



# Stakeholder Centered coaching

Mini-Survey Report

For

Jack Clarkson  
CFO

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

Do you believe Jack 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, **P**=Peer, and **C**=Colleague.

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

			-3	-2	-1	0	+1	+2	+3	NCN	NI
<b>MS#1</b>	1. Is building trust	<b>DR</b>	2			2	2		1		
		<b>P</b>	1		1	2					
		<b>C</b>				1	2		1		
		<b>M</b>				1					
		<b>S</b>						1			

<b>MS#2</b>	1. Is building trust	<b>DR</b>				1	4		1		
		<b>P</b>					1	3			
		<b>C</b>					3				
		<b>M</b>						1			
		<b>S</b>							1		

<b>MS#3</b>	1. Is building trust	<b>DR</b>						3	3		
		<b>P/C</b>				1		1	2		
		<b>M</b>						1			
		<b>S</b>							1		

			-3	-2	-1	0	+1	+2	+3	NCN	NI
<b>MS#1</b>	2. Collaborates effectively	<b>DR</b>		1		1	4	1	1		
		<b>P</b>				2	1	1			
		<b>C</b>				2	1		1		
		<b>M</b>					1				
		<b>S</b>							1		

<b>MS#2</b>	2. Collaborates effectively	<b>DR</b>					4	1	3		
		<b>P/C</b>					4	1			
		<b>C</b>									
		<b>M</b>						1			
		<b>S</b>							1		

<b>MS#3</b>	2. Collaborates effectively	<b>DR</b>				1	1	3	2		
		<b>P/C</b>					1	4	2		
		<b>M</b>						1			
		<b>S</b>							1		



**Response and Follow-Up**

Has Jack talked with you about his stated goals?	#3	<b>YES = S, 6DR, P, C</b>	<b>NO = P</b>
	#2	<b>YES = S, M, 6DR, 3C, P</b>	<b>NO = P</b>
	#1	<b>YES = S, M, 7DR, 4C, 3P</b>	<b>NO = P</b>

To what extent has Jack followed-up with you on the areas that he has committed to improve?	<b>MS#3</b>		No Perceptible Follow-Up
		<b>DR, 2P</b>	Little Follow-Up
		<b>S, 3DR, C</b>	Some Follow-Up
		<b>2DR</b>	Consistent (Periodic) Follow-Up
	<b>MS#2</b>	<b>P, C</b>	No Perceptible Follow-Up
		<b>M</b>	Little Follow-Up
		<b>S, 4DR, 2C</b>	Some Follow-Up
		<b>2DR, P</b>	Consistent (Periodic) Follow-Up
	<b>MS#1</b>	<b>C, P</b>	No Perceptible Follow-Up
		<b>DR, C, P</b>	Little Follow-Up
		<b>S, M, 6DR, 2C, 2P</b>	Some Follow-Up
			Consistent (Periodic) Follow-Up

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

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

Mini-Survey #3	Mini-Survey #2	Mini-Survey #1
<p style="text-align: center;"><b><u>Manager</u></b></p> <ul style="list-style-type: none"> <li>The effort and changes Jack has made are quite amazing. It has been over a year and I think they are really a part of how he will continue to lead and manage in the future. Well done</li> </ul> <p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>Jack has allowed decisions to be made without adding administrative burden.</li> <li>Jack has made an effort to not make conclusions without all the details and facts.</li> <li>Doing a great job in allowing his directs the space to succeed, not micromanaging.</li> <li>He acknowledges his directs' work &amp; efforts during mtgs</li> <li>He does seem to care what people think of him and open to constructive feedback.</li> <li>He tells me he appreciates my work which makes me feel like my work matters</li> </ul>	<p style="text-align: center;"><b><u>Manager</u></b></p> <ul style="list-style-type: none"> <li>Has been more proactive in communication, in particular when he falls behind, in the past he would fall behind and not notify.</li> <li>He has listened more, accepted responsibility for his actions or his team's actions and only then pointed in another direction.</li> </ul> <p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>He has been seeking more data before reaching a conclusion</li> <li>He has dramatically improved being on time for meetings and calls</li> <li>He has improved in communicating clearly when he cannot or has to reschedule a commitment</li> <li>He has improved in making team members feel important and that his/her work matters and is a contribution to the company</li> <li>He has mended some of the wounds he has caused with other key stakeholders</li> <li>Maintain all regularly scheduled accounting/finance meetings</li> <li>Really can see he is trying to build trust and collaborate, both within F&amp;A and throughout the company.</li> <li>You are obviously trying hard to change.</li> </ul> <p style="text-align: center;"><b><u>Peers</u></b></p>	<p style="text-align: center;"><b><u>Manager</u></b></p> <ul style="list-style-type: none"> <li>acknowledged his focus</li> <li>agrees improvement is needed</li> <li>doing better job with general overall communications</li> </ul> <p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>Communicated his goals to team.</li> <li>Continue to build relationships, both across and below his level in the organization.</li> <li>Jack has asked for feedback.</li> <li>Jack has improved on starting and ending meetings on time.</li> <li>He has been more available lately, which is good, but I am not fully on board with the office hours concept. More below.</li> <li>He is a little more open to listening prior to reacting.</li> <li>He's arriving earlier to the office in the morning.</li> <li>He's been more on-time for meetings.</li> <li>He's made himself more available to his team.</li> <li>I believe he Jack has become less defensive; he has backed away from reaching a quick conclusion. He is more understanding of the great amount of detail that is out there, and that he may not fully have all of those details. He should continue to focus here.</li> <li>I have noticed Jack occasionally saying, "Good Job."</li> <li>I've noticed that Jack has worked on not adding administrative burden to projects and decision-making</li> </ul>

- He thanks me after I complete a task/project for him
- Maintained office hours
- The effort to improve our relationship continues to improve.

**Peers/Colleagues**

- Jack and his team have been helpful in getting a good resource to help the company with our Pricing initiative.
- Jack has been more effective in Executive Committee meetings. He appears to listen more and solicit others' opinions.
- Exhibited a more relaxed, open dialogue when during meetings, and other related activities.
- Has provided a recommendation to support my efforts in growing my business & achieving company goals
- He has reached out with enthusiasm and collaboration to mutual goals / tasks.
- He hired Patrick to help us get the pricing initiative

- He is communicating more.
- Jim O'hara was a good selection for Director of Financial Planning. That said we are shorthanded and I am feeling the pain from this situation as I knew I would. When I have an open territory nobody gives me quota relief. The same level of accountability needs to exist in every department at KSEA.
- Seems less defensive.
- Seems like he wants to be more collaborative and less about trying to deflect blame onto others.
- Transition of Mike Leahey was a good move. He handled well with the exception of communication to Finance staff. His motivation of trying to allow Dave to save face was pure, but he lost an opportunity to better establish his leadership and expectations for the team.

**Colleagues**

- Asked whether there was anything he could do to build more trust and improve collaboration
- He is collaborating more and seems to be more supportive
- Though interactions have been extremely limited, it appears there has been an attitude change for the better as well as more engaging dialogue when we do interact.

processes.

- Trust was not an issue for me, so I can't speak to that subject. I don't see a change here, but I have not seen anything that would make me have less trust.

**Peers**

- Asked for feedback
- Communicated a plan to improve
- Jack has clearly stated the areas he wants to work on for his own development. I appreciate his courage and candor.
- Jack has done a better job of soliciting others' opinions prior to making a decision. Before, he seemed to make decisions without getting enough feedback from key stakeholders.
- Making personal phone calls to discuss highly controversial issues
- NOTE ref "To what extent ...": Follow-ups have been in form of e-mail to the entire group. No individual follow-up.
- Put together a plan to improve
- Worked with me to craft some of the 2011 corporate goals

**Colleagues**

- focuses on action versus hypotheticals
- He is listening more.
- Remains balanced and non emotional in difficult conversations
- Working on improving his two action items and engaging a bit more and more openly.

**PERSONAL and CONFIDENTIAL: For internal Prism use ONLY**

For more information contact Chris Coffey 310 650 2438 chris@ChristopherCoffey.com

going.

- He is building a finance team around Kevin Regan which will prove beneficial long term.

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

Mini-Survey #3	Mini-Survey #2	Mini-Survey #1
<p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>• Continue to respond more efficiently and effectively in email.</li> <li>• Continue to try to be on time to meetings and calls, especially when held in his office</li> <li>• Jack can be more consistent with messages his delivers. Sometimes he communicates different messages to different people</li> <li>• Jack should be sure to show the same respect to his employees as he would want for himself and as he would provide to his peers.</li> <li>• He shouldn't assume that he knows all the answers, or even that he understands what others are saying. In my observation, he often doesn't understand the point but thinks he does. Then, he responds based on his inadequate understanding of the situation.</li> <li>• Review emails/work/projects and respond in a timely manner to the respective employees asking for feedback/answers so they may proceed w/their work</li> <li>• Should get out more to gain a personal relationship with people, not just when he needs something.</li> </ul>	<p style="text-align: center;"><b><u>Manager</u></b></p> <ul style="list-style-type: none"> <li>• Keep working on his relationships with individuals, beside business discussions have general discussions and continue to build trust.</li> <li>• Within Business Planning, dig in more, assure accuracy of data presented.</li> </ul> <p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>• Allow others to make decisions and not micro manage as much</li> <li>• Continue being on time.</li> <li>• Continue communicating clearly with the intention of the other party understanding.</li> <li>• Continue listening to his directs concerns, if any</li> <li>• He still struggles with the PRISM LTD culture and adapting his style to the company.</li> <li>• Maintain office hours</li> <li>• Remember that everyone doesn't</li> </ul>	<p style="text-align: center;"><b><u>Manager</u></b></p> <ul style="list-style-type: none"> <li>• continue to meet personally with key colleagues &amp; discuss how Jack &amp; his dept can support them and how Jack as individual can better support them</li> </ul> <p style="text-align: center;"><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>• Allow low risk decisions to be performed without his input.</li> <li>• Discussion will be more constructive if you honestly seek to understand rather than trying to verbally back the other person into a corner.</li> <li>• He needs to use email as part of his communication, both incoming and responding.</li> <li>• I can tell that he's putting effort in being a better leader.</li> <li>• I think he's doing a great job.</li> <li>• Keep a list of key deliverables and check in weekly, too often we find we need to spend sufficient time to get Jack up to speed.</li> <li>• Still appears to be over-commitment of company goals for the year. This will lead to dilution of quality.</li> </ul>

- When Jack drops the ball or otherwise messes up, he should be honest about accepting responsibility rather than coming up with excuses or trying to shift blame to others.
- While Jack may enjoy trying to prove his point using debating skills, we don't all enjoy that type of behavior. In fact, trying to back someone into a corner can result in a lack of respect and trust in him because it seems that he just wants to get his own way at all costs.
- Work on being fair and treat employees the way he would like to be treated

#### Peers/Colleagues

- Continue to reach out / engage in dialogue to foster continuous improvement and collaboration
- Continuing to remember what he is doing to receive the positive feedback and to continue that behavior
- Jack still has problems in his own backyard, primarily AP. I am concerned that not enough attention is being paid to that area. I hear of many examples where bills are not being paid in a timely manner. There's lots of organizational frustration.
- Recently in an Executive Committee meeting, Jack stated the he didn't have control over the Billing process and that it resided in Marian Favors' group. He seemed to wash his hands of any of the Billing problems; however, as the CFO, I would expect him to influence the process if he thought it was problematic.

enjoy/do well at debating, so moderate your tone and perhaps language when asking a person to explain their point of view. You need to come across as really interested in considering the other person's viewpoint rather than as argumentative.

- Remember that others may have a better understanding of certain situations or technical matters than you do.
- Try to consistently apply the new communication tools and methods.

#### Peers

- Expedite change and recruiting to support change.
- I have found Jack deflects accountability. He should continue to work on this as this will build trust.

#### Colleagues

- Executive Committee analysis and conclusions could be more transparent
- Goals could be clearly stated, more consistent and better aligned with performance objectives
- Just keep doing what he is doing and eventually people will begin to

- Still needs to understand Prism Ltd, both culture and core values.
- Take responsibility for reading and responding to your e-mails.
- Tell the truth. When you drop the ball or make a mistake, admit it.

#### Peers

- Empowering others is a winning strategy
- It is clear that Jack is trying to improve. When he solicits feedback regarding if I have seen progress or not, he can come across as defensive. It's a delicate balance of asking enough questions to seek clarity and asking so many questions or giving so many explanations of his behavior that he appears defensive.
- I was personally disappointed when Jack through my department under the bus when it was really something that he had made a mistake on. That felt like a major setback in the progress he was making.
- Fully understand cause and effect of dynamics you are reporting on
- Focus on improving operations within your supervision
- Assume ownership of anything that happens within your departments
- Gain a better understanding and appreciation for business functions, roles and responsibilities of others
- Clearly state personal opinions and remain consistent and open with others about agenda
- Practice less political posturing and hold others

**PERSONAL and CONFIDENTIAL: For internal Prism use ONLY**

For more information contact Chris Coffey 310 650 2438 [chris@ChristopherCoffey.com](mailto:chris@ChristopherCoffey.com)



<ul style="list-style-type: none"><li>• Work in the field quarterly to stay connected to reality.</li></ul>	<p>trust him.</p> <ul style="list-style-type: none"><li>• Spreadsheets could be reviewed by business owners before becoming executive criticisms</li></ul>	<p>more accountable where accountability is lacking</p> <p><b><u>Colleagues</u></b></p> <ul style="list-style-type: none"><li>• gain agreement on action and hold people accountable</li></ul>
---	--	--

**Is there any other information you would like Jack to consider?**

Mini-Survey #3	Mini-Survey #2	Mini-Survey #1
<p><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>Assigning multiple people in his organization to projects that are the same or similar is a waste of resources and demonstrates a lack of confidence in his people.</li> <li>Jack should remember that most employees are trying to do a good job. If it appears they haven't, chances are there are limiting factors that he isn't aware of. He would be well-advised to ask discerning questions to understand the root causes prior to seeking to place blame.</li> <li>Perhaps it would be a good idea for him to talk about his goals and ask for feedback more often instead of sending an email a day before the mini survey goes out</li> <li>Recently, Jack has returned to using the behaviors that caused</li> </ul>	<p><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>Building trust is not something that comes overnight. It takes time and consistent trustworthiness.</li> <li>Consider letting go of some responsibilities – susceptible to micromanagement</li> <li>I think it's great and amazing that he wants to stretch himself and be a better leader</li> <li>Share work being done across all responsible areas (accounting, finance, IA, etc.)</li> </ul> <p><b><u>Peers</u></b></p> <ul style="list-style-type: none"> <li>Focus on getting his house in order. There is a lot of meat on that bone and this should be his focus.</li> </ul> <p><b><u>Colleagues</u></b></p> <ul style="list-style-type: none"> <li>Greater context and business perspective prior to making financial</li> </ul>	<p><b><u>Direct Reports</u></b></p> <ul style="list-style-type: none"> <li>Jack should consider leveling reward and compensation within the organization.</li> <li>I feel that Dean's efforts in collaboration can be characterized as somewhat passive. I feel that his solution is to require collaboration rather than foster it with his personal actions. I feel I have been directed to make sure he is aware of everything, meaning it is my action item to come to him and make sure he is aware of key deliverables. It is rare when he requests a direct update—rather, he has office hours in which he expects to be updated. If I am supporting another executive, and they want an update on a project they are tied to, I will get a meeting request, or a call from the exec or the admin requesting time. The other executives reach out when they feel they are not fully up to speed a key deliverable. I often feel we need to remind Jack of the key deliverable, then update him fully, which is often with time running thin. I believe he should reach out for time and make himself available, I personally have a negative perception of the office hours concept. Yes, he is responsible for a great deal and it is a challenge to manage, but he needs to take the responsibility to be fully informed. I believe he has conveyed that it is our issue that he is not always fully informed—sometimes it may be our issue, but I would say the issue primarily is on his side.</li> <li>Keep up the good job.</li> <li>Meetings would be more productive if you came prepared.</li> </ul> <p><b><u>Peers</u></b></p> <ul style="list-style-type: none"> <li>Be more open about disagreements or differing opinions from others, seek rapid decisions</li> <li>Building relationships may be a pre-requisite of building trust</li> <li>Jack is smart and has a lot of good insights. However, he offers his insights only when safe.</li> <li>Recognize accomplishments when progress is made and change from status quo occurs</li> </ul>



issues prior to the start of coaching. Having used the taught behaviors for a while and then regressed has decreased my level of trust in him as it seems that he's capable of "putting on an act" when he wants to, but hasn't really changed his underlying mode of thinking.

**Peers/Colleagues**

- It's been an enjoyable experience to see his efforts and work with him since the growth plan was established.

conclusions could exist

- Less anxiety could exist around chaotic exercises and emergency meetings for ownership
- Specific actions, goals and decisions could be made as opposed to endless scrutiny, discussion, criticism and exercises around status quo without decision making

- Take ownership where mistakes or premature financial assumptions are made
- Trust is a difficult thing to regain once lost. I believe that Jack made several missteps in the past. He needs to be very careful and thoughtful how he makes decisions and how he communicates with others.
- When working one on one with Jack it seems he can be collaborative and that I can establish a partnership with him. At least when we agree on things. However, in meetings, he is completely different. Jack will stand on the sidelines to avoid getting into the fray. Being a leader isn't always clean and fun. As a leader sometimes we have to stand in the line of fire. Here are some examples where Jack has lost my trust and my respect: (1) There is a particular director that everyone has trouble getting along with. Jack will never disagree with him even when this person is clearly wrong and being difficult to work with. This director throws out crazy accusations that Jack won't refute even when he knows the accusations aren't true; (2) Recently, in a large meeting a particular department was being unfairly vilified for something. Jack had knowledge and information that would have exonerated this department. He chose not to share it. I've seen this behavior so many times that I cannot trust him. He chooses sides based not on what is right for the company but on what will keep his clothes the cleanest, will score him the most brownie points or will deflect attention away from him. I've experienced him throwing the proverbial grenade into the room and then run for cover. I have trouble respecting him because of this behavior.

**Colleagues**

- I haven't had that much interaction to further comment at this point.

## After Action Review

Topic: Second mini-survey for Jack Clarkson's executive coaching program in

### What did I set out to accomplish?

To have more/a greater percentage of my stakeholders indicate that had noticed positive changes as it relates to building trust and collaborating better.

To collect stakeholders comments acknowledging improvements and areas remaining to improve, and to determine what additional actions steps (if any) are needed to continue improving.

### What happened?

1) The scores improved noticeably. Total stakeholders = 16.

- **Building Trust:** In the first survey, four stakeholders indicated negative change. In the second survey, zero stakeholders indicated negative change. In fact, all stakeholders indicated positive change, except one who indicated no change.
- **Collaborates Effectively:** In the first survey, one stakeholder indicated negative change. In the second survey, zero stakeholders indicated negative change and all indicated a positive change.

2) Stakeholder comments indicated noticeable and positive changes.

Examples:

#### *What has Jack done to improve that you want to acknowledge and reinforce?*

- He has been seeking more data before reaching conclusion.
- He has improved in making team members feel important and that his/her work matters and is a contribution to the company.
- He has listened more, accepted responsibility for his actions or his team's actions and only then pointed in another direction.
- Really can see he is trying to build trust and collaborate, both within F&A and throughout the company.
- Seems less defensive.
- Asked whether there was anything he could do to build more trust and improve collaboration.
- It appears there has been an attitude change for the better as well as more engaging dialog when we interact.
- He is communicating more.

**PERSONAL and CONFIDENTIAL: For internal Prism use ONLY**

For more information contact Chris Coffey 310 650 2438 [chris@ChristopherCoffey.com](mailto:chris@ChristopherCoffey.com)

3) Stakeholders provided constructive suggestions for additional improvement.

Examples:

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

- Keep working on his relationships with individuals, besides business discussions have general discussions and continue to build trust.
- Continue communicating clearly with the intention of the other party understanding.
- Continue listening to his directs concerns, if any.
- He still struggles with the KARL STORZ culture and adapting his style to the company.
- Remember that others may have a better understanding of certain situations or technical matters than you do.
- Expedite change and recruiting to support change.
- Just keep doing what he is doing and eventually people will trust him more.
- Spreadsheets could be reviewed by business owners before becoming executive criticism.

***Other comments***

Examples:

- Building trust is not something that comes overnight. It takes time and consistent trustworthiness.
- I think it is great and amazing that he wants to stretch himself and be a better leader.

4) I was able to add two more action statements to my plan based on input from the second survey. I like that this process can be dynamic over time.

**What were the lessons learned?**

Consistently working my plan has helped me be more conscious of my behavior and the behavior of other people. The daily worksheet that Chris and I created keeps me focused.

I need to make more opportunities to follow up with people and ask if they have noticed a difference. In the past, this felt awkward to me and a little too “staged”. Now, I have informed stakeholders to expect that I will do this, so I feel a little more at ease asking.

**Stakeholders do notice hard work and appreciate it. I felt good that people acknowledged it and also understand they are looking for more. Chris’s ability to keep me focused. In addition, he help me think issues through, be able to see the big picture and articulate it effectively. Thanks Chris**



Guaranteed & Measurable  
Leadership Growth

I have good trusting relationships in the company and I have some relationships that need continued nurturing. Holding trust is consistency. Gaining trust (where it was lost or didn't exist to begin) takes some time.

**PERSONAL and CONFIDENTIAL: For internal Prism use ONLY**  
For more information contact Chris Coffey 310 650 2438 [chris@ChristopherCoffey.com](mailto:chris@ChristopherCoffey.com)