Stakeholder Centered Coaching
by Marshall Goldsmith

Guaranteed & Measurable
Leadership Growth

Stakeholder Centered Coaching

Mini-Survey Report

For

Kerry Peters
VP

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

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Do you believe Kerry 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, **SC/P=**Senior Colleague and Peer (combined reporting).

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

		-3	-2	-1	0	+1	+2	+3		
MS#1	1. Collaborates in order to drive consensus decision-making **DR**					2	3			
	SC/P					1	2	2		
	M							1		
	S						1			
	Listens thoughtfully to the views and recommendations of others									
	Listens to different points of view with an open mind before giving own opinion									
	Asks questions to ensure understanding of someone's recommendation or suggestion									
	Get input from affected parties when decisions have a ripple effect									
	Builds off of what she agrees with before what she disagrees with									
	Looks for opportunities to build off of other's ideas									
	Establishes clarity on the desired result up front with the intention to create a mutually beneficial outcome									
	Establishes ground rules, defines success, resources that are needed, level of involvement for each party, and what to do if consensus/agreement can't be reached									
	Is more aware of her choice of words, tone of voice, body language, and the impact it is having on the conversation									
	Spends more time pondering email responses. When time is of the essence a quick, focused response may be appropriate. There are other times when a well-thought-out comprehensive message is needed.									
	Is more aware of the impact her verbal and written communication is having									
	Summarizes conversations to ensure clarity									
	Asks for feedback and suggestions on a regular basis									

		Less Effective			No Perceptible Change			More Effective	No Change Needed	Not Enough Information
		-3	-2	-1	0	+1	+2	+3		
MS#1	2. Delegates tasks appropriately to her team for the purpose of focusing on what's most important to manage her time constructively and effectively **DR**					2	2	1		
	SC/P				1	1	1			2
	M						1			
	S						1			
	Uses the phone, email, and face to face communication based on the needs of the situation									
	Asks self, if this is something she should be doing or delegated to somebody on her team									
	Is seen more as a manager/partner/coach than just a doer									
	Provides honest timely feedback on what went well and what could be improved									
	Looks for ways to empower team members by providing levels of autonomy they are ready to handle									
	Sets developmental objectives for each of her direct reports as to what they should focus on to help provide the opportunities they want									
	Negotiates up front her availability to team members as more autonomy is provided									
	Manages and develops relationships with the NJ team									
	Makes time for fun!!: For example: including the team on the CREW Golf event, etc. including everyone should build rapport and make everyone want to work harder/smarter for the team in a common goal									

Response and Follow-Up		
Has Kerry talked with you about her stated goals?	**YES = S*, M, 5DR, 3SC/P**	**NO = SC/P**

* (some of them)

To what extent has Kerry followed-up with you on the areas that she has committed to improve?	**SC/P**	No Perceptible Follow-Up
	S ,3 DR	Little Follow-Up
	DR, 4SC/P	Some Follow-Up
	M, DR	Consistent (Periodic) Follow-Up

Additional comments/suggestions for Kerry's consideration …

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

Direct Reports

- Asks questions to ensure understanding of someone's recommendation or suggestion
- Building Consensus across teams. Kerry did a great job working with members outside of her immediate team to generate a cohesive group response on the property management issues at One Pacific Plaza
- Delegation – During a leasing call on Sorrento Towers, Kerry let Dan run the meeting /make decisions even when the brokers directly asked her for information. She delegated/deferred to Dan.
- Kerry is being more thoughtful about her style of communication and when it's appropriate to talk through something rather than rely on email. This is helpful.
- Looks for opportunities to build off of other's ideas
- Looks for ways to empower team members by providing levels of autonomy they are ready to handle
- Providing timely feedback on how to improve communication between us. As a member of her team I feel more empowered and like Kerry is genuinely trying to help me to improve.

Senior Colleagues/Peers

- I have had very little to no contact recently with Kerry so I don't think my comments would be helpful
- KP doing a good job of collaborating and initiating/assisting with projects outside of her job description.
- Kristen is now more likely to call and inquire before making quick emails that often appear to be overstepping boundaries.
- Seems focused on career advancement and how this might be a factor in that path.
- Seems to have a genuine desire to want to improve.
- She is more "cooperative" in her discussions with others vs. being more argumentative.
- She is trying very hard to listen before jumping to a conclusion or stating her point of view.
- Started with a noticeably more collaborative attitude about the first month of the process.

Manager

- Her demeanor during interactions is much better, she is more patient and relaxed, she listens more
- Others have commented on her change in attitude and improved interactions
- She bounces ideas off others before taking a stance.

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

Direct Reports

- Be more aware of her choice of words, tone of voice, body language, and the impact it is having on the conversation
- Be more aware of the impact her verbal and written communication is having
- Continue to think about how to empower team members and provide opportunities for growth and improvement.
- Get input from affected parties when decisions have a ripple effect
- Provide opportunities for team members to have "wins" and get face time with Portfolio Management. Be inclusive in conversations when possible that impact the work we're doing.

Senior Colleagues/Peers

- Be in the office and available for calm conversations and support of team members.
- Continue what she is doing.
- Focus on long-term external and internal relationships above immediate action and results.
- Nothing specific, continue what she is doing.
- Possibly start decisions with "have I asked every single person that could be affected by this decision?"

Manager

- Continue the process, don't slide back.
- Continue to seek feedback from others.
- Use some type of reminder about how to interact with others prior to any interaction.

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

Senior Colleagues/Peers

- No.
- Perhaps the team just needs more resources and the volume of work is leading to the personal challenge.

Manager

- Consider this an ongoing process; always work to be a better more collaborative communicator.
- I'm not involved with her team on a daily basis so I can't comment on any changes in delegation but this will continue to be important as her region grows.
- These skills will help her effectively manage a bigger team in the future.

KP - AAR – After Action Review

- **What did you set out to do:**

From the onset I wanted to make the most of this coaching opportunity. Below are the 2 leadership goals I selected and the action plans I created and distribute to all of my stakeholders.

1. Collaborate in order to drive consensus decision making.
   - Speak last when discussing decisions or faced with recommendations. Start the conversations with "what do you think or recommend?" Listen thoughtfully to the views and recommendations of others.
   - Get buy-in from when decisions will have ripple effects.
   - Be the face of "Yes" and "win-win" solutions to problems - start off by establishing common ground and goals before focusing on what doesn't work or poking holes in an argument. Before a meeting or interaction with others think about what to accomplish and how to accomplish it with the other person walking away feeling good about the interaction. Whatever the issue the other party should feel good about the outcome and that they came to the conclusion together.
   - Read the book, Crucial Conversations or Getting to Yes.
   - It's not always possible to come to an amicable conclusion to an issue. If it's important to prevail it should be done in a professional matter of fact to avoid perception as a bully or know it all. I looked for opportunities to defer to others point of view when possible.
   - Be conscious of how she is reacting to others. Is she raising her voice or making facial expressions? These are all reactions that can make others feel she does not respect them or their opinion.
   - Expand thoroughness of written communications. Instead of sending multiple short emails as questions and ideas arise, wait a period for all ideas to form and the outside situation to come together, and then respond in a single, succinct but comprehensive message. Pay attention to the tone; the tone of the e-mail can easily be misinterpreted.
2. Be better at delegating tasks to my team in order to focus on what is most important to manage my time constructively and effectively.
   - Pick up the phone and call vs. email for communicating that requires discussion; even if it means you don't respond immediately, that's ok.
   - Before you start to do a task, always ask yourself if you should be doing it, or asking someone on the team to follow up. This helps everyone learn the process, and how you think about things.
   - Play more of a partner/ coach role than a doer role for acquisitions/dispositions.
   - Providing timely feedback - both good and bad to your team on things that went well, or didn't go well is super helpful and appreciated! Keep it up.
   - Make time for fun!! :) I thought that including the team on the CREW Golf event, etc. builds great rapport and makes everyone want to work harder / smarter for the team.
   - Empower team members to have a reasonable level of autonomy.
   - Provide adequate availability to team members so they don't feel rushed in their learning or questions.
   - Manage and develop relationships with NJ team.

- **What actually happened? How and Why?**

I performed an internal and external 360 review from 15 individuals. I received feedback on areas to improve and areas where I excelled. Through the feedback, I gained insight from peers and senior colleagues and with the help and guidance of Chris, identified and developed two goals as noted above. I identified ten (10) stakeholders who helped keep me accountable for working on these goals and offered me real time feedback (positive or areas to improve) in reaching them in conjunction with my regular coaching sessions. At first I found some of the stakeholders to be 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. Chris provided me with daily

checklists to keep me focused on my goals. In changing behavior and developing leadership style, I found routine to be very helpful. Using the daily sheet provided constant check ins. I followed that with challenging myself by asking the question "what did I do today to improve," then I followed up with my stakeholders for feedback asking "is there something else I should have done differently". Chris was available when needed and on short notice, to help review specific situations and analyze how I performed or ways to improve throughout the last six months. He offered strong guidance on tough situations and provided honest feedback.

At the end of the six months, Chris performed a blind mini survey with all of the stakeholders in order to determine how they felt my commitment was progressing in development around my goals. I was pleased to see that all of the stakeholders that responded indicated that they found some level of improvement with the majority of them indicating +2 or higher of being more effective/increase level of change. Some specific comments included:

- Providing timely feedback on how to improve communication between us. As a member of her team I feel more empowered and like K is genuinely trying to help me to improve.
- KP doing a good job of collaborating and initiating/assisting with projects outside of her job description.
- Kristen is now more likely to call and inquire before making quick emails that often appear to be overstepping boundaries.
- Asks questions to ensure understanding of someone's recommendation or suggestion
- Building Consensus across teams. KP did a great job working with members outside of her immediate team to generate a cohesive group response on the property management issues at One Pacific Plaza
- Looks for ways to empower team members by providing levels of autonomy they are ready to handle
- Seems to have a genuine desire to want to improve.

Improvement occurred as a result of not only my commitment but the support of my manager, Frank, ABC and my stakeholders as well as Chris' mentorship. While it was somewhat of a shock to my system to read portions of my initial feedback, I quickly recognized that having the feedback was the best thing that could have happened as it allowed me to focus on what I needed to do to become a better leader. I am very grateful for ABC's financial support and I hope through the development of my goals I have shown senior management a return on their investment. I believe his methodology/program may be something the firm should look at on a broader front.

- **What are you going to do moving forward to maximize this investment and sustain and grow the benefits?**

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:

- Be more aware of choice of words, tone of voice, body language; and the impact it is having on the conversation
- Continue to think about how to empower team members and provide opportunities for growth and improvement.
- Get input from affected parties when decisions have a ripple effect
- Provide opportunities for team members to have "wins" and get face time with Portfolio Management. Be inclusive in conversations when possible that impact the work we're doing.
- Focus on long-term external and internal relationships above immediate action and results.
- Possibly start decisions with "have I asked every single person that could be affected by this decision?" Continue the process, don't slide back.
- Continue to seek feedback from others.
- Use some type of reminder about how to interact with others prior to interaction.

When I first started this program I had an open mind to learning about myself and understanding ways to improve. Thank you to everyone at ABC who provided me with this opportunity and to Chris' coaching; I found the overall experience exceeding my

expectations and very rewarding in many ways. I am committed to continue with this program's concepts and values because I believe in it and I have seen the positive results for me and the ABC. I am committed to being more collaborative and soliciting feedback from my peers, direct reports and manager to constantly make adjustments where appropriate to improve upon my leadership.

Thank you very much to Frank, Deb and ABC for providing me with this opportunity.

Sincerely,
K P