PRIOR
Consulting

(Date)

Leadership Coaching Playbook©

For (NAME), Organization

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(Example) Leadership Coaching Goals

1. After being promoted to group executive, the leader will re-frame relationships with peers.

   Measurement:

   - Roles and responsibilities will be clearly defined and executed.

   - A set of team goals will be established.

   - The leader will provide clear direction and expectations for former peers.

2. Shift Producer/Manager/Leader® mindset and workload to meet the challenges of the organization: spend more time leading, less time producing.

   Measurement:

   - An analysis of the activities in the Coachees' calendar will take place at the beginning and end of the coaching relationship to determine the percentage of time allocated between the activities of producing, managing and leading. The delta will be measured.

3. Develop confidence and presence as a leader. Envision and implement this leadership "brand."

   Measurement:

   - The delta in perceptions of the leader's confidence and "presence" will be measured through interview/on-line assessment at the beginning and end of the coaching relationship.

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Coaching Confidentiality Guidelines

Coaching is a learning process. Trust and confidentiality are at the heart of an effective coaching relationship. Coachees, their managers, and other key stakeholders need to be able to share observations and insights freely with the coach and one another without fear of repercussion.

This set of confidentiality guidelines is intended to help all participants of the 360 feedback process be sensitive to the confidentiality issues from each other's point of view.

- **All data gathered about a Coachee (stakeholder interviews, assessment results etc.) are confidential and "belong" to the Coachee.** The coach and the Coachee will review this data and determine what level of detail is shared with their manager. Coachees are expected to share the following with their managers: headlines about their learning from the assessments, their coaching goals, and eventually their development plans.

- **All conversations with a coach are confidential.** This includes stakeholder interviews, conversations with partners, peers, direct reports, managers and others. The only exception is that a coach may be required to reveal to appropriate members of the organization or legal authority, any information regarding illegal or unethical improprieties or circumstances that pose physical or emotional threat to any individual, group or organization.

- **The coach will work within the organization's proprietary and confidentiality guidelines** and adhere to the company values.

- **Organizational information is kept confidential unless it is otherwise public information.**

- **The coach will have access to Coachees' performance, development, and feedback-related information with the employee's knowledge.**

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Norms and Principles for 360 Feedback

- All assessment results belongs to the Coachee unless other arrangements are made at the start of the coaching relationship. Coachees will be encouraged to share highlights with managers and stakeholders. **We will assume that we all agree to these guidelines as we proceed forward.**

- The purpose of the 360 is to hear feedback on leadership style and effectiveness. The following are example questions that can be answered through a 360 assessment:

  - What would enhance my leadership capabilities?

  - Is this the right role for me or should I consider a non-management role?

  - What would it take for me to be the kind of leader people would choose to work for?

  - What do I do right that I should keep doing or build upon?

  - What do I do wrong that I should stop doing?

  - What do I not currently do that I should start doing?

  - What do people need from me as a leader?

  - How do others perceive I am allocating my time between the activities of producing, managing and leading?

Before briefing clients on feedback results, remember these **principles of hearing 360 feedback**:

- Remember that the goal of this exercise is to *listen* to your raters.
- *Resist* the temptation to ask, "Who said that?"
- *Resist* the temptation to say, "I know who said that."
- *Protect* the integrity of this process when you leave here today.

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Executive Coaching Process: Approach

Steps	Timeframe
I. Preparing for the Coaching Process	**TBD**
1. Clarify purpose of coaching	
2. Create a common picture of success	
3. Prepare for first meeting with new staff (identify key messages; approach, etc.)	
II. Assessing Development Needs	**TBD**
1. Conduct needs assessment (2.5 days)	
2. Meet with supervisor/other stakeholders	
3. Assessment Tools	
a. Myers-Briggs Type Inventory (MBTI)	
b. Hogan Assessment Suite	
c. Leadership Versatility Index (LVI)	
4. Stakeholder Interviews (10-15)	
a. Direct supervisor	
b. Peers	
c. Direct reports	
d. Customers	
e. Other stakeholders	
5. Review key documents	
a. Goals and objectives for the job/role	
b. Other needed documents	
6. Write the report (up to a day)	

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Executive Coaching Process: Approach, continued

Steps	Timeframe
III. Establishing Goals and Development Plans	**TBD**
1. Deliver the report	
2. Develop action steps/coaching plan	
IV. Implementing and Coaching to the Plan	**TBD**
1. Implement coaching plan	
V Measuring Success	**TBD**
1. Finalize the coaching process; evaluate outcomes	
2. Administer follow-up survey to	
3. Meet with Coachee to deliver final, follow-up survey results and prepare for final meeting with the manager and coach.	
4. Meet with Coachee and manager to finalize Individual Development Plan and help prepare the manager to support the Coachee.	

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Worksheet: Insights and Actions

Meeting Date:

1. **Before the meeting:** *preparing for the conversation*
   - What would you like to have happen during the upcoming coaching meeting?

   - What specific examples, conversations, projects or incidents would you like to bring as content to the conversation?

   - What outcomes or insights are you hoping to achieve?

2. **During the meeting:** *insights and notes from the conversation*

3. **After the meeting:** *next steps/actions*

Action	Timeframe	Owner	Resources needed
1.			
2.			
3.			

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