



Stakeholder Centered Coaching  
by Marshall Goldsmith

Guaranteed & Measurable  
Leadership Growth

# Stakeholder Centered Coaching

Mini-Survey Feedback

For

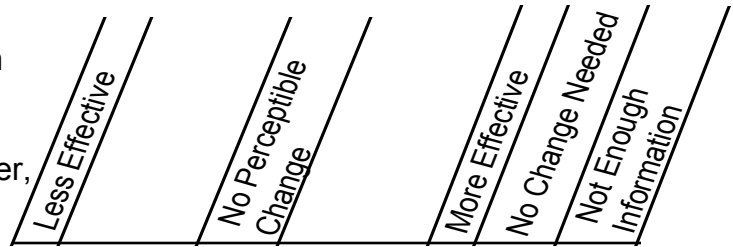
Jeff Breen  
SVP Sales

**The After Action Review (AAR) is at the end of the mini survey and the written comments from stakeholders. The AAR was written by Jeff himself. It is his story.**



Do you believe Jeff has become more (or less) effective *since the start of this coaching process* on these leadership skills?

**Report Codes are as follows: S=Self, M=Manager, DR=Direct Report, and PC=Peer/Colleague.**



			-3	-2	-1	0	+1	+2	+3		
MS#1	1. Is building trust	<b>DR</b>	1	1	1		4	3			
		<b>PC</b>					1	1			
		<b>M</b>					1				
		<b>S</b>						1			
MS#	1. Is building trust	<b>DR/PC</b>				2	2	4	3		
		<b>M</b>						1			
		<b>S</b>							1		

- Follows through on commitments and not over commit
- Ensures that intentions, goals and priorities are clear
- Eliminates one-off conversations with individual or subsets of my direct reports; provide more frequent team updates/calls
- Is more responsive to email and voicemail
- Resolves open issues on a timely basis
- Is on time for meetings and conference calls
- Sets aside time every day to respond to email; is available/accessible to the team

MS#1	2. Is focusing (Clarity and Time Management)	<b>DR</b>		2	1		4	3			
		<b>PC</b>					1	1			
		<b>M</b>					1				
		<b>S</b>						1			
MS#2	2. Is focusing (Clarity and Time Management)	<b>DR/PC</b>				2	3	4	3		
		<b>M</b>						1			
		<b>S</b>						1			

- Clearly articulates Goals, Priorities and Strategies
- Clearly define what key objectives are and makes the whole team aware
- Articulates key initiatives and remain laser focused on those initiatives; develops actions plans as needed
- Is selective when it comes to what he works on; prioritize each day and week
- Ensures everyone has role clarity; eliminates ambiguity
- Delegates more effectively
- Responsiveness to email / avoids the midnight email

Response and Follow-Up		
Has Jeff talked with you about his stated	MS #1	YES = S, M, 9DR, 2PC NO = DR



goals?	<b>MS #2</b>	<b>YES = S, M, 11DR/PC</b>	<b>NO = 0</b>
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To what extent has Jeff followed-up with you on the areas that he has committed to improve?	<b>MS#1</b>		No Perceptible Follow-Up
		<b>DR</b>	Little Follow-Up
		<b>S, M, 7DR, 2PC</b>	Some Follow-Up
		<b>2DR</b>	Consistent (Periodic) Follow-Up
	<b>MS#2</b>		No Perceptible Follow-Up
		<b>DR</b>	Little Follow-Up
		<b>S, M, 5DR/PC</b>	Some Follow-Up
		<b>5DR/PC</b>	Consistent (Periodic) Follow-Up

**Additional comments/suggestions for Jeff's consideration ...**

**What specifically has Jeff done to improve that you want to acknowledge and reinforce?**

<b>MiniSurvey #1</b>	<b>Mini-Survey #2</b>
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**Manager**

<ul style="list-style-type: none"> <li>As mentioned above, responsiveness to email's been better and late night/midnight emails have gone down.</li> <li>He has been more responsive to email and VM.</li> <li>Jeff's been much more prompt to meetings/conf calls. If he's not, he's been much better at letting others know.</li> </ul>	<ul style="list-style-type: none"> <li>Jeff has kept up his responsiveness to emails and has been more prompt to meetings/calls. In situations where he's late, he has heightened his awareness and made attempts to let others know.</li> <li>Jeff is definitely more conscious of one off conversations with any individuals, and I'm hearing less about this issue from others.</li> <li>Late night emails have definitely stopped.</li> </ul>
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**Direct Reports & Peer/Colleagues**

<ul style="list-style-type: none"> <li>Allows an open forum for the team to discuss what's on their mind and provide input</li> <li>be more of an advocate for team – challenge the XYZ system if does not make sense for ABC</li> <li>Better at delegating</li> <li>Better organized</li> <li>Consistent with one-on-one calls.</li> <li>Focus has increased.</li> <li>He is very aware of communicating to the group, not doing so many one-offs</li> <li>he talks a LOT more</li> <li>I believe he's really trying to improve building trust – trying to get team to come together/become united</li> <li>Jeff does seem to follow up on his stated goals however the manner in which he talks about his stated goals is very similar to a bully in that he makes it so uncomfortable to provide him feedback I just</li> </ul>	<ul style="list-style-type: none"> <li>Better at keeping everyone in the loop</li> <li>Continues to stay positive and tries to put a positive spin on things</li> <li>He has said to text him if we have to find him immediately and he DOES respond.</li> <li>He is more responsive to email when traveling.</li> <li>He is very aware of his personal growth plans and references frequently</li> <li>He stopped sending nocturnal emails. 😊</li> <li>Held to communication commitments and timelines when</li> </ul>
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<p>tell him what he wants to hear.</p> <ul style="list-style-type: none"> <li>• Making effort to stick to topics in calls – more organization</li> <li>• More available</li> <li>• More group conversations, less one-off conversations</li> <li>• Noticed early improvement in time management/email response but starting to slip again</li> <li>• Ref Item #1 Above: 1.1 not all the time; 1.2 no clear priorities and goals; 1.3 still has many one-off calls and does not include entire team in discussions; 1.4 is better than before; 1.5 still does not execute on open issues and focus on priorities; 1.6 better; 1.7 somewhat</li> <li>• Ref Item #2 Above: 2.1 not clear focus or strategy for goals and objectives; 2.2 not clear and team and communication divided; 2.3 no laser focus or action plan; 2.4 sales teams has no idea what he does all day---always busy but what is outcome---what is he working on to help our team; 2.5 much ambiguity of roles, vision and inclusion of all team members; 2.6 does not delegate well and/or manage direct reports well—no follow-up or execution of discussion or plans; 2.7 better</li> <li>• Responding to phone calls/most emails timely and always to texts</li> <li>• Scheduled weekly sales team meetings with agendas to provide a forum for consistent messages</li> <li>• Tries to focus calls so that the time spent is meaningful</li> <li>• Trying to delegate or at least recognizing the need.</li> </ul>	<p>partnering on issues</p> <ul style="list-style-type: none"> <li>• Jeff has been a partner in working case issues via open conversations/dialogues</li> <li>• Jeff is trying but still lack of vision and execution</li> <li>• Made tremendous effort to improve follow up and scope of commitments</li> <li>• Manages time and calls</li> <li>• More on time for meetings</li> <li>• No consistent message, strategy and sales effort</li> <li>• Resolved open issues quicker</li> <li>• Responsiveness</li> <li>• Still unclear as what is Jeff’s role and his ability to help us sell---what is his value add to sales?</li> <li>• Tries to make each interaction meaningful and valuable</li> <li>• Trying to reach out more consistently</li> </ul>
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**Peers/Colleagues**

<ul style="list-style-type: none"> <li>• Better overall communicator (listens, acknowledges alternate viewpoints, etc.)</li> <li>• Follows up on communications better (emails, voicemail) (still room for more improvement)</li> </ul>	
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**What suggestions (feedforward) can you provide to Jeff moving forward to improve even more?**

**Manager**

<ul style="list-style-type: none"> <li>• I’d like to see Jeff be more laser focus on key initiatives and develop actions plans to support them.</li> <li>• I’d like to see Jeff delegate more effectively. May need a better resource he can work with.</li> <li>• Maybe tied to the delegation comment above, but I’d like to see Jeff be more selective or set realistic priorities on his commitments so he can follow up in more timely manner.</li> </ul>	<ul style="list-style-type: none"> <li>• Delegation is still a challenge for Jeff. I understand the resource constraint he’s faced today, but higher priority needs to be set to address the issue.</li> <li>• Jeff will need to plan and manage his time even more carefully with his added responsibilities and meetings/travels he has to do with his dotted line reporting structure to Harry.</li> </ul>
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**Direct Reports & Peer/Colleagues**

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| <ul style="list-style-type: none"> <li>• Be less ambitious about what you want to accomplish during the weekly call – less is more</li> <li>• Breathe</li> <li>• Build in more “consideration” time to think about big picture things. Schedule it if needed.</li> <li>• Consider making sales team calls every other week</li> <li>• Continue to focus clearly through to a result.</li> <li>• Continue to tie in to our XYZ partners</li> <li>• control conversations, assume responsibility in meetings and with decisions. There is too much vacillating and bureaucracy getting in the way</li> <li>• Don’t assume everyone has the same information for a starting point. We are all in different locations and traveling. We sometimes hear things in different ways and from different people.</li> <li>• Execution – follow through with action plans</li> <li>• Keep team focus, informed and motivated by consistent communications and meetings.</li> <li>• lead with a plan (finalized) not a half plan that we (or XYZ) need to complete for him</li> <li>• less hindrance, more thought/action for sales results (not more words that don’t have finite direction)</li> <li>• Less talking in all aspects of interaction with Jeff (1:1s, weekly calls, in-person meetings, etc.) and more true action on his part would be great.</li> <li>• Need to be clear and concise re our goals and objectives, develop strategy and sales plan</li> <li>• Need to communicate to entire team, not one-off conversations</li> <li>• Need to execute and prioritize projects</li> <li>• Review possible meetings and prioritize.</li> <li>• The sales team seems hesitant to talk on the weekly calls, perhaps topics can be identified from the one on one calls with the team members and placed on the agenda for sharing</li> </ul> | <ul style="list-style-type: none"> <li>• Allow people to do their jobs and don’t insert himself where he’s not necessarily needed.</li> <li>• Articulate vision, strategy and steps we are taking to get there</li> <li>• Continue transition from referencing plans to just acting on them</li> <li>• He has spent so much time bringing his team together that he now needs to be more proactive cross departmentally.</li> <li>• He knew the sales numbers would be less than in prior years and has not listened to RC and SC that the deals through Advisors are going to be much smaller but continues to ask where are the larger deals. We cant get to because we have this new model to go through advisors. Listen to those in the field</li> <li>• He needs to advocate for SCs and RCs but he cannot forget the people who make it happen beyond those folks.</li> <li>• Keep focusing on role clarity</li> <li>• More dialogue about where we are in attaining our team goals (not just financial goals)</li> <li>• Needs to communicate urgency to other department leaders relative to service issues for the RC and SC, ie, not acceptable that nobody responds for a day to updated pricing requests etc.</li> <li>• Take a step back and stop micro-managing</li> <li>• We are past the restructure and things are falling in to place. Now need to focus more on XYZ integration (and is). Reporting in to Harry has been a brilliant change and helpful here.</li> <li>• What is our target mkt?</li> <li>• Who is responsible for each step of sales and mkting strategy? Is it MTBG, XYZ?</li> </ul> |
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**Is there any other information you would like Jeff to consider?**

**Manager**

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| <ul style="list-style-type: none"> <li>• Overall there’s been good progress, but I am starting to see some of the old behaviors/action item areas he improved are started to resurface. Need to keep his discipline in the areas of his focus where we’re</li> </ul> | <ul style="list-style-type: none"> <li>• Overall more progress has been made since the last mini-survey in Feb. Most important feedbacks I have received were from others vs. my own experience. I’m hearing from others that</li> </ul> |
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seeing improvements, so they can be maintained and continue to improve.

areas Jeff's been working on have improved.

### Direct Reports

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| <ul style="list-style-type: none"> <li>• Be better at keeping your managers updated. Don't assume they always share information.</li> <li>• Be proactive in initiatives vs. reactive</li> <li>• Jeff needs to realize that unless he is talking to a select few on the Steering Committee, most conversations he has are repeated to others. These could be conversations with the sales team, management, outside partners, insurance carrier representatives, etc. The information people pass on is amazing and with the social media today, it is starting to show up everywhere and I am sure half the time not correct by the time it is passed to the 2nd, 3rd, 4th person.</li> <li>• Keep up the good work</li> <li>• stop trying so hard – it doesn't feel genuine</li> </ul> | <ul style="list-style-type: none"> <li>• Allow people to help him more. He is delegating more but could improve. This is called "be careful what you ask for". ☺.</li> <li>• Jeff needs to stand up to some of these outside partners and stay firm at 50/50 split. Don't give in</li> <li>• need to revamp the sales force reporting</li> <li>• Needs to change his team---does not receive proper support from his co-sales mgt team or MTBG Corporate</li> <li>• Stay the course, don't fall back into old habits.</li> <li>• The one on ones are important. We need to stay on top of them.</li> </ul> |
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### Peers/Colleagues

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|---|--|
| <ul style="list-style-type: none"> <li>• From a sales perspective – where is the focus? DI? COLI? Financial Partners or Independent Consultants? Or Internal Sales? Or is it let shit fly and see what sticks? Don't know and haven't seen a consolidated sales strategy – and things change from time to time. All of a sudden we have a renewed focus on "existing client add ons". Why is this?</li> <li>• He also focuses on a lot of other things related to the organization (sales, technology infrastructure). While he is a valued resource in this area – HE REALLY NEEDS TO DECIDE WHAT HE IS GOING TO FOCUS ON. We know he is challenged with resources and his ability to follow up and communicate. If you have limited resources, as a leader, he must find a way to effectively manage them. If he is better for this organization in a strategic role, then do something now, otherwise sales will (continue to) suffer.</li> <li>• He has a tough job, but he's in that role and the company is relying on his skills heavily.</li> <li>• He still needs to make a better connection with ALL stakeholders, especially his sales team (RCs and Consultants). I think there is still a bridge/ cap that needs to be narrowed between their viewpoints and his. I do not believe he has earned the trust/ respect of the sales team and if he can't do that, then we will not be successful in sales.</li> <li>• Still needs to be more clear about his overall objectives. Yes, he in charge of sales. Yes, he is focused on sales. Does he plan on achieving his goals? If so, what is his strategy?</li> </ul> |  |
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For our time together today...

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### Mini Survey After Action Report

#### **What did I set out to do?**

1. Build trust, improve clarity and time management

#### **What actually happened?**

2. Identified 16 stakeholders
3. Gathered suggestion and input from all my stakeholders
4. Built an action plan based on stakeholder feedback
5. Plan addressed the following:
  1. Follows through on commitments and not over commit
  2. Ensures that intentions, goals and priorities are clear
  3. Eliminates one-off conversations with individual or subsets of my direct reports; provide more frequent team updates/calls
  4. Be more responsive to email and voicemail
  5. Resolves open issues on a timely basis
  6. Be on time for meetings and conference calls
  7. Sets aside time every day to respond to email; be available/accessible to the team
  1. Clearly articulates Goals, Priorities and Strategies
  2. Clearly define what key objectives are and makes the whole team aware
  3. Articulates key initiatives and remain laser focused on those initiatives; develops actions plans as needed
  4. Is selective when it comes to what he works on; prioritize each day and week
  5. Ensures everyone has role clarity; eliminates ambiguity
  6. Delegates more effectively
  7. Responsiveness to email / avoids the midnight email
6. Asked for feedback throughout (albeit, not as consistently as I would have liked with everyone)
7. First min-survey
  1. 13 responses
  2. 77% saw significantly more effectiveness
  3. Results – here are some positive comments that people provided:
    1. Allows an open forum for the team to discuss what's on their mind and provide input
    2. Better at delegating and better organized
    3. Better overall communicator (listens, acknowledges alternate viewpoints, etc.)
    4. Consistent with one-on-one calls.
    5. Focus has increased.
    6. Follows up on communications better (emails, voicemail) (still room for more improvement)
    7. He is very aware of communicating to the group, not doing so many one-offs
    8. he talks a LOT more
    9. I believe he's really trying to improve building trust – trying to get team to come together/become united

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10. Making effort to stick to topics in calls – more organization
11. More available
4. Results – here are some constructive comments that people provided:
  1. Continue to focus clearly through to a result.
  2. Don't assume everyone has the same information for a starting point. We are all in different locations and traveling. We sometimes hear things in different ways and from different people.
  3. Execution – follow through with action plans
  4. Keep team focus, informed and motivated by consistent communications and meetings.
  5. lead with a plan (finalized) not a half plan that we (or XYZ) need to complete for him
  6. less hindrance, more thought/action for sales results (not more words that don't have finite direction)
  7. Less talking in all aspects of interaction with Jeff (1:1s, weekly calls, in-person meetings, etc.) and more true action on his part would be great.
  8. Need to be clear and concise re our goals and objectives, develop strategy and sales plan
8. **Second min-survey**
  1. 12 Responses
  2. 80% saw significantly more effectiveness
  3. Observations on the numerical ratings provided
    1. In the first survey, on a scale of -3 to +3, my average score/rating for both categories was just shy of a +1. In the second survey, my average score/rating for building trust was a +2.8 and focus received a +2.1.
    2. In terms of my follow up with stakeholders: where most had experience “little” to “some” follow up in the first survey, the ratings improved to reflect a mix of “some” to “consistent” follow up in the second survey.
  4. Results – here are some positive comments that people provided:
    1. Jeff has kept up his responsiveness to emails and has been more prompt to meetings/calls. In situations where he's late, he has heightened his awareness and made attempts to let others know.
    2. Better at keeping everyone in the loop
    3. Continues to stay positive
    4. He is more responsive to email when traveling
    5. Met commitments when partnering on issues
    6. Been a good partner in working through issues
    7. Resolves open issues quicker
    8. Trying to reach out more
    9. Stay the course and keep doing what I'm doing (don't slip)
  5. Results – here are some constructive comments that people provided:
    1. Delegation is still an issue – Jeff lacks resources to delegate to and this should be addressed
    2. Articulate vision, strategy and steps to get there

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3. Keep focusing on role clarity
4. The one-on-one's are important and valuable
5. Stay the course and keep doing what I'm doing (don't slip)

### What insights have I gotten?

9. Delegating has been an issue. I have made some improvement, and often refer to this coaching plan when I do so, but more can be done.
10. Still challenged with being responsiveness to the volume of demands but appreciate the stakeholder view that this has improved.
11. I do feel as though communication has improved with my stakeholders. Everyone on the team is very busy and I can't allow tasks to supersede effective communications. Often, the busier I get, the more I focus on tasks or projects. I need to continue to manage that by delegating and not over-committing.
12. When tasks and projects are piling up, I often find that my focus when dealing with colleagues becomes the task or project at hand. **While that's bound to happen, I've seen great benefit from asking for feedback from everyone around me. I need to continue doing that. This coaching plan has shown just how impactful humility and an open-minded approach can be. I'll take with me well beyond the coaching with Chris.**
13. Changing my own behavior is not easy, especially when my day fills up with meetings and I'm playing catch up but the coaching plan has become part of my thought process DNA and I know I'll carry with me. The coaching has been invaluable. Thanks Chris and thanks to everyone who pushed me to do this.
14. My goal going forward will be to
  - (1) To remain diligent in applying what I've done here with this coaching plan
    1. To continue to look for opportunities to delegate
    2. And to better articulate the sales strategy, priorities, and progress

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