

Executive Coaching and

Developmental Plan

For

Jane Hall

Background

As part of my individual goals for FY0X, I am focusing on my leadership development. To do this, Acme Colleges has allowed me to work with an executive coach. Acme selected The Leets Consortium to work with me to develop my executive skills. The process begins by obtaining a true understanding of how I am perceived among the various people I work and interact with daily. This was done using a 360° assessment where individual and confidential interviews were conducted with my supervisors, peers, sales team and direct reports, past and present. Those chosen were discussed and agreed upon with my supervisor and included:

- Tom Brown
- Mary Smith
- Mike Cochran
- Ron Hall
- Peter Graves
- Chris Carpenter
- Dena Mock
- Diana May

Questions asked:

1. Please describe your professional relationship with Jane.
2. When you think of Jane, what comes to mind?
3. What do you feel are Jane's strengths?
4. What areas do you feel she would benefit from through further development?
5. Do you view Jane more as a manager or leader? Why?
6. How is she as a communicator?
7. Motivator?
8. Do you view Jane as a team player? Why?
9. How would you rate Jane's political savvy?
10. What one thing would you suggest to Jane she would benefit most from addressing?
11. What else would you like to say about Jane?

All feedback was presented to me in such a way that maintained confidentiality with participants. I reviewed it and allowed it to sink in before beginning my thought process and developmental plan.

360° Feedback

I agree that the responses from the 360° represented a fair and valid assessment of how I interact with my coworkers, peers, managers and staff. There are a few instances that included some contradictory comments, however, it was minimal and did not skew the overall conclusions.

There were many key positive themes and elements that prevailed within the feedback. I am perceived as intelligent and knowledgeable, a team player that works with the team to accomplish goals, hardworking, energetic with a strong work ethic. Overall I am liked and respected as a member of the team.

However, the remainder of the feedback focuses on areas that need further development and attention so they become areas of strength for me to become a more effective part of the team and create a more productive working environment. The biggest point I learned from this exercise is that it's not what I do, but how do it. It's really my style that is holding me back and not my capabilities. The following three areas will be the basis for my developmental plan where I will focus on improving and making changes to be more effective.

- **Communication:** Overall this is the area that was most often mentioned in the responses. Most obviously, this is a place I need to develop and improve so I am not perceived as I am today where I speak too often and too long, not necessarily communicating at other's levels, resulting in other's not understanding or relating to me as an authority figure. I need to develop my listening skills, be clear in all communication and provide more explanation including the "why." I need to think about what is said before I respond.
- **Leadership:** My leadership is another place that needs focused development. I am viewed more of a manager than a leader. I need to see more of the big picture, not focus on the detail (get out of the center of it and leave that up to my team), and exude more confidence, portraying a calm, confident exterior. I need to become more proactive, learn to read others and situations better. This will enable my staff and peers to value my input and look to me for the knowledge and skills I bring to the organization. Then I believe they will respect me as they do other leaders. It will also provide confidence to the senior executives whom I interact with that I have the abilities to do my job. I need to be more confident and take credit for wins and not so much for losses.
- **Management:** I need to improve the way I manage up to my supervisors as well as down to my team. I tend not to allow peers and direct reports to help or even look at their suggestions as another way to approach things. As a leader I need to allow this for their growth and mine. I need to encourage their feedback and be receptive to their ideas. I must focus on

selling ideas effectively so both my supervisors and peers understand and agree. This ultimately impacts the effectiveness of our team.

Developmental Plan Objectives

Many portions of the feedback were very hard to hear and swallow, but taking a step back and letting it sink in, I see that it is truly valuable. Some points were areas I was aware of and try to focus on now, but have not seen a change. Other areas surprised me and forced me to do some soul searching to accept them. I believe I am capable (with much effort and assistance in some areas) of changing my behavior as needed as some areas may be, because I am seen as a contributor and valued part of our team. I am optimistic that I can become more effective to the Marketing Department, Division team, and Acme College.

The plan involves specific action items, coaching, advisement to monitor progress and constant feedback. I will review the plan and work closely with Peter Leets, my executive coach, as well as reviewing and discussing areas with supervisors.

During the process, to monitor my progress, I will ask involvement from those I work with, my peers, staff and management. I will review aspects of the plan with them and meet with them periodically to obtain their perspectives. They will be empowered to direct or inform me when I responding differently than with the plan. Reinforcing these behaviors will allow me to make permanent changes and keep me on track.

Monthly, I will meet with my direct supervisor to discuss feedback. In these meetings we will discuss other resources that may be available to me to help me develop my goals (such as the MBO, Human Resources directives, etc.).

I will also select a representative from my peer group and staff who can candid and fair. I will ask Mary Smith from my peer group to be my representative because she is forthcoming, diplomatic, and candid. We have constant interaction and will provide the honest feedback with suggestions.

I would also like to ask Ron Hall to provide feedback, especially focusing on leadership. It would be helpful that after meetings we both attend he spend a few minutes to provide his assessment on my actions. This way I can make sure I am on the correct path in making changes. Any input he receives from the sales side of the business, including my division president and VP would also be welcomed and appreciated.

To monitor my progress against the objectives relating to visibility and building respect and relationships with the senior executives, I will approach the division head as my mentor to help me and include some appropriate means of measurement.

Finally, I will address all those who participated that I have received, heard, and appreciate their feedback. I will meet with my team members in a staff meeting and will meet with my peers and supervisors one-on-one. It is clear that I am more of a manager than a leader and that is the goal with this plan and all the elements that are incorporated. It will be a challenge for me to make these adjustments to my style, as I am one for instant gratification. However, I will remind myself regularly that change is learned and ingrained – a process that occurs over time. I desire to be an effective part of our team and to lead by example as do my supervisors.

Action Plan – To Improve Communication:

- Improve verbal communication by being more concise, thinking thoughts through first, before responding with articulate, short direct statements
 - Prior to speaking, think through exactly what “key” elements need to be communicated and relay in a focused manner not in a stream of words
 - Keep on topic, don’t skip around even if where I am going relates to topic; if I must include further details, use transition to tie thoughts together and make them brief
 - Speak in 10 second increments then pause and ask listener(s) if s/he is following me
 - Write out bullets or notes to keep on track and be short and concise prior to meetings or discussions
 - Communicate at the lowest common denominator by summarizing what was asked or said and explain/answer in the same way or level (Mimic communication style of those speaking with)
 - Minimize what is said, condense thoughts and articulate succinctly after thinking through thought – Less is More (use above elements)
 - Put “Less is more” more on my calendar to pop up during the day to remind me to sit back and think about my communication style

- Practice effective listening techniques
 - Be aware and don’t interrupt or talk over others or answer before having all the information – summarize what I heard and then think before responding
 - Count to five in head and think about question/statement or what was said before responding
 - Summarize or repeat other speaker’s point to confirm understanding before responding
 - Use verbal and physical clues/motions to communicate listening to speaker
 - I will pick a time everyday/evening to journal and reflect on my interactions during the day focusing on key questions:
 - Who did I interrupt today and why? (speaking over someone else)
 - Who interrupted me today and how did I feel about it? (speaking over someone else)
 - When today did I speak about many subjects at the same time?
 - When today did I change subjects?

- Tape/record sessions with my coach to become aware
 - Listen to determine when I change subjects to become aware
 - Listen to determine when I speak about many subjects in the same thought
- In staff meetings
 - Take the time to explain the why when explaining tasks and assignments, not just the how
 - Provide clear priorities and timelines
 - Prepare with bullets or notes for each agenda item prior to meeting
 - Ask if all are clear on direction or what was discussed
 - Communicate at the lowest common denominator by summarizing what was asked or said and explain the process in the same way or level. (Mimic communication style of those speaking with)
 - Communicate FY07 objectives clearly to staff
 - Make a deal with my team to agree that if I go off topic they should make me aware so I change the habit – Do the same with them
- Make written communication concise and clear and only respond when necessary
 - Reread aloud before sending to make sure all points are succinct and clear, specifically when sending quickly from my Trio
 - Determine which emails are in need of response and do so appropriately
 - To send email to the AE and not agency so AE can clarify to me or present to the other party
 - Only send the email to all if a top 3 issue is missing or will affect the outcome not asked or responded to immediately and the AE is unavailable (try to speak with the AE first to send the email)
 - Determine who should be included on responses and limit replies
- Respond to others based on individual's style
 - Become aware of each person's communication style and how they relate to me
 - Be more or less detailed based on person I am speaking with, communicate at that person's level

Action Plan – To Improve Leadership:

- Focus on changing my behaviors so I become a stronger leader
 - Exhibit confidence by becoming calm and non-stressed (note when I am stressed; I get impatient)
 - Pick something to focus on to bring me to this point as things occur – August 9, 200X
 - Learn to more effectively change my reactions as not to appear as “overreacting” when I respond – they read my body language and face
 - watch for blank stares, or a smart aleck comeback;
 - ask questions – Am I overreacting/Have I lost you/Are you unclear
 - Become less involved in detail and get out of the minutia –
 - Delegate more to AEs – July 28, 200X
 - Provide meaning full motivation only when appropriate by calling out “kudos” in public as well as in written communications or one-on-one
 - Become more assertive and expand role
 - Read the Adaptive Coaching book to understand ways to work with all groups, apply suggestions from book – begin July 28, 200X
 - Obtain other books that may help (Coach to recommend – July 28, 200X)
- Monthly hold informational sharing meeting where each staff member shares what they are doing with group
 - Here I will focus on developing individuals ideas, suggestions and speaking skills that will help the organization – August 200X
- Learn to sell ideas to all levels
 - Find details and examples of the why an idea is the way to go
 - Focus on style, delivery and timing of what I am selling
 - Think about how it benefits the person I am speaking to
 - For executives, provide executive summary and then ask if they would like detail – July 31, 200X

Action Plan – To improve Management:

- Solicit input from staff on processes and/or projects as I present and agree as team on the best way - July 31, 200X
 - Use team's individual strengths
 - Call on XXX for ideas regarding linking data if applies
 - Call on XXX for newspaper placement/buys
 - If I explain the project, before determine plan, ask them if they see another way to go about the project or assignment (before I present my suggested approach)

- Give out staff more kudos overall
 - One-on-one, in writing and in front of their peers – August 1, 200X
 - Specifically if one team member creates a an easy format or way to do something
 - Acknowledge those who are helpful and go above requirements on a broader spectrum
 - Find opportunities to showcase these employees to upper management as well as their peers
 - Nominate for Employee of the Month
 - Send an email to all those that apply, including sales team
 - Say something at monthly staff meeting

- Learn to manage up
 - Choose words carefully, determine what to say or not speak at all
 - Ask myself if it will make a difference, is it meaningful to those present – August 4, 200X

- Team meetings
 - Provide verbal and physical cues that acknowledge points are heard
 - Summarize, restate points during meetings
 - Discuss all suggestions and determine as a group on actions that apply to all
 - Work with and agree with team to create improvement plans and goals for FY0X
 - Be positive and be aware that I am being viewed as communicating as a leader should be based on this plan
 - Make a deal with my team to agree that if I go off topic they should make me aware so I change the habit – Do the same with them

Action Plan – To Improve Balance:

I believe I must find ways to balance my work and home (outside) life. I believe some of my characteristics described in the 360° (stressed, always in a rush, frustrations) stem from not having enough time after work hours to accomplish the things I must do and the things I want to do.

- Each day start by reviewing my To Do List and re-prioritize items by what has transpired since the day before
 - Rearrange based on additional unscheduled meetings that arise
 - Spend 20-30 minutes each day with the door closed to complete anything that is mandatory (includes review of Leadership Plan)
- Make a point to leave at a reasonable hour (6-6:30pm) 3 nights a week to make time to accomplish tasks and enjoy my “outside of the office” personal life
- After 7pm, check my Treo periodically based on issues (put it away if nothing is considered a “hot” item)
- Every Friday clear office of clutter and file so I come into the office with a sense of calming on Monday mornings
- Throughout the week keep clutter to a minimum to reduce stress
- Reintroduce workout schedule back into weekly routine
- Reintroduce workout schedule back into weekly routine to reduce stress, obtain consistent sleep pattern and help overall health
 - 2-3 time per week only so as not to give up – August 1, 200X
 - Arrange with workout partner to go back with me – August 1, 200X

Closing:

I appreciate this opportunity to improve my skills and become a better, more effective employee. I realize that you believe in me and are willing to provide this program to help me achieve all my goals, including becoming a leader within our team and organization.

I know it is just beginning, but the process so far has been challenging, specifically realizing how others see me, and where my weakness lie. It wasn't easy to absorb and take the information in, but as I have, I am more eager and motivated to surpass these goals. I depend on your feedback and communication to help me get there and confirm that I am on the right track and addressing the necessary elements.