

Marlene L. Peterson

Executive Coaching Development Plan

Background

To assist with my professional development, Acme engaged Peter Leets of the Leets Consortium to:

- design and conduct a 360° feedback survey;
- work with me to develop a plan to address development themes raised in the survey
- assist on a go-forward basis with the implementation, maintenance and monitoring of the actions outlined in the plan

The 360° feedback survey Peter designed gathered perspectives on a confidential basis from superiors, peers and direct reports which he then shared with me in a way that maintained the confidentiality of individual respondents. The list of individuals contacted was determined through discussion amongst Peter, Roger as my immediate supervisor, and me and was comprised of the following:

- Lawrence Smith
- Ramon Garcia
- Harriett Beater
- Wendi Hill
- Karen Donaldson
- Bob Carlson
- Tim Haniford
- Marissa Wildman
- Connie Tolleston
- Penny Wilkes

360° Feedback

With a representative group of respondents and a very strong response rate, it was considered that the feedback provided by these individuals was valid and representative of the whole and I have considered it as such. As is likely the norm with this type of survey, there were some limited instances where contradicting feedback was provided however this was relatively minimal and did not affect the utility of the feedback in its entirety. Without exception, I was impressed with the degree of thoughtfulness, candor and constructiveness with which these respondents replied to this survey.

The feedback highlighted some positive themes. From the feedback, I am perceived to be intelligent, professional, straightforward and highly focused on getting the job done to a high degree of quality. My commitment, energy and strategic approach to problem-solving were also called out in the responses.

The balance of this document focuses more on those themes that were indicated as areas for further development and other than the contribution any of these strength areas might play in addressing the development areas, they will not be further dwelt upon.

With the prevalence of the strength areas noted above along with my undertaking almost three years ago to engineer a fundamental change in our business engagement and service delivery model, several other aspects of my management style have been neglected and/or require further development and were similarly called out in the 360° feedback. Aggregated into broad themes (with some degree of overlap), these form the content basis of my development plan and are listed below:

- Relationships – taken as a whole, the feedback highlights a need for me to develop and maintain more and closer relationships with people all around the 360° circle. The drive toward accomplishment and lack of focus on the people around me has taken a toll on existing relationships and impeded development of additional relationships. Further, I am perceived to be too closed off to others and rely on people only when I need something.
- Communication – perhaps the largest single theme area called out for further development, my style, means and extent of communicating with those with whom I interact was identified. I am perceived to be arrogant, judgmental, stand-offish and stiff at times, overly intense/volatile, and aggressive. Also, I need to become more effective at keeping my people informed of meetings and activities in which they do not participate directly and to spend more time just talking with people outside of more narrow work-content discussions.
- Management / Leadership – with my peers and subordinates, my style of management and leadership forms the final area for development. Not enough effort is being spent on being more of a team player and I come across as too territorial and not open or respecting of alternative viewpoints and people. My

direct reports as a group are likely impacted the most by my shortcomings in this area and my improvements here will translate directly into this group becoming a far more effective team.

Action Plan

While there were certainly aspects of this feedback that were less than pleasant to learn, taken as a whole I am both motivated and optimistic about addressing the development areas since people largely indicated that they saw the value I bring to the organization and that if I were able to address the issues raised they believe I am capable of making a more effective and sustained contribution to the Acme Information Technology organization and also to Acme as a whole. I am also very confident in my ability to make the changes necessary to address these issues and do so on a sustainable basis.

In addition to the specific action items making up this plan that are detailed on the following pages, there are three critical elements addressed here. Sponsorship, mechanisms for monitoring sustained progress, and confirmation of the 360° feedback are all essential components of this plan.

As my primary sponsor, I will review this entire plan with Roger and every component herein is subject to his suggested revision and/or agreement. Roger is by far my biggest supporter in this organization and his agreement and buy-in to my development remains of critical importance.

As far as monitoring mechanisms are concerned, I will enlist the involvement of certain respondents from the peer and direct report groups and review the action plan with them. Going forward, I will meet with them periodically on this topic and take their perspectives on progress against the plan. In addition, I will ensure they feel fully empowered to call to my attention where they see behaviours inconsistent with this plan. I intend to approach Tim Haniford as a direct report to act in this capacity.

With Tim, I will set up standing one-on-one meetings at least monthly with feedback on this plan. In addition, I will use this meeting to tap into expertise, resources, etc. available within the HR department relevant to my specific development objectives (e.g., the HR organization around leadership and management goals etc.)

I have selected Marissa Wildman as a representative of my peer group for a couple of reasons. First, in our respective roles, we have very frequent contact and that contact often covers topics with some degree of contention. Second, I have full confidence in Marissa's ability to be completely candid and open in discharging this role.

I selected Ramon Garcia from my direct reports primarily due to his skill and success and a manager of people. Across the organization, as measured by the culture survey and direct feedback and observation, Ramon is seen by his staff and by other members of the group to be a very supportive, approachable and sympathetic member of the management team.

As far as monitoring my progress against those objectives relating to visibility and relationship building with the senior executives, I will approach Mike Brainy in his

related capacity as my mentor to help me achieve progress in this area, also to include some appropriate means of measurement.

Another important component to this plan as I begin its implementation will be a confirmation process back with the respondents. As stakeholders in my development, I would like to respond back to them that I have received, appreciate and consider valid their feedback. This will be done through one-on-one communications for all respondents other than the direct reports. For the direct reports as a group, I will provide this confirmation back to the group as a separate agenda topic in a staff meeting (videoconference for non-Toledo staff).

Action Plan – Relationships

- Actively work on the quality of one-on-one relationships with peers and direct reports. As reminders and/or mechanisms for assisting me to do so:
 - Utilize the recurring HR and Direct Report meetings as forums to initiate non-business conversations with peers and direct reports. Have as explicit goals from these meetings to learn more about what is going on in these individuals' lives away from work and let them learn more about me. Undertake self-assessment quarterly on progress against these goals
 - Each week (scheduled on calendar) spend time on calls for the same primary purpose as above
 - Leverage RSM monthly people quiz at all-hands staff lunch to focus on people outside their work roles
- Seek mentor input to establishing / furthering relationships with senior executives and determine the appropriate means for measurement of same
 - At the outset of this mentoring process, articulate what I want to achieve in terms of my development from this class of relationships and also what I believe I can provide, on behalf of Mike my organization or from me as an individual to these individuals (i.e., the business rationale for this activity from the perspective of the other person)
 - Determine with my mentor what and when appropriate milestones would be for this effort
- Include summary objective on FY06 objectives

Action Plan – Communications

- Fully embrace a principle of real respect and openness in all communications with all people I interact with in the workplace and determine some means by which to have a constant visible reminder of this goal. Strive to be non-judgmental and be aware of body language that could work against this. Be aware of a perceived tendency toward anger – maintain even temper and work on being less intense and more easy-going in work-related communication wherever possible.
- Practice effective listening techniques
 - Guard against interrupting / talking over in conversations
 - In discussions around more contentious topics and discussions, confirm (in non-judgmental tone) my understanding of others' points before responding
 - As often as is feasible, set a goal ahead of meetings and discussions to listen more than talk
- With priority placed on peers and subordinates, seek opportunity to engage in non work-related communication with people. Relax self-imposed 'standards' of work-related focus in these communications. Get to know people better and allow them to get to know me outside of our professional roles
- Have a standing staff meeting agenda topic to provide HR updates to direct reports. Become more effective at cascading electronic communication to direct reports.
- Include summary objective on FY06 objectives

Action Plan – Management / Leadership

- Work on the health of direct reports group as a discrete project. Strive to be less directive and telling with this group. Promote members within the group to their peers. Generate opportunities to showcase these people and their accomplishments to senior executives
- Ensure that the two primary standing forums for my direct reports (bi-weekly Toledo staff meeting and monthly global conference call) evolve to suit the needs of my direct reports. Solicit frequent feedback on the effectiveness and improvement suggestions for these meetings and respond accordingly
- Strive to be more visible to all staff and provide inspiration by describing where we are going as a group and what that means for individual members of the team
- Proactively contribute to the health of the HR as a discrete project. Strive to be more engaged and open with this group. Work to remove perception of territoriality amongst this team
- Include summary objective on FY06 objectives