



Stakeholder Centered Coaching  
by Marshall Goldsmith

Guaranteed & Measurable  
Leadership Growth

# Stakeholder Centered Coaching

Mini-Survey Report

For

Jerry Rosy  
General Manager

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

## Mini-Survey Feedback Report for Jerry

*Less Effective*      *No Perceptible Change*      *More Effective*  
*No Change Needed*  
*Not Enough Information*

	-3	-2	-1	0	+1	+2	+3	+3	NI
1. Is building trust across Divisional / Departmental lines .....				1		5	4		
Self & Manager						M	S		
2. Collaborates effectively .....				1	1	3	5		
Self & Manager							S M		

Response and Follow-Up		
Has Jerry talked with you about his stated goals?	YES = 7, S	NO = 3

To what extent has Jerry followed-up with you on the areas that he has committed to improve?		No Perceptible Follow-Up
	2	Little Follow-Up
	S, M, 4	Some Follow-Up
	4	Consistent (Periodic) Follow-Up

Please provide additional comments/suggestions for Jerry's consideration ...

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

- Jerry has made an effort to work with PLCA and ITPA Operations
- Jerry appears to be very committed to his development and is making very noticeable effort. I believe he is asking better questions and working to elicit input and feedback from others in work related and with his personal development.
- Jerry had also encouraged my participation in his Superpool meetings to give me a greater understanding of processes. I was recently invited and participated in the NCR Strategic planning session which was very enlightening. That process was very helpful for me in managing my JPA's.
- Jerry is making more of an effort to reach out to others to solicit input on issues that impact other departments
- Jerry seems more open to opposing viewpoints.
- Has shared ideas that would lead to improved service and retention
- He provides more time and opportunity for others to provide input than in the past.
- He has, sporadically, made attempts at collaboration

- I also asked that Jerry be more collaborative in my marketing efforts and he has taken the time to work with me on presenting product offerings.
- I see him, in the meetings that I attend with him more patient and tolerant than in the past
- I've personally seen Jerry demonstrate more patience and restraint where in the past he would have engaged in negative chatter or deconstructive behavior. I am proud of the work Jerry is putting into this process so far.
- I've seen Jerry ask others for their thoughts and ideas on issues prior to Jerry providing his thoughts, whereas in the past, Jerry would have voiced his thoughts first, which often over powered and/or intimidated others and prohibited them from wanting to contribute.
- In my initial evaluation, I asked that Jerry have higher visibility in my territory as the Superpool manager and he has answered the bell in assisting me in my prospecting of new accounts.
- More emphasis on explorative questions
- Seeks to validate thoughts and ideas of others
- Seems more tolerant of others.
- Seems more willing to listen.
- Seems to try to understand the "other side"
- Slow to speak, patient to understand

What suggestions (feedforward) can you provide to Jerry moving forward to improve even more?

- Be consistent in collaborative efforts – not just when it looks good
- be honest
- Become even more tolerant with day to day interactions with others whether or not you agree
- Bestow more of his knowledge on JPA management and take a more proactive mentoring role. He has extensive knowledge in JPA management
- Continue to improve listening skills – think before you react
- Continue to share ideas
- deal with issues. Believe what you are learning through coaching. Don't say one thing and do something else. We see through it.
- don't continue to talk behind peoples back
- Extend his improvements company-wide even to departments he does not work with or with which he has limited involvement
- Jerry can be more of a facilitator within the super pool dept in terms of effecting positive changes in the way super pools interact with PLCA and iST.
- Jerry you are putting forth great effort and I commend you for the work you are doing. However, regardless of your work, you cannot force someone to trust you. Trust must be and will be earned over time, though a great step towards earning someone's trust is to trust them first. I believe there are still situations where you and the other party acknowledge each other's efforts, though still don't genuinely trust one another or are waiting for the other person to demonstrate trust first. Being genuine and authentic towards your peers is a great way to build trust. My recommendation is to go into this, forget the past and automatically trust someone until they do something to lose the right to be trusted.
- He should be consistent with his messaging – not say different things to different people
- I am close to Jerry and he opens up and shares many things with me, such as his development, challenges and frustrations. I encourage Jerry to do the same with others with non-transactional work items such as his

development plan, rather than wait for a formal survey to be circulated to elicit feedback. I believe by Jerry continuing to show his vulnerability, this will help build trust with his peers

- Keep up the good work.
- Stay on track with understanding that others are not always wrong
- Stop trying to manipulate things behind the scene
- Work towards establishing correct relationship between departments, then uphold and respect interaction

Is there any other information you would like Jerry to consider?

- Consider making a goal for super Pool Dept to improve overall interaction with other departments within company, specifically PLCA and iST. Hold super pool staff accountable for making necessary changes.
- Evaluate success of goal by polling PLCA/iST for feedback.
- I think Jerry is on the right track and he is much more engaged and supportive of my efforts as a producer and he has made an effort to remain engaged and would like him to continue in his efforts and not stop once this process is over.
- John may not be as supportive as Sean in wanting Jerry to change
- Keep up the work you are doing, though it will not be the tactical things that you accomplish that will change your relationships with others. Everyone knows you are brilliant within our industry, though it will be through your genuine and authentic interactions and trusting of others that will enable others to trust you.
- None

## 1. What did I want to accomplish?

Build Trust Across Departmental/Divisional Lines by:

- \_ Keeping an open mind to other points of view
- \_ Focused communication
- \_ Promoting PLCA
- \_ Use fact based statements
- \_ Respect other peoples point of view

Collaborate Effectively by:

- \_ Listening more
- \_ Encouraging others' input on issues
- \_ Suggesting rather than ordering
- \_ Asking for feedback
- \_ Meeting regularly with other departments
- \_ Sharing my experience openly and honestly

## 2. What Actually Happened and Why?

a. After analyzing the feedback from a number of colleagues, I selected ten stakeholders to assist me in reaching my stated goals in conjunction with my regular coaching sessions. **At first I found some of the stakeholders to be very skeptical of my intentions and I believe played along**, while the majority could see I was making the effort using the tools provided to me by Chris. For the most part, I used the **daily checklist** developed by Chris to keep me focused on my goals. While this was **initially a drag, now I see how powerful a tool it can be**. It was important for me to also have access to Chris when needed and at short notice, which happened even when he was overseas on trips he made sure I could contact him. During this period I interacted more with those stakeholders I felt were the skeptics, while still respecting the input of the others.

b. During the process Chris conducted two blind mini-surveys with the stakeholders in order to determine how they felt my commitment was progressing. **I was pleased to note on the initial survey only two stakeholders still held negative perceptions that I had in fact deteriorated while the other stakeholders all noted improvement**. The second mini-survey on the other hand showed all stakeholders had moved into the neutral or positive change areas. The difference between the two surveys' average was: i) **1.4 & 1.5 and ii) 2.2 & 2.3 on my two goals**.

c. Thanks to the support and commitment of Sean , Suzanne and the firm, I have been able to better understand certain dynamics in my life with the engaging of Chris to coach and mentor me through the past year or so. With the new skills he has taught me, it has not only enabled me to successfully complete what I set out to do, it has allowed me to use those skills within my department working with Doug Ross. Although I have not gotten Doug to the level a person of Chris' experience would, I have made progress. **It makes me wonder if the likes of R, M, G and G were collaborating at a high level what value that would bring the firm**. The firm's investment in me has paid off in my mind. I have been able to apply the lessons learned in Steering and other internal committee meetings. **For example I learnt the power of thoughtfulness, clarity and words have meanings to be of tremendous help during my depositions for the firm**. It is my intention moving forward to continue to hone the skills, behaviors and interactions taught to me by Chris. I believe his methodology/program may be something the firm should look at on a broader front.

d. As respects the stakeholders, initially I felt some reticence on some of their parts that I was actually committed to being coached and achieving my goals of building trust and being collaborative. **What a pleasure it is to provide some of the comments/observations made by both stakeholders and other employees:**

\_ Dave told me Trina and Marco had complimented me on my interactions with them

\_ Arlene. It is a pleasure to deal with you these days

\_ Sharon . I have noted a change in you; you seem easier to talk to

**\_ Tara. Initially acknowledged positive improvement in my attitude and behavior towards all. She has since congratulated me on the great strides I have made interacting with iTPA and PLCA in particular**

\_ Dave. Making a big effort to be involved in making things happen. Had heard

very positive feedback from Tara and Steve

**\_ I apologized to my son for interrupting him and he told me he had noticed a difference in our relationship for the positive.**

\_ There are more similar comments as those above in the mini-survey.

\_ Due to this investment the company made in me, I have become less defensive and more open with my colleagues and friends which in turn has made life more enjoyable overall

### **3. What am I going to do moving forward to maximize this investment of time and money in me.?**

Going forward I will continue to use the new methods and tools I have acquired in my personal interactions, more specifically continue to hone the following:

- Listen carefully without interrupting
- Suggest a course of action rather than dictate one
- Mastering the difference between dialogue and debate
- Aligning relationship quality with the importance of the issue/problem
- Incorporate the 360 feedback provided by CORE Advisors
- Continue to eliminate the use of but or however in my communications, both written and Verbal
- As a part of my legacy, use what I have learned to help ingrain these methods/processes within K
- Implement more of this into my personal life

**Although when I first started this program I had a negative attitude, at the present time, I realize that thanks to the firm and Chris' coaching I was saved from a possible career setback and overall found the experience to be rewarding in many ways: a happier life, stronger relationships (both internally and externally), better negotiating skills and more. I am committed to continue with this program's concepts and values because I believe in it and I've seen the positive results for me and the firm.**

**Again,** thank you Sean and Suzanne for providing me with this opportunity.

Sincerely,  
Jerry Rosy