling of past failure. Some people possess a near-photographic memory of previous "sins" and the long history of shortcomings in a particular area. Do not allow yourself (or others) to fall into a pattern of focusing on your past. Keep the conversation present and future oriented.

Become complacent – Over time the process can seem to be getting stale and to be providing less valuable feedback or suggestions. If you have made substantial progress and stakeholders simply do not have much to say except "keep up the good work," still keep asking, listening, thanking, and pushing for further suggestions. In running track this is called "running through the tape." The race is not over

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until your new behavior is both a habit and the perception is permanently changed in your stakeholders.

You are doing a good job of FOLLOWING-UP when the process itself is the norm. A monthly check-up is a good rule of thumb for behavioral change issues. Another signal of your success is when your "internal" stakeholder coaches do not wait for the monthly check-up to give your feedback and suggestions.

WHILE FOLLOWING UP - DO:

- Politely push for specifics
- Reinforce the process
- Check your ego at the door

Politely push for specifics – Many people are really rather poor at giving constructive feedback and helpful suggestions. In following up, if the comments are general and vague, ask for specific examples using a non-confrontational tone. When a person cannot provide specifics be thankful anyway and remind them to keep an eye out for specifics in the future. The more concrete the feedback, the more useful for you and the more likely you can change others' perception over time.

Reinforce the process – Every time you meet with a stakeholder, reinforce the value of the process regardless of what you receive during the one-on-one. Always end the conversation with something like: "This process continues to be very useful to me and will provide me with lasting value. Thank you, Elizabeth." Give all the credit to your stakeholders for the successes you have made in changing behavior. They deserve it.

Check your ego at the door – Successful people have a strong tendency to want to win. This "will to win" has served them well in many instances. To a large measure it is why they are successful. However, when it comes to the follow-up check-ups, this tendency needs to be muzzled. It is important to recognize that this is not a contest. Or, another way to put it, the way to win in follow-up meetings is to check your ego at the door. Be humble about the process of change.

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MEASURE SUCCESS:

You have been successful in FOLLOWING-UP when stakeholders see you as:

- Eager to gain stakeholders insight
- Learning from the experience
- Producing measurable results

The secret to success lies in the execution of the process, namely the seven steps outlined in a disciplined manner. When this process becomes habit:

1. You will have succeeded in making a measurable, positive change in your behavior
2. The stakeholders will feel like they helped you
3. You will continue to become more successful as you use the process

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