LEAD Executive Consulting, LLC

Executive Coaching Services

Executive Coaching

Retreat/Meeting Facilitation

YPO Forum Services

Organizational Development

Job Transition

LEAD
EXECUTIVE CONSULTING LLC

Making Success, Peace of Mind, Joy, and Hope a reality for executives through thoughtful guidance, accountability, and trusted advisor services

Agenda

- ❖What is Executive Coaching?
- ❖Who is a candidate?
- ❖Case Studies
- ❖Benefits of Executive Coaching
- ❖Executive Coaching Process
- ❖Re-cap

What Executive Coaching Is Not…

- Mentoring – a reactive, unstructured support by someone who has "been there, done that."
- Therapy – a proactive, structured support that looks at the past to find root causes of a current challenge.
- Consulting – a task specific and focuses on completing a project and generally is not designed to increase skill sets of an individual executive (client).

What Executive Coaching Is…

- Quality Executive Coaching Program Characteristics
  - Partnership between a senior leader, an executive coach, and the sponsoring organization
  - A proactive and structured support for executive
  - Looks to the future
  - Plans and focuses on raising the bar
  - Uses the coach's thoughtful guidance and accountability
  - Aimed to *enhance* individual learning and development
  - Achieves measureable, agreed-upon success metrics which directly affect business goals.

Who is a candidate for coaching?

- ❖Leader in transition (i.e., moving either to a new role, or experiencing significant change in present role)
- ❖Leadership team operating in a volatile, high-change environment
- ❖High Potential (i.e. individual identified as having leadership traits necessary for success in the future)
- ❖Executive promoted as a result of technical skills with limited management experience

Who is a candidate for coaching?

- ❖Remedial assignments to address listening, communication and/or leadership style issue with mid to senior leaders
- ❖Targeted skill-building assignments to improve an individual's performance in their present role (e.g., team dynamics; strategic planning; performance management)
- ❖Developmental assignments focused to 'round out' and groom an individual for new areas of responsibility

Benefits of Executive Coaching

Top executive challenges

- Executive productivity and time/energy management
- Revenue and margin results
- Employee performance and development
- Customer satisfaction and referenceability
- Retention of best performers

Benefits from coaching

- Increased productivity and time/energy management
- Enhanced revenue & margin results
- Elevated employee performance & development
- Improved customer satisfaction and referenceability
- Cost savings realized by retention of best performers

Metrics Supporting Cost Benefit

- ❖Return on expectations (ROE) is used when the measurement of the return of investment is too difficult or not feasible. ROE essentially equates to whether or not the measurable outcomes that are agreed upon are met by the end of the coaching period. The case studies that follow relate to ROE.
- ❖Return on Investment (ROI) is used when there are direct correlations to measureable benchmarks (i.e. increased sales) that relate directly to measureable business goals.

Case Study #1

Administrator for professional services firm

Situation: Managing partners for professional services firm engaged LEAD Executive Consulting for a coaching assignment with the firm's administrator. Initial assessments indicated areas for development included Leadership, Strategic View, and Drive for Results. Concern existed as administrator's awareness of deficits did not exist.

Action: After discussions with the coach, administrator developed a customized development plan to address the three items above with the goal of increasing the scores (for managing partners and staff) by 20% within six months. Coach and sponsor agreed and signed off on plan.

Case Study #1

Administrator for professional services firm

Results: At six months, administrator exceeded goals with both staff and managing partners. With staff, administrator exceeded 50% increase for 8 of 11 dimensions measured.

Dimension	Staff		Managing Partners	
(Score Range= 1 –> 6)	Score Δ	6 month Δ	Score Δ	6 month Δ
Leadership	3.31 -> 5.01	+53.9%	3.55 -> 4.56	+28.6%
Strategic View	2.93 -> 4.70	+60.5%	3.0 -> 4.50	+50.0%
Drive for Results	3.33 -> 5.05	+51.4%	3.58 -> 4.79	+33.7%

Case Study #2

Associate for professional services firm

Situation: Professional service firm hired LEAD Executive Consulting to work with Associate who unintentionally made inappropriate comments when in groups of people (4 out of 5 times). Additionally, coach was engaged to assist with improving skills for client development and relationships.

Action: Coachee created a customized personal development plan to address the communication and client relationship pieces. Coach and coachee met weekly for nine months. Coachee reported each week on a minimum of 5 interactions as part of communication action plan. The goal was to have 4 out of 5 positive interactions with others.

Case Study #2

Associate for professional services firm

Results: At six months, coachee was able to achieve 4 out of 5 positive interactions, with increased awareness of the people coachee interacted with. At nine months, coachee regularly reported 5 out of 5 positive interactions.

Additionally, coachee increased skills around client development and relationship building. These skills included sustaining contact with clients with phone calls and emails, written thank you notes, and focusing on connecting contacts with others of value. These skills helped differentiate coachee and firm from other firms.

Case Study #3

Management Team for professional services firm

Situation: Managing partners for professional services firm engaged LEAD Executive Consulting to evaluate the status of the firm. Several months prior to engagement, an event occurred between the partners which was a source of distrust. Additionally, the team experienced symptoms of lack of commitment, avoidance of accountability, and fear of conflict. The team was advised of the results of the assessment and given recommendations for addressing the above issues (team building), as well as the creation of a firm Mission, Vision, and Core Values.

Action: The team met twice (4.5 and 5.5 hours) to participate in a customized conflict resolution intervention, and additional two times for Mission, Vision, Core Values creation.

Case Study #3

Management Team for professional services firm

Results: After first meeting, managing partners were ***open*** to making commitment to engage with each other. Additionally, they committed to open communication with each other, as well as accountability .

After the second meeting, the partners ***made*** the commitment, shared their upsets, resolved their differences, and were able to work together as a team to develop the Mission, Vision, and Core Values (in subsequent meetings).

During the second meeting, two partners acknowledged that they planned to leave the partnership, but the outcomes from the meetings changed their minds. All partners indicated their belief that the firm would have dissolved if it were not for the intervention.

Value Proposition

- ❖Research on executive coaching has shown an ROI of at least 5-6 times the investment.

Metrics Supporting Value Proposition

- The Coaching Impact Study: Measuring the Value of Executive Coaching, *International Journal of Coaching in Organizations*, 2006, Volume 4, Issue 3, pp. 8-26.
  - 25% of managers surveyed (N=12) indicated an 18 month post coaching value of $1,000,000+.
  - 30% of managers indicated no dollar value , 42% indicated less than $50,000 dollar value.
  - Over 90% of coachees (N=51) indicated a dollar value of over $50,000 was gained.

Metrics Supporting Value Proposition

- Maximizing the Impact of Executive Coaching: Behavioral Change, Organizational Outcomes, and Return on Investment, *The Manchester Review*, 2001, Volume 6, Number 1.
  - 43 of the participants averaged an ROI of $100,000 equating to 5.7 times the cost of coaching (conservative estimate and based on 1996-2000 data and dollars)
  - Tangible business impacts and frequency reported by executives: Productivity (53%), Quality (48%), Organizational Strength (48%),
    Customer Service (39%), Reduced Complaints (34%), Own Retention (32%), Cost Reductions (23%), Bottom Line Profitability (22%)

Executive Coaching Process: Driving Business Results

<u>Overview</u>

- Planning & Contracting
- Assessment
- Action Planning
- Ongoing Coaching
- Measurement
- Action Planning (if needed or requested)

Timing of executive coaching

- ❖Six, nine, or twelve months in duration
- ❖One and a half to two-hour sessions held weekly and usually in person; reviews what happened in previous week and explores upcoming week's needs
- ❖Weekly meetings leverage memory and emotions which can degrade and diminish effectiveness of discussions past 7 days.
- ❖Coach can be available for short calls outside of meetings

Coaching Tools

- ❖Individual and customized 360 assessments
- ❖Appreciative Inquiry
- ❖Use of neuroscience concepts to leverage change
- ❖Customized personal development plan
- ❖Weekly/bi-weekly high impact coaching sessions
- ❖Multiple research-supported behavior change models and techniques
- ❖Leadership development tools using books, articles, exercises, role modeling

Coaching Tools (Assessments used)

- Korn/Ferry Lominger Voices 360 (Certified)
- Korn/Ferry Lominger Leadership Architect (Certified)
- Korn/Ferry Lominger viaEdge (Certified)
- EQi 2.0 (Certified)
- EQ360 (Certified)
- Prosci ADKAR Change Model (Qualified)
- Myers Briggs Type Indicator -- MBTI (Qualified)
- Thomas Kilmann Conflict Mode Instrument (Qualified)
- FIRO-B (Qualified)
- CPI 260 (Qualified)
- Strong Interest Inventory (Qualified)
- Hamel Work Values Inventory (Qualified)
- Custom 360 Instrument (Developed In-house)

Recap: Coaching…

- ❖is a proactive and structured support that looks to the future, plans, and focuses on raising the bar through thoughtful guidance and accountability.
- ❖is for leaders in transition, leadership teams, high potentials, promoted executives, remedial assignments, targeted skill building, and developmental assignments.
- ❖results in a higher performing leader

Executive Coaching Process: Driving Business Results

- ❖Use "Helping Skills Model" by Gerard Egan
- ❖Three stages
  1. Current Scenario
  2. Preferred Scenario
  3. Action Strategies

Egan's Helping Skills Model

Current Scenario

- The Story
  (What's going on?)
- Blind Spots
  (What's *really* going on?)
- Leverage
  (Focusing/Prioritizing)

Preferred Scenario

- Possibilities
  (Brainstorming)
- Change Agenda
  (SMART Goals)
- Commitment
  (Check goals are right)

Action Strategies

- Possible Actions
  (How many ways are there?)
- Best Fit Strategies
  (What will work for me?)
- Plan
  (What next and when?)

Driving Business Results

Drive business results by regularly reviewing accountability :

- ❖Customized personal development plan (PDP) with measurable success outcomes for coaching areas
- ❖Action plan implementation reviews are done weekly to gauge progress towards PDP (Action Plan Tracking Form)
- ❖Behavioral changes sometimes require increasing awareness of coachee to situations which elicit negative behaviors (Behavioral Opportunity Form)

❖Sample forms follow…

Personal Development Plan: Driving Business Results

Action Plan Steps are placed on Action Plan Tracking Form used as weekly reporting; see next page for example

Name: John Doe **Date:** 12-31-2008

Important Notes

1. Target areas must be ***specific and measurable***.
   CORRECT: Increase positive feedback provided to peers by 20%.
   INCORRECT: Process patient requests better.
2. Action plan must be feasible / realistic.
3. Resources must be obtainable.
4. This is a partnership. Both sides must agree.
5. Schedule follow up meetings periodically to stay on track and focused.
6. Celebrate successes/accomplishments throughout the year.

Goals	Action Plan	Resources Needed	F/U Dates	Completed
Goal #1 Increase leadership role and visibility to Supervisors and staff by 20% * over the next 180 days * Supervisors from 3.55 to 4.26 and staff from 3.31 to 3.97	1. Improve overall level of feedback in a positive way (ask for advice and provide input) 2. Increase visibility each morning before 8:45 am in office and at reception desk on occasion 3. Take more proactive stance and offer new ideas, in areas such as cost savings, operations, and employee relations 4. Take proactive lead in office space decisions	1. Access to Supervisors, Professional Staff and staff 2. Broker access and related personnel 3. Create "Move Team"	3/31 6/31	
Goal #2 Increase strategic view to Supervisors by 20% * over the next 180 days * Supervisors from 3.0 to 3.6	1. Review and modify employee benefits (sick days, etc), as needed 2. Conduct survey of other firms' policies (Networking) 3. Review Partner Agency participation and its membership as prospective clients and present findings with recommendations (Marketing) 4. Review effective billing rates of top 25 clients, discuss trends and recommend changes in strategy for existing client base 5. Conduct review of firm competitors to gain insight into market penetration, practice areas, diversification, new trends, and growth and make recommendation 6. Recommend one-page report of key metrics for better management review of firm operations in a simple concise presentation; obtain approval from partners on key metrics (Score card)	1. Firm policies and procedures handbook 2. Survey outside law firms 3. Partner Agency website and member web pages 4. Various reports (rates, financials, client and Professional Staff information) 5. Website access to firm websites	3/31 6/31	
Goal #3 Increase the overall drive for results by 20% * in several specific areas * Supervisors from 3.58 to 4.22	1. Inspire and persuade others to achieve firm goals, such as time entry, business development, client relations and firm profitability 2. Create excitement with launching of new website and opportunity for new contributions by attorneys 3. Organize and lead the charge for the 2009 Firm Seminar 4. Conduct review of contracts with XXXXXXXXXXX, XXX, XXXXXXXX, and recommend any needed change in direction 5. Review and recommend support needs for the Section, firm expansion opportunities, revenue enhancement, and new practice areas to e-partners	1. Supervisors feedback regarding firm goals 2. Website design team, and create "Website Team" 3. Professional Staff input for firm seminar in 2009 4. Vendor contracts 5. Supervisors feedback	3/31 6/31	

Coachee, Coach, and Sponsor signs off on plan so there is clarity around goals and expectations.

Both of the parties, signing below, pledge to work together to ensure implementation of the action plan. Sponsor acknowledges and agrees with development plan.

Coachee Coach Sponsor

Action Plan Accountability: Driving Business Results

Action Plan Tracking Form used as weekly accountability with coach; gives a month at a glance on progress for coach/coachee; confidential form

Action Plan Tracking John Doe

Month/Year: Feb-2020		**Time Period**				
Item	**Needed Information**	**Week 1**	**Week 2**	**Week 3**	**Week 4**	**Week 5**
Dates of Week:		Date: 2/1/2020	Date:	Date:	Date:	Date:
Take more proactive stance and offer new ideas, in areas such as cost savings, operations, and employee relations	*Lists situation, ideas and areas; outcome.*					
Utilize presence at speaking engagements to develop new contacts.	*Document who met, what they do, what is plan for follow up.*					
Practice and use active listening with clients, engagement teams and partners.	*Document situations where used and outcome of situation.*					
Seek input from those directly involved in projects or discussions, obtain input of those involved but not contributing and seek out "experts."	*Document situation: who, what, when, where, how.*					
Set aside time each week to visit one-on-one with partners, managers and seniors in Dallas office outside of client engagement.	*Document who, when, subjects discussed.*					
Have lunch or visit with 1-2 different partners or managers each week outside of client engagements.	*Document who, when, subjects discussed.*					
Postpone decisions that do not need to be made right away.	*Document situation and outcome.*					
Complete the Behavior Accountability Chart weekly to evaluate anxiety provoking situations.	*Check off if completed.*					

Behavior Accountability: Driving Business Results (1/3)

Behavioral Opportunity Listing – Doe, John (CAO)
Week of 2-17-2020

Situation	Behavior	Result	Type (+/-)	Consequences	Comments	Feelings	Next Time
Includes date/time and what was happening immediately prior to event	What actions happened?	What was the result of the behavior	Was it a (+) or (-) result?	What were the resulting consequences?	What were nonverbal cues observed (in self or others)?	What feelings were going on inside when this happened?	What would you do differently next time?
02-17-2020 2:30pm I received a blog post over the weekend from the Ken Blanchard Companies titled "5 Stages of Distrust and How it Destroys Your Relationships". I thought of Beth and two of her employees who have been at odds for months, and whose behavior toward each other is making everyone within earshot miserable. Beth and I spoke about them on Friday and had discussed asking Sam to help her in leading some healing discussions.	I shared the article with Beth via email, suggesting that there might be some nuggets in it that could help start the healing between the two employees. Beth responded positively and said she would give it to Sam to use when she meets with the two employees. What I really wanted to tell Beth was that the article might also help HER, as a lack of trust between Beth and her staff has been a big topic of discussion in my meetings with her staff. And, I was disappointed that Beth seems to have thrown in the towel and is putting this situation on Sam to resolve.	I have been at war with Beth all week - a silent war since I haven't said anything to her about it.	-	I've surely missed opportunities to bring this back up with her but have avoided initiating a conversation.	Tension; avoiding Beth.	A little bit of dread for the time when I know we'll have to have the conversation. Frustration at not feeling better equipped to have a constructive dialogue with Beth about the issue of trust. Guilty that I'm somewhere in all the "5 Stages..." with just about everyone here.	Be stronger in my conviction of having the difficult conversation with Beth with an "outward mindset." Evaluate what stage of distrust I am displaying with Beth and try to reverse that stage.

Behavioral Opportunity Form provides opportunities for discussion around triggers and decision making for optimizing successful behaviors while increasing emotional intelligence.
This is a confidential form and not shared with anyone.

Behavior Accountability: Driving Business Results (2/3)

Behavioral Opportunity Listing – Doe, John (CAO) **Week of** 2-17-2020							
Situation	**Behavior**	**Result**	**Type (+/-)**	**Consequences**	**Comments**	**Feelings**	**Next Time**
Includes date/time and what was happening immediately prior to event	What actions happened?	What was the result of the behavior	Was it a (+) or (-) result?	What were the resulting consequences?	What were nonverbal cues observed (in self or others)?	What feelings were going on inside when this happened?	What would you do differently next time?
2-18-2019 9:00am I've been asked to co-chair a committee to develop an education program. This morning was our regularly scheduled committee call - today's purpose was to review the curriculum and finalize development assignments. I had taken on the task of organizing the material and posting changes and comments from the group into a master list.	The other committee chair was unable to join the call, so I opened the discussion and asked for updates from each member. Once we made the round of updates, I asked several questions I had prepared that were aimed at helping to clarify our next steps, and everyone's role in the development and presentation of the material. In preparing the questions, I focused on words that would elicit discussion, avoiding any direct statements and yes/no questions.	This was one of our most productive calls to date. All participants were engaged and contributed to the discussion. We were able to make real headway in our preparation, and the attendees really seemed to sense that we were beginning to click as a group. Because I was prepared with questions, I asked them in such a way to elicit the most discussion, and I made good use of everyone's time.	+	As a group we took a big step in the project, and everyone agreed that our timeline was realistic. My investment in preparation made for a very productive meeting.	Laughing, relaxed.	Pleased that I was able to contribute to the group without feeling the need to 1) do all the talking and 2) be directive.	Nothing.

Behavior Accountability: Driving Business Results (3/3)

Behavioral Opportunity Listing – Doe, John (CAO)
Week of 2-17-2020

Situation	Behavior	Result	Type (+/-)	Consequences	Comments	Feelings	Next Time
Includes date/time and what was happening immediately prior to event	What actions happened?	What was the result of the behavior	Was it a (+) or (-) result?	What were the resulting consequences?	What were nonverbal cues observed (in self or others)?	What feelings were going on inside when this happened?	What would you do differently next time?
02-20-2020 11:30am Beth sent a group email to Jon, Martin and me to solicit possible dates to meet and discuss Terri. Not a lot of explanation in the email – just that we're continuing to have issues with Terri and discipline seems inevitable.	Jon (CEO) came into my office and asked if I saw the email from Beth. I told him I did and started to tell him about my conversation with her the day before. I didn't really get a chance. Jon was very concerned that Martin would see this meeting and the reason for it as another instance of Beth not giving the salespeople a fair chance and just the next step in running the last of them off. He said he thought we (Jon, Martin, Beth, me) were going to get together to discuss Martin's concerns and to make sure he feels like he made a good decision in coming here. Jon didn't give me much of a chance to explain but when he finally did, I went into defensive mode-explaining that I was the one who coached Beth in her approach to the meeting about Terri. I didn't acknowledge his concerns because I wasn't really taking them in. I was just waiting for him to stop talking so I could.	I had to work to get the conversation back on track. I could tell that we both had the same concerns for handling things with Martin, but we seemed at odds over how to approach it. I was finally able to assure Jon that I was working with Beth on her approach with Martin, and that she is aware there is some fence-mending to do with him. I knew Beth was going to email us all.	-	Jon and I were out of sync, doing the dance of high emotions before getting to a good place where we were communicating well again.	Jon: kind of red-faced, tense. Me: wide-eyed, surprised at his assertive stance.	Uh-oh. I could have done this differently and saved us both some wasted effort.	I could have alerted Jon to my discussion with her so that he didn't draw the wrong conclusion about the reason for it, or the intended approach with Martin.

Differentiators

- ❖Use an evidence-based practice: processes used are based on research proven techniques for sustained behavior change
- ❖Use of appreciative inquiry vs. telling or advising: increases sustainability of behavior change
- ❖Personal development plan has measureable outcomes, customized to the individual, and related to the business' strategies/goals

Contact for more information

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