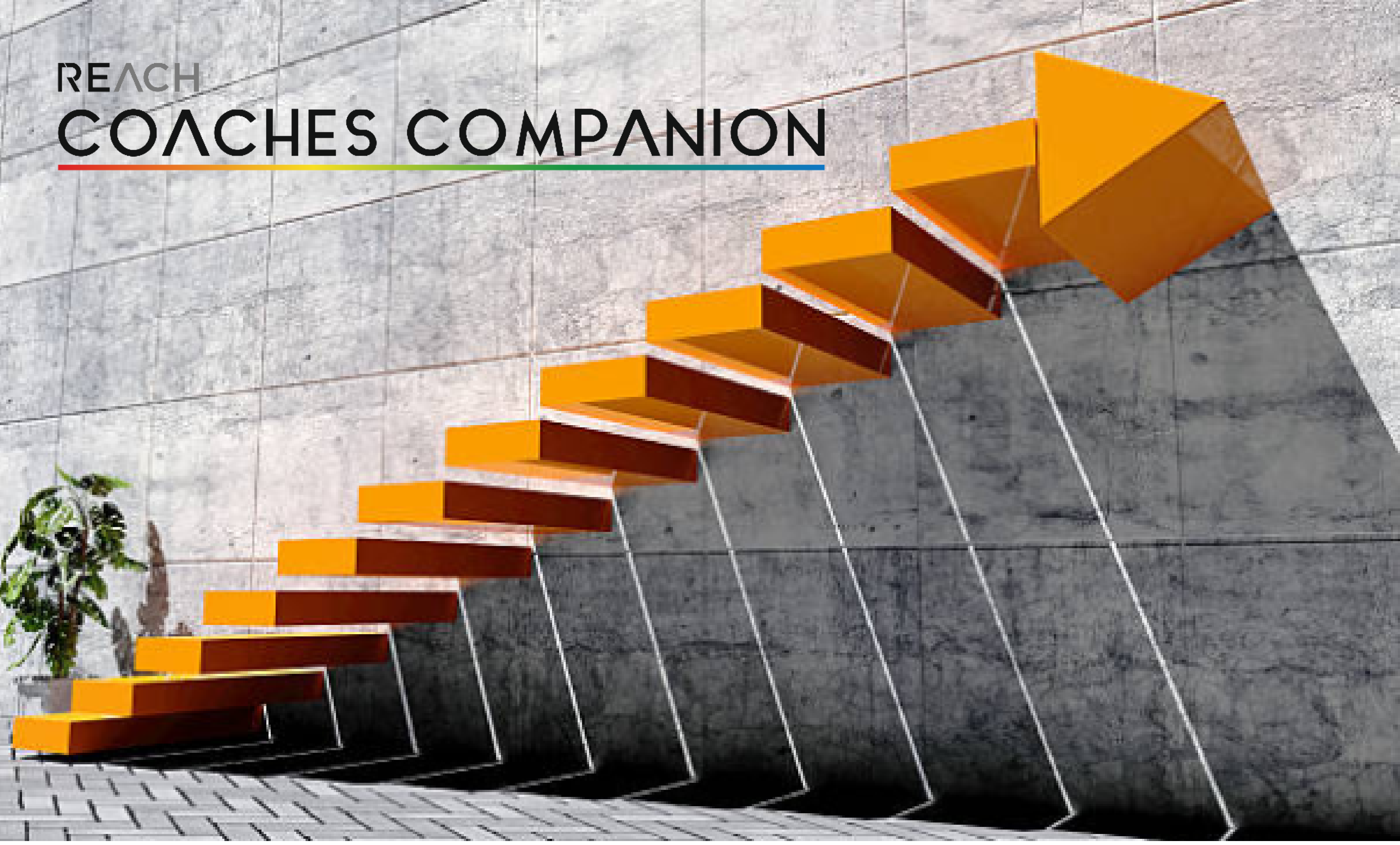



A personalised coaching program for **Charles Poulton** that builds **awareness** *and* **skills** for better self-management and more effective engagement of the people around you.

A key message for Charles Poulton

*Many people talk about investing in themselves, you are doing it – congratulations!*

# Contents

# About

REACH (measured through the REACH quotient, RQ) is a leadership development framework that contextually aligns behavioural styles and associated competencies, to expand interpersonal influence and enhance organizational effectiveness.

This RQ Coaching Program is a modular program that will equip the coach with everything you need to guide your client through a step-by-step, personalized professional coaching and development program to strengthen their RQ and help them grow as a person.

In strengthening their RQ they will become more self-aware, constructively reflective and more resilient in the face of today's continually evolving workplace.

Recognizing that each person's needs are unique, the program has been designed to allow the coach to work flexibly with their client in a way that aligns with the context within which the client exercises influence.

This program is intended to:

- Provide a simple, user-friendly model for leadership development
- Add value to existing programs via best practices for the modern workplace
- Equip leaders to extend their influence based on interactive techniques
- Provide tangible, validated measures for professional growth

This program is not intended to:

- Create a prescriptive, day-to-day routine that cannot be adjusted
- Provide all-inclusive content without room for adjustment
- Limit the coach's options for developing a customized program

# Program Structure

The program is structured into three clusters of 10 modules. You will decide with your client which module to pursue when. The logic behind the structure is that one firstly needs to have a good understanding of themselves to identify their growth areas, and, in experiencing the path of personal growth they are better equipped to assist others in their growth journey.

### Cluster 1: Getting to know me

This cluster develops an understanding of the four personality profiles, which of those profiles is preferred by the client, how and with whom the client exercises influence and what they need to do to optimize their personal growth.

| | |
|---|---|
| Module 1 | Kick off. Scene setting. |
| Module 2 | Personality dimensions and unpacking the REACH |
| Module 3 | Spheres of influence and recognizing strengths |
| Module 4 | Cultivating a growth mindset |

### Cluster 2: Developing my REACH

This cluster begins the journey of personal growth, building on the client's existing strengths and development targets and putting into action different approaches and behaviours to build dimensional strength (Relating and Achieving).

| | |
|---|---|
| Module 5 | Development Targets |
| Module 6 | Practicing REACH |
| Module 7 | Expanding REACH |

### Cluster 3: Developing REACH in others

This cluster explores how the client can develop REACH in others through taking on a coach/facilitator role, creating conditions that allow REACH to prosper and creating future advocates of REACH.

| | |
|---|---|
| Module 8 | Facilitating REACH |
| Module 9 | Creating a REACH culture |
| Module 10 | Multiplying REACH |

# Program Timetable

## Proposed Timetable 1: 13-week program

The following timetable represents a “90-day action plan” that moves quickly through the REACH development cycle.  This timeline is ideally suited for client engagements in which access and resources may be limited, or for those clients who may have experienced some level of REACH development already.  This timeline may require that some module components will be abbreviated, depending on accessibility and/or familiarity with the REACH concept.

Module 1:  1 week

Module 2:  1 week

Module 3:  1 week

Module 4:  1 week

Module 5:  2 weeks

Module 6:  2 weeks

Module 7:  2 weeks

Module 8:  1 week

Module 9:  1 week

Module 10:  1 week

## Proposed Timetable 2:  25-week program

The following timeline represents a very thorough, six-month engagement that takes a “deeper dive” into the REACH concept.  This timeline is ideally suited for engagements in which the client is willing and able to devote significant time for assessment, reflection and practice based on module components.

Module 1:  1 week

Module 2:  2 weeks

Module 3:  2 weeks

Module 4:  4 weeks

Module 5:  3 weeks

Module 6:  4 weeks

Module 7:  3 weeks

Module 8:  2 weeks

Module 9:  2 weeks

Module 10:  2 weeks

It is important that the coach and client discuss expectations and commit to a specific timeline before launching the program. The modular nature of this program allows considerable flexibility in facilitation, regardless of the timeline followed.  Modules can be abbreviated or expanded easily based on the availability, preparation and interest level of the coach and/or client.

# Defining REACH and RQ

While the REACH framework can be recognized in a variety of ways, and offers many applications for personal and professional growth, the primary means of measuring REACH is the REACH Quotient (RQ). More precisely, RQ is defined as:

> "The propensity to recognize and apply diverse interpersonal styles that shape how individuals **Re**late to others and **Ach**ieve goals."

Numerous studies have demonstrated the value of REACH, including the following examples:

- Individuals with stronger RQ exhibit higher Emotional Intelligence.
- Managers with stronger RQ enjoy higher engagement among their direct reports.
- Team leaders with stronger RQ receive higher performance appraisal ratings from their managers.
- Supervisors with stronger RQ devote more time to employee coaching.
- Sales professionals with stronger RQ close more sales.

The behavioural styles included in the REACH framework are derived from the REACH and its Leading Profile Matrix.  The REACH measures four styles, based on the interaction of two underlying psychometric constructs (also referred to as factors):

- Achievement Drive, with methodical on one extreme of the continuum and urgent on the other extreme.
- Relational Drive, with guarded on one extreme of the continuum and expressive on the other extreme.

These constructs, although unrelated, interact to create the four unique styles (also referred to as profiles):

- Counsellor Profile (methodical Achievement Drive, with expressive Relational Drive)
- Coach Profile (urgent Achievement Drive, with expressive Relational Drive)
- Driver Profile (urgent Achievement Drive, with guarded Relational Drive)
- Advisor Profile (methodical Achievement Drive, with guarded Relational Drive)

These profiles represent specific styles of influence that shape how an individual relates to others while accomplishing goals.  It is this dual-factor model of Relational Drive and Achievement Drive that form the basis for REACH.  REACH is demonstrated by leaders who recognize their own preferred style, while interacting with and applying all four styles as the situation requires.

# REACH Competencies

Research involving over 2,000 team leaders suggests that each profile is associated with specific competencies, meaning, team leaders who prefer a specific profile will tend to exhibit certain competencies more comfortably and effectively than others. For example:

Team leaders preferring the Counsellor profile tend to be most comfortable exercising the following Counselling competencies:

| | |
|---|---|
| • Assimilating team members | • Cultivating team spirit |
| • Identifying personal needs | • Recognizing others' efforts |

Team leaders preferring the Coach profile tend to be most comfortable exercising the following Coaching competencies:

| | |
|---|---|
| • Building rapport | • Easing tensions during conflict |
| • Finding synergy | • Rallying others around a cause |

Team leaders preferring the Driver profile tend to be most comfortable exercising the following Driving competencies:

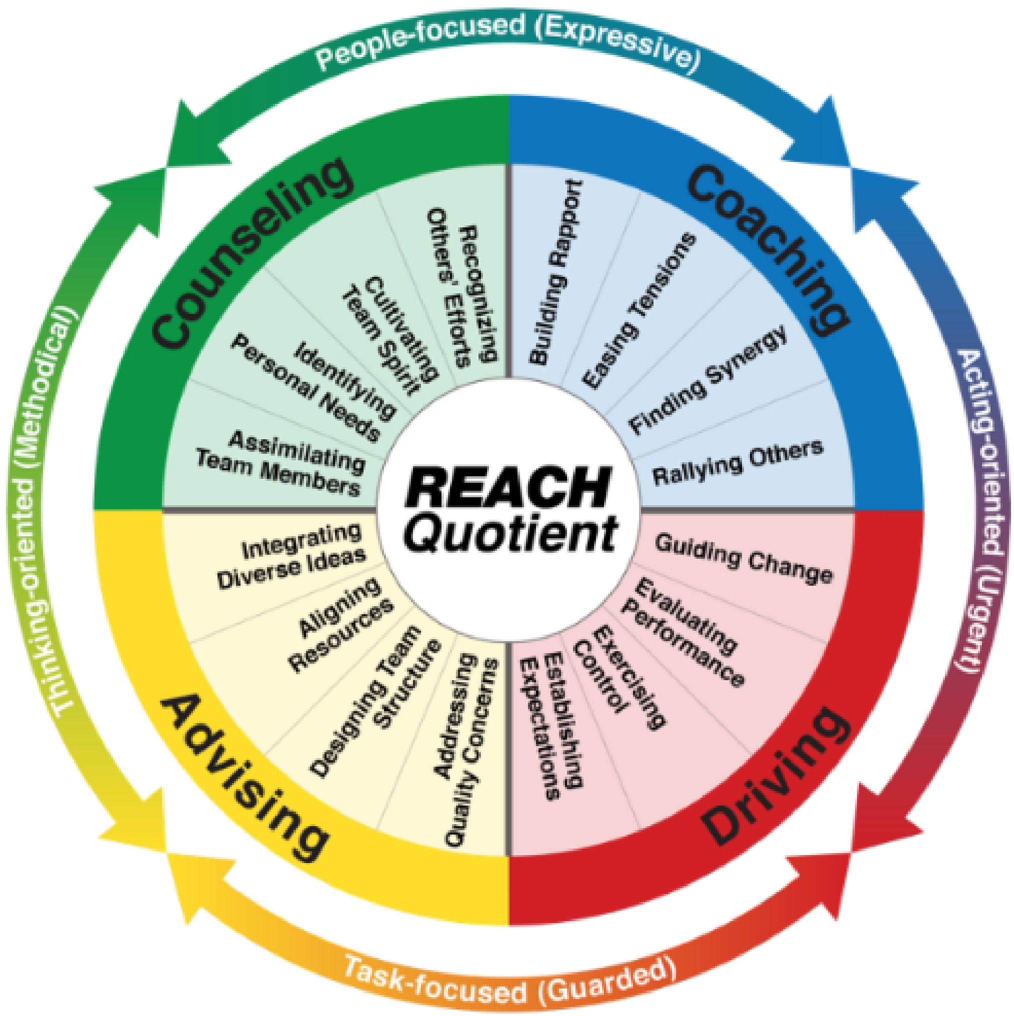
| | |
|---|---|
| • **Guiding change** | • **Exercising control over team processes** |
| • **Evaluating performance** | • **Establishing expectations** |

Team leaders preferring the Advisor profile tend to be most comfortable exercising the following Advising competencies:

| | |
|---|---|
| • Designing structure | • Addressing quality concerns |
| • Aligning resources with needs | • Integrating diverse perspectives |

The RQ “score” is derived from the average rating of all 16 competencies.  Therefore, RQ is strongest when an individual scores the maximum ratings across all competencies - meaning they comfortably perform competencies associated with all four profiles (theirs, and the other three profiles).

The modules contained in this program have been designed to equip the leader to recognize, develop and promote the styles and competencies within the REACH framework.  And, since research clearly shows there is a multiplier effect associated with REACH, the leader can anticipate the benefits of higher productivity and engagement within his or her team will follow.



# Preparation

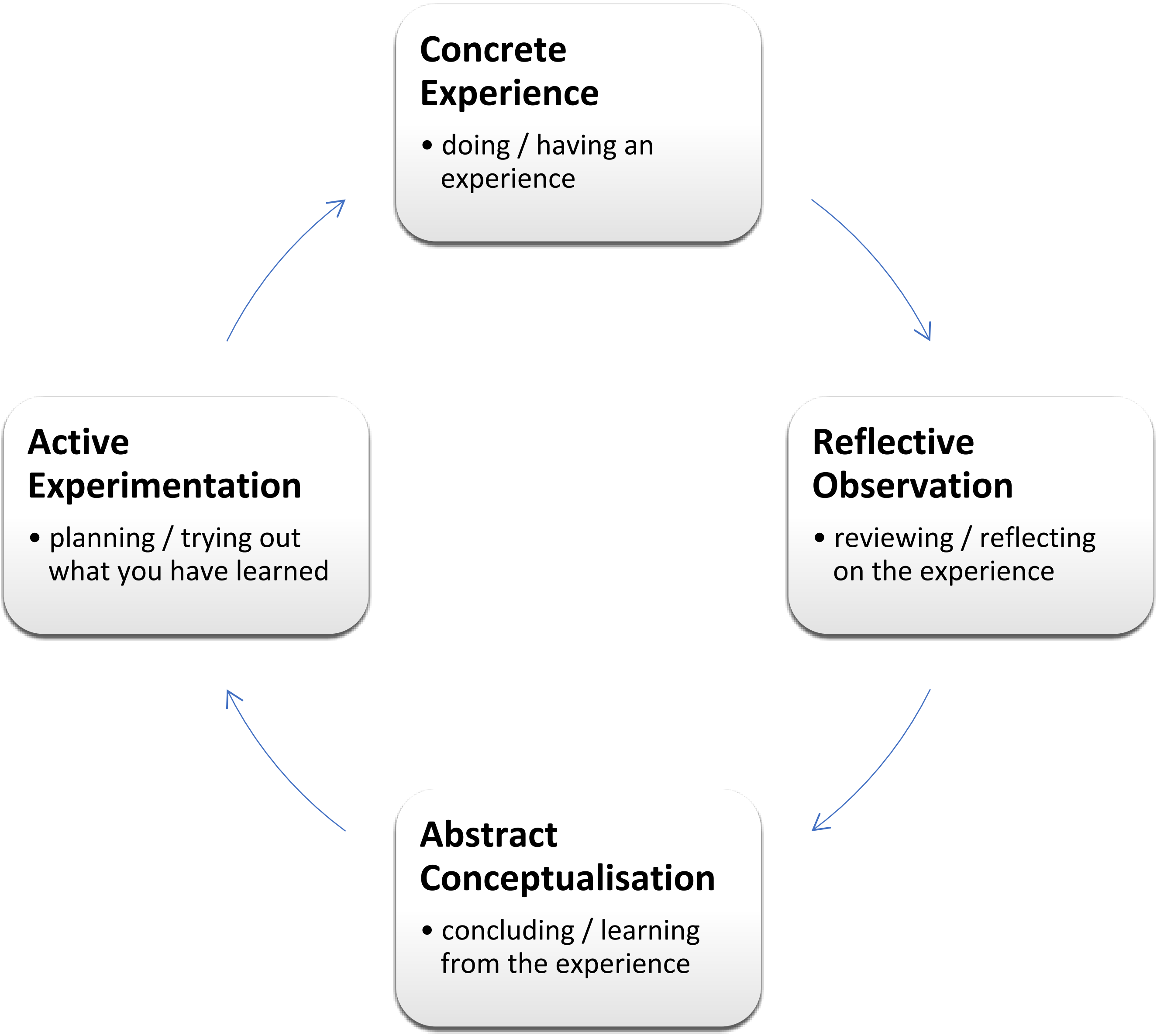
Before embarking on the program, it is best practice to recognize the personality dimensions and learning styles of your client. This can be achieved quickly and easily through the REACH.  So, please ensure you ask your client to complete the REACH prior to embarking on Module 1.  The REACH and related components are integral to the RQ Growth Program.  Elements of the REACH will be addressed in every module, with the following flow in mind:

| | | |
|---|---|---|
| **Module1** | Kick off. Scene setting. | REACH Personal Style Profile |
| **Module 2** | Personality dimensions and unpacking the REACH profile | REACH Personal Style Profile |
| **Module 3** | Spheres of influence and recognizing strengths | REACH Leading Profile<br><br>REACH Quotient |
| **Module 4** | Cultivating a growth mindset | REACH 360 |
| **Module 5** | Development Targets | REACH 360<br><br>REACH Personal Style Profile |
| **Module 6** | Practicing REACH | REACH Communication Profile |
| **Module 7** | Expanding REACH | REACH360<br><br>REACH Quotient |
| **Module 8** | Facilitating REACH | REACH Communication Profile |
| **Module 9** | Creating a REACH culture | REACH Culture survey |
| **Module 10** | Multiplying REACH | |

During this preparation phase, please be encouraged to identify your client’s current RQ as well as their primary profile.  In reviewing their RQ, pay particular attention to the strongest and weakest competencies based on the client’s self-ratings. This program will be fruitful to the extent that the stronger competencies can be leveraged effectively, while the weaker competencies can be improved and applied in leading others.

# The Power of Journaling

Journaling is a powerful aspect of learning and growing and can really accelerate Kolb's Learning Cycle as it provides people with the opportunity to think ahead, plan, reflect and grow.




Many people find it hard to develop the discipline to journal, best practice is to make an entry every day (any length that feels right on the day from one word to a page or two), other people make entries once per week.

Some great coaches order journals with their client's initials on the cover, and help them develop the journaling habit from day 1. If your client is open to it, you'll find a new dimension to your relationship and their growth develops more quickly.

# The profile of Charles Poulton

While people's responses differ at times, Charles's responses indicate they tend to exhibit Advisor style markers most commonly.

The chart below shows Charles's primary profile visually. It is a good time to reflect on the contrasting styles of all 4 profiles and begin thinking about adapting your style for the best outcome with Charles.

## *Counsellor Profile*

Counsellors are best recognized for being: Thinking-oriented and People-focused. The key "markers" or behaviours of the Counsellor Profile include

- **Communicating** with a warm, comforting style
- **Conflict-handling** by accommodating others' views
- **Delegating** by "asking" others for participation
- **Planning** through a careful, flexible approach
- **Learning** with careful, step-by-step reflection

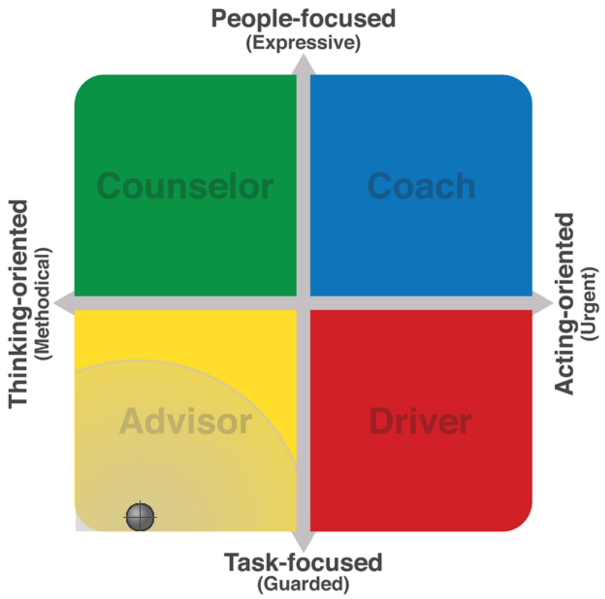
## *Coach Profile*

Coaches are best recognized for being: Acting-oriented and People-focused. The key "markers" or behaviours of the Coach Profile include:

- **Communicating** with charisma, dynamic style
- **Conflict-handling** by collaborating on solutions
- **Delegating** by "selling" others on participation
- **Planning** through a fluid, interactive approach
- **Learning** with active, "big picture" understanding

Charles Poulton's Profile

Charles Poulton's REACH rating: 3.7




## *Advisor Profile*

Advisors are best recognized for being: Thinking-oriented and Task-focused. The key "markers" or behaviours of the Advisor Profile include:

- **Communicating** with a reserved, formal style
- **Conflict-handling** by identifying compromises
- **Delegating** by "teaching" the suggested approach
- **Planning** through methodical, detailed preparation
- **Learning** with careful, step-by-step reflection

## *Driver Profile*

Drivers are best recognized for being: Acting-oriented and Task-focused. The key "markers" or behaviours of the Driver Profile include:

- **Communicating** with a focused, intense style
- **Conflict-handling** by directly confronting the issue
- **Delegating** by "directing" the course of action
- **Planning** through an urgent, adaptive approach
- **Learning** with active, "big picture" understanding

## *Use your REACH to help make the coaching relationship more productive.*

Charles is a Advisor. To help REACH Charles be intentional about your approach and maximise your time spent with them.

**Try to:**

- Focus on the details
- Emphasize logic and rationale
- Draw out specific concerns

**Avoid:**

- Using emotional arguments
- Offering vague expectations
- Pushing for a conclusion}

## *Your Challenge as Coach – Be intentional about your approach with each session.*

Prior to each session, consider your greeting, planning, activities, your questions and responses.

How are you going to use your reach to be purposefully adapting your natural style to give the best impact for Charles?

# Module 1: Kick Off

## What You Will Need:

- A suitable, confidential environment
- GROW handout
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your Focus:

The following initial steps will help to launch the RQ Growth Program, creating an environment of trust, openness and efficiency.  Your focus in Module 1 is on:

- Gaining consensus on the ideal relationship between facilitator and client, emphasizing candour and confidentiality
- Building rapport, seeking mutual and genuine comfort level in sharing insights, perspectives and experiences.
- Arranging the space to remove physical barriers; sitting in an open casual posture and making the setting comfortable and non-threatening. For example, face each other in two comfortable chairs in a casual setting – avoid sitting across a desk in office chairs, which can create imbalance and formality.
- Observing body language that demonstrates areas of particular tension, or repeated themes that may demonstrate hidden layers of concern or tension. Address any such concerns early and candidly prior to moving from one module to the next.

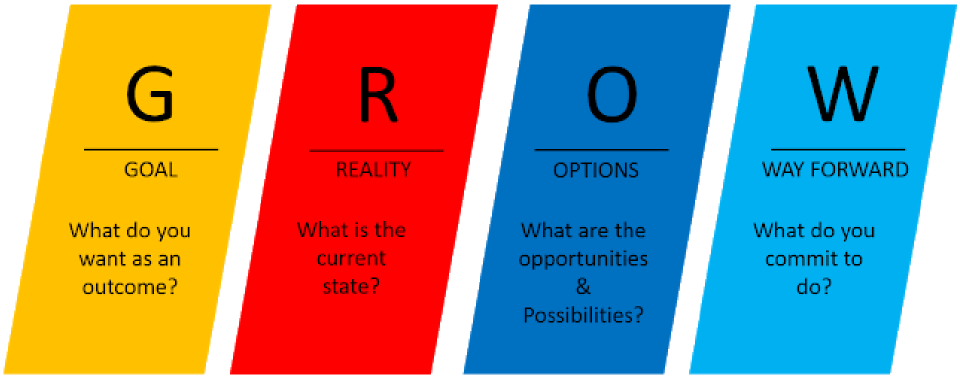
### Part 1: Discussion (Basics)

During this conversation, address the following "basics":

1. At the highest level, what does your client want in their role?
2. How can you, as facilitator, serve your client in becoming a stronger leader?
3. Clarify the client's expectations for the timing of the program.
4. Agree on a timeline for each module, including session times and venues.
5. Establish a communication plan for addressing questions, concerns and accountability between the sessions.  For example, will you communicate via phone, email, or other medium?
6. Ask your client for any questions or concerns they may have before progressing in the module.

## Part 2: Discussion (GROW)

The GROW model is a well-established approach to setting goals, solving problems and advancing one's potential within a training and development context. The model leverages four stages, with each focusing an essential aspect of personal and professional development.




Each module within the REACH Growth Program will be addressed using the GROW mindset. As such, each session should emphasize these four stages, encouraging the client to work continually from goal to the way forward. During this initial session, use some of the following questions (or create some of your own) to address the Goals (G) for the REACH Growth Program. For each question, be sure to encourage further exploration using probing and follow up questions (see clarifying questions later in this section).

- What do you want to achieve through coaching?
- What is most important to you right now? How might this change in light of future roles for which you may be preparing?
- In what aspect of your leadership do you feel most effective right now?
- What would you like to take away from this first session?
- What do you want to happen as a result of this session?
- What do you not expect to happen?

Next, discuss your client's current Reality (R). Consider using one or more of the following questions or create some of your own.

- How would you describe your current professional role?
- How does your role impact the workplace and/or organization?
- To what extent are your unique contributions recognized and/or valued?
- How would you describe your opportunity for advancement?
- How would you describe your skill as a leader?
- How are your ideas typically received?
- What is working well right now?
- Who are your biggest detractors?
- With whom do you tend to have the most frequent conflict?

- To what extent is any of this conflict constructive?
- To what extent is any of this conflict destructive?
- To what extent is any of this conflict personal?
- How is interpersonal conflict typically initiated?
- How is interpersonal conflict typically resolved?
- To what extent do you have access to the resources needed to perform your role most effectively?
- How would you describe the obstacles that keep you from performing at your best?
- How would you categorize such obstacles (such as according to personal, motivational, organizational, resources or outlook)?
- What might hold you back from becoming the best leader you could otherwise become?

Next, discuss the Options (O) that may prevent your client from accomplishing the goals described in the earlier portion of this discussion:

- What are your options?
- How have you tacked this/ a similar situation before?
- What could you do differently?
- Who do you know who has encountered a similar situation?
- Give me 5 options
- If anything was possible what would you do?
- What would your best friend /mother suggest?

What else?

Finally, discuss the way forward (W) with your client using the following questions or some of your own:

- Who are your biggest advocates?
- To whom can you go to for candid, constructive advice?
- Who might be able to provide accountability as you pursue your goals?
- What options are available to you in overcoming the obstacles discussed earlier?
- What more can you do that will help you move forward in your leadership role?
- What commitment are you willing to make (and to whom) in taking the next step in this program?

Clarifying Questions:

- So, can I just clarify, what you have said is….?
- Can you just tell me a bit more about….?
- If I have heard you correctly you have…?
- Tell me more about what has shaped your perception of…?
- What might have worked better for you?
- What options do you have for moving forward?
- What else could you do?

- If anything was possible, what would be your ideal next step?
- If it was up to you, what would be the best-case scenario?
- How have you handled this successfully in the past?
- Who do you know who has been in a similar situation?
- How have other people you know handled similar situations?

## Part 3: Wrap It Up

As you finish this initial session, please recap key observations and restate:

G: The primary Goal for this REACH Growth Program

R: Summarize the current Reality.

O: The main or most pressing Obstacle in completing the program.

W: The key focus of the Way forward

Make sure you have taken sufficient notes in order to follow up on items discussed as the program unfolds. Ask your client if they have any questions or concerns prior to concluding the session. It is essential that the facilitator and client are on the same page regarding expectations, limitations and timing, so make sure any concerns are addressed proactively in this initial session.

## Part 4: Looking Ahead

Before concluding, agree to a date and time for your next session. Comment on the key elements of the upcoming Module 2, with its focus on promoting self-awareness. Specifically, you will introduce your client to the REACH framework, while unpacking his or her REACH results. Your client can look forward to discovering their primary Leading Profile in Module 3.

# Module 2: Personality Dimensions

## What You Will Need:

- A suitable, confidential environment
- GROW handout
- A printed, colour copy of the client's REACH Personal Style Profile
- A printed, colour copy of the your own REACH Personal Style Profile
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your Focus:

Your focus in Module 2 is on:

- Providing an understanding of the REACH Personal Style profile and the four personal styles – Counsellor, Coach, Driver, Advisor
- Providing an understanding of the Achieving and Relating dimensions
- Discuss the coaching points indicated in the report
- Revisit the goal from Module 1 in light of the new information provided by the REACH profile

### Part 1: Unpack the Personal Style Profile – RQ Profiling with the REACH Personal Style Profile

Introducing REACH, personality styles and build trust. We recommended asking your client to complete REACH prior to the engagement, so you can prepare.

It's useful to work through their profile with them.

It's vital that you explain to them that this is NOT an assessment, nor is it a value judgement of them; it is a ***description*** of their natural style and approach. They will develop an awareness of the strengths of their approach, the things they tend not to do, and how their default style affects people with other styles.

Be sure to focus on their strengths and discuss which areas feel 'spot on' and which areas they don't identify with.

As they grow their RQ, they'll find it easier to adapt their style to better connect and be understood by other people, and to make the most of their strengths and those of the people around them.

Many people find it very powerful to build trust, openness and respect (fundamentals of the coaching relationship) by working through your own REACH profile at the same time as you explore the client's. You can compare and contrast your profile with theirs, this helps make it clear one is not better or worse, it is simply a style, and awareness helps us grow and be more effective.

It is suggested you include in the exploration/discussion of the REACH Profile the following points:

- The profile matrix and the relative position of the client (and yourself) on the matrix
- The relative position of the client's plot to the corners or the centre of the matrix and what this means:

  (The closer your plot is to any corner of the matrix, the more your profile will be similar to the profile shown in the respective quadrant. The farther away your plot is from any corner, the less likely your profile will reflect the profile indicated. The closer your plot is to the centre of the matrix, the more you may tend to exhibit characteristics of all four profiles. In reality, there will be occasions when you may exhibit characteristics of each profile, depending on the situation.)

- Markers for the four profiles and people the client may recall who exhibits characteristics of these four markers
- Achieving and Relating dimensions and where the client exhibits a particular strength
- The five key strengths indicated in the report

## Part 2: Review the Goal from Module 1

Work with the client to review the primary goal from Module 1

- How has the awareness of your personal style contributed to how you will achieve your goal?
- How has the awareness of your relational and achievement strengths contributed to how you will achieve your goal?
- How has the exploration of your Profile impacted the obstacles you identified in Module 1?
- Can you use the information you have learned today to redefine the goal from Module 1 to make it more explicit?
- Now revisit the GROW model in light of this redefined goal to arrive at the next steps in the (W)rap up

# Module 3: Spheres of Influence and Recognizing Strengths

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH Personal Style Profile
- A printed, colour copy of the client's REACH Leading Profile
- Sphere of Influence worksheet (Appendix B)
- Strengths Card pack (available from PD Training) and/or Strengths Character inventory (Appendix C)
- Materials for note-taking and sharing the actions to be accomplished before next meeting

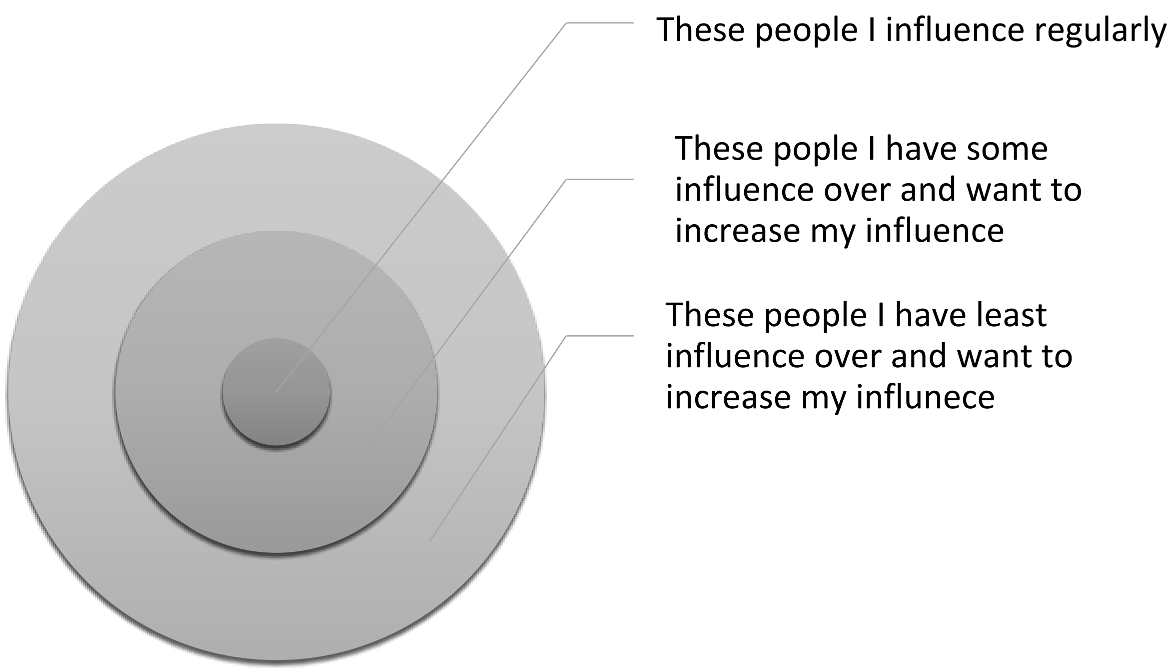
## Your focus:

Your focus in Module 3 is on:

- Having the client understand who is in their sphere of influence and who isn't
- Recognizing strengths
- Exploring the client's REACH Leading Profile and REACH Quotient and making the link between growing one's RQ and increasing one's influence
- Revisiting the GROW model in light of new information

### Part 1: My sphere of influence

Use the Influence Worksheets in Appendix B or create your own in a larger format according to the following principle:



Invite the client to write down the names of people in each section of the diagram.

Say to the client that we will revisit this diagram shortly, but first we need some other information to add to the mix.

## Part 2: My strengths

The REACH Personal Style Profile highlights the relational and achievement strengths of the client. It is suggested that an additional activity is used to identify further strengths for the client.

Here are two ways you can work with your client to identify strengths.

**Strengths Poker**

In this game, we play a 3-4 round game of modified poker, however, there's no betting and no winner. Here are the rest of the suggested rules for a 2-player game:

- Deal 9 cards per person, place one card face down in the middle of the table.
- Each player needs to take some time to read the 9 cards, and pick their top 5. They can discard the other 4 on the table face-up, or if they recognize one as being a strength they see in the other player, they can offer it to them, saying something like – "this reminds me of you".
- Players get an opportunity to review the discarded cards, and see if there is any they want to pick up.
- Deal again by placing 1 card face up and dealing each player with another 3-cards.
- Go through the same process, of selecting the cards that resonate with you most, each player can use the additional card that has been placed face up, and players can 'trade' strengths each round.
- You want to end with 3 final cards that resonate with you most.
- Repeat this deal, review and trade/offer strengths to the other player for 3 rounds of card dealing.
- Make sure each player gets to their final 3 cards.
- At the end, each player reads out their final 3 core strengths and explains why they selected them, and even why they retained their final 3 over some of their shortlisted cards.

It's a great idea to ask your client to take a photo of their final 3 cards so they are all readable fanned out and set the picture as their phone, tablet or PC lock screen or wall paper.

You can order these cards with a 10% discount from PD Training; they are great for small groups and sessions with you and a client.

**Character Strengths Inventory**

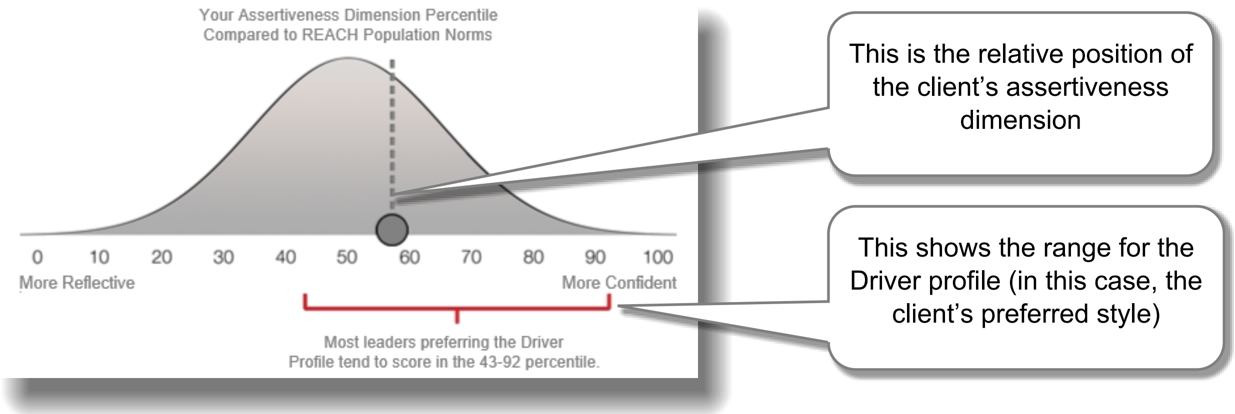
An alternative or adjunct to Strengths Poker is the Character Strengths inventory in Appendix C. These strengths were originally developed through the work of Peterson and Seligman (2004).

## Part 3: Leading Profile

Now is good time to review with the client their Leading Profile. The detail in the report shows for each achieving and relating dimension where the client sits, relative to the majority of people, with the same preferred style as the client. It also shows whether certain dimensions make REACH competencies more or less comfortable. Competencies are influenced by leading dimensions.

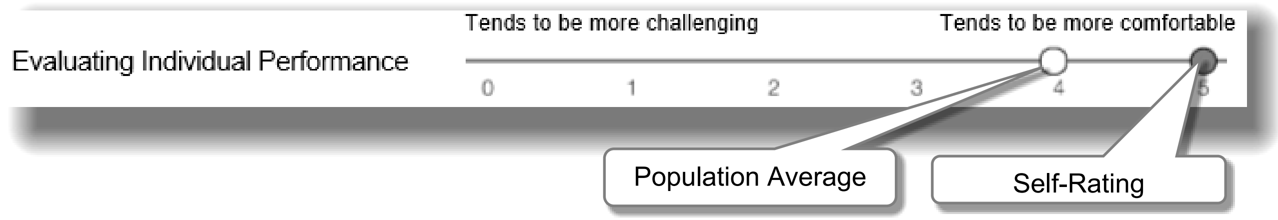
**Examples are given below.**

The image below shows the Assertiveness dimension for a client.



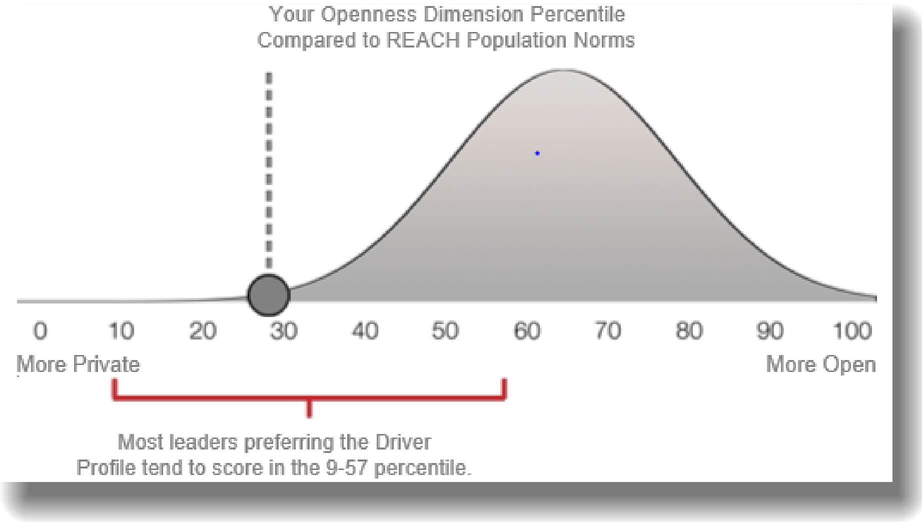

In the example above, the client is well within the range for assertiveness for a Driver.

The client now gets insight on how their level of assertiveness is related to the competency of *Evaluating Individual Performance*:



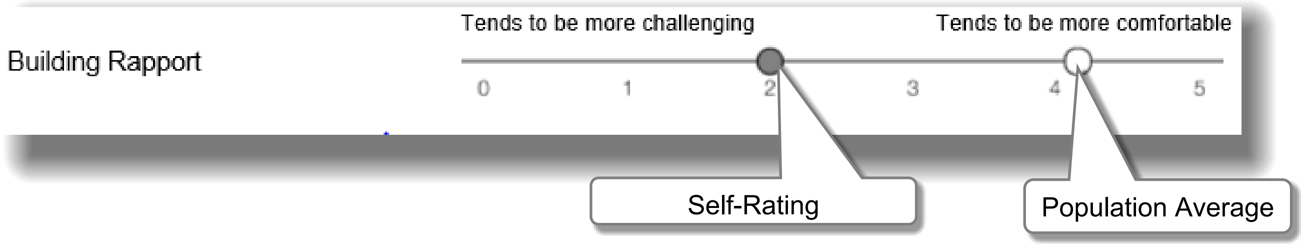

The example above shows that the client has self-rated above the population average and is very comfortable with conducting performance evaluations. This makes sense because the client has also rated above average on assertiveness – a competency that will be desirable when evaluating another's performance.

Consider another example. The image below shows the openness dimension for a client.




You can see that the client is at the 'more private' end of the continuum. The client is also well within the range for the Driver profile.

The client now gets insights on how their level of openness is related to the competency of *Building Rapport.* The client's self-score for 'Building Rapport' is now compared to the population average.




The example shows that the client is less comfortable and will have more of a challenge with establishing rapport than the population average. This not surprising given that the client prefers to be more private than open.

This report contains a good deal of insightful information for your client, further highlighting their relative strengths and opportunities for growth.

## Part 4: Strengths and Influence

As mentioned in the introduction, each coach relationship is different, and each person's needs are unique, so if your client has some specific areas they want to work on, stick with those in the time you have; their goals and current needs always come first.

In every session it is important to maintain a growth focus on the specific challenges and opportunities your client has identified as you work through the GROW model, and work through next steps by identify anything new that has arisen during the time since the last session.

**Review how strengths are related to influence**

Leaders succeed by getting things done through and with other people. Influence is that ability to persuade others to do things. One's ability to influence is related to the strengths of an individual and the extent to which exercising those strengths persuades others. Because we are all different, we will be persuaded in different ways. Growing a client's RQ thorough developing their strengths will give your client a greater range of persuasive ability.

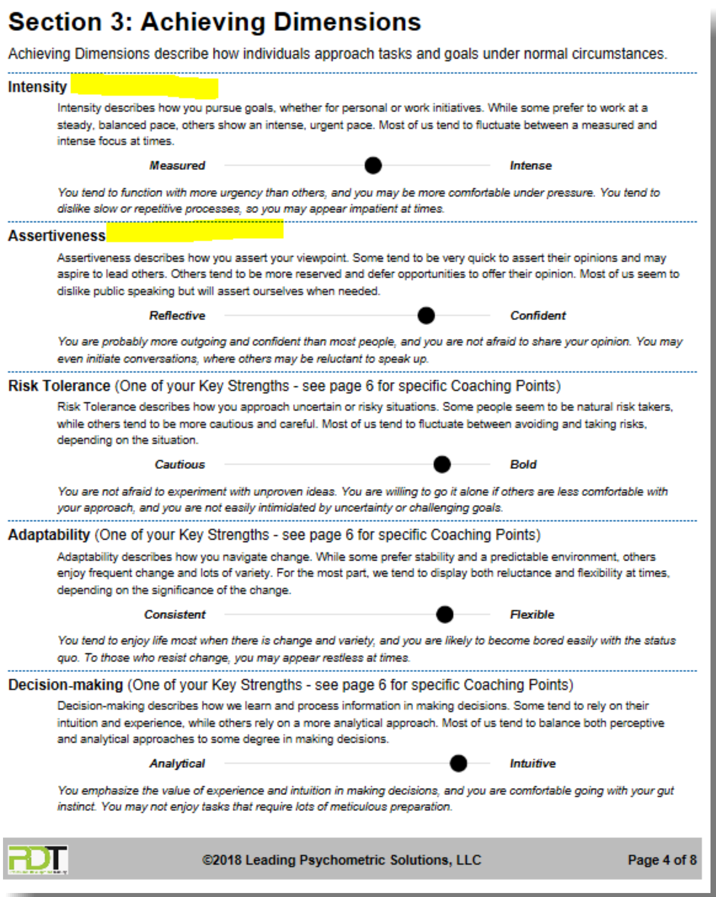
It is suggested that you share with your client the six principles of influencing put forward by Robert Cialdini in the 1980's and discuss how each of these may be related to the REACH Competencies (some suggestions in the following table_.

| Influencing Principle | What it means in practice – why it creates influence | REACH Competencies |
|---|---|---|
| **Reciprocation** | Think of this as "You scratch my back; I'll scratch yours." If you do something nice for someone, they'll do something nice for you | • Finding opportunities for synergy<br>• Recognizing other's efforts |
| **Scarcity** | If it is scarce, we want more | • Identifying personal needs<br>• Aligning resources with needs |
| **Consistency and Commitment** | People who make commitments tend to follow through with those commitments. They have decided, through consistency, that a certain action coheres with who they believe themselves to be. Thus, they make commitments. You cannot get people to commit to you or your vision if they don't see your commitment. | • Recognising other's efforts<br>• Setting clear expectations<br>• Controlling processes<br>• Addressing quality concerns<br>• Finding opportunities for synergy |
| **Authority** | Whether for good or ill, authority figures wield enormous influence. If people believe you know what you are talking about and accept your expertise, they are far more likely to follow you. Influence by authority is an incredible source of power. | • Establishing clear expectations<br>• Evaluating individual performance<br>• Exercising control over team processes<br>• Designing team structure/function |
| **Social Validation - Consensus** | "Monkey see, Monkey do" As independent as we like to consider ourselves, we love to be part of a crowd. It will always be a part of us, that school age desire to be accepted, no matter how many times our parents tell us, "If everyone jumped off a cliff, would you join them?" People will always jump on a bandwagon if their friends like the band. | • Assimilating team members<br>• Building rapport<br>• Easing tensions during conflict<br>• Rallying others around a cause<br>• Integrating diverse perspectives |
| **Friendship and Liking** | Likability is a huge form of influence. Successful salespeople are those who are likeable. They smile. They say nice things. They establish likeability in order to get the sale. People listen to their friends. If they know you and like you, they are far more likely to support you. | • Cultivating team spirit<br>• Building rapport<br>• Easing tension during conflict |

### Review the strengths to develop to increase influence

Review the sphere of influence worksheet from Part 1. Work with the client to determine how they believe they could exert greater influence over some of the key people they identified. Discuss what strengths could be developed to enable this.

**Recommendation:** Pick up to 2 x Strengths or Gaps as the focus and create action plans with them.



**Section 3: Achieving Dimensions**

Achieving Dimensions describe how individuals approach tasks and goals under normal circumstances.

**Intensity**

Intensity describes how you pursue goals, whether for personal or work initiatives. While some prefer to work at a steady, balanced pace, others show an intense, urgent pace. Most of us tend to fluctuate between a measured and intense focus at times.

***Measured*** — ***Intense***

*You tend to function with more urgency than others, and you may be more comfortable under pressure. You tend to dislike slow or repetitive processes, so you may appear impatient at times.*

**Assertiveness**

Assertiveness describes how you assert your viewpoint. Some tend to be very quick to assert their opinions and may aspire to lead others. Others tend to be more reserved and defer opportunities to offer their opinion. Most of us seem to dislike public speaking but will assert ourselves when needed.

***Reflective*** — ***Confident***

*You are probably more outgoing and confident than most people, and you are not afraid to share your opinion. You may even initiate conversations, where others may be reluctant to speak up.*

**Risk Tolerance** (One of your Key Strengths - see page 6 for specific Coaching Points)

Risk Tolerance describes how you approach uncertain or risky situations. Some people seem to be natural risk takers, while others tend to be more cautious and careful. Most of us tend to fluctuate between avoiding and taking risks, depending on the situation.

***Cautious*** — ***Bold***

*You are not afraid to experiment with unproven ideas. You are willing to go it alone if others are less comfortable with your approach, and you are not easily intimidated by uncertainty or challenging goals.*

**Adaptability** (One of your Key Strengths - see page 6 for specific Coaching Points)

Adaptability describes how you navigate change. While some prefer stability and a predictable environment, others enjoy frequent change and lots of variety. For the most part, we tend to display both reluctance and flexibility at times, depending on the significance of the change.

***Consistent*** — ***Flexible***

*You tend to enjoy life most when there is change and variety, and you are likely to become bored easily with the status quo. To those who resist change, you may appear restless at times.*

**Decision-making** (One of your Key Strengths - see page 6 for specific Coaching Points)

Decision-making describes how we learn and process information in making decisions. Some tend to rely on their intuition and experience, while others rely on a more analytical approach. Most of us tend to balance both perceptive and analytical approaches to some degree in making decisions.

***Analytical*** — ***Intuitive***

*You emphasize the value of experience and intuition in making decisions, and you are comfortable going with your gut instinct. You may not enjoy tasks that require lots of meticulous preparation.*

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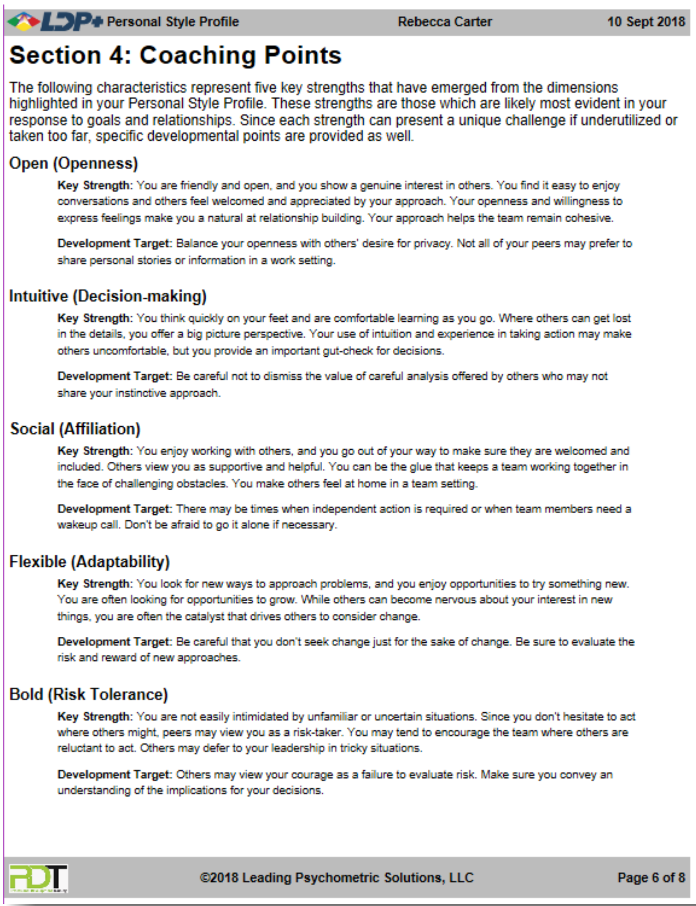

Personal Style Profile — Rebecca Carter — 10 Sept 2018

**Section 4: Coaching Points**

The following characteristics represent five key strengths that have emerged from the dimensions highlighted in your Personal Style Profile. These strengths are those which are likely most evident in your response to goals and relationships. Since each strength can present a unique challenge if underutilized or taken too far, specific developmental points are provided as well.

**Open (Openness)**

**Key Strength:** You are friendly and open, and you show a genuine interest in others. You find it easy to enjoy conversations and others feel welcomed and appreciated by your approach. Your openness and willingness to express feelings make you a natural at relationship building. Your approach helps the team remain cohesive.

**Development Target:** Balance your openness with others' desire for privacy. Not all of your peers may prefer to share personal stories or information in a work setting.

**Intuitive (Decision-making)**

**Key Strength:** You think quickly on your feet and are comfortable learning as you go. Where others can get lost in the details, you offer a big picture perspective. Your use of intuition and experience in taking action may make others uncomfortable, but you provide an important gut-check for decisions.

**Development Target:** Be careful not to dismiss the value of careful analysis offered by others who may not share your instinctive approach.

**Social (Affiliation)**

**Key Strength:** You enjoy working with others, and you go out of your way to make sure they are welcomed and included. Others view you as supportive and helpful. You can be the glue that keeps a team working together in the face of challenging obstacles. You make others feel at home in a team setting.

**Development Target:** There may be times when independent action is required or when team members need a wakeup call. Don't be afraid to go it alone if necessary.

**Flexible (Adaptability)**

**Key Strength:** You look for new ways to approach problems, and you enjoy opportunities to try something new. You are often looking for opportunities to grow. While others can become nervous about your interest in new things, you are often the catalyst that drives others to consider change.

**Development Target:** Be careful that you don't seek change just for the sake of change. Be sure to evaluate the risk and reward of new approaches.

**Bold (Risk Tolerance)**

**Key Strength:** You are not easily intimidated by unfamiliar or uncertain situations. Since you don't hesitate to act where others might, peers may view you as a risk-taker. You may tend to encourage the team where others are reluctant to act. Others may defer to your leadership in tricky situations.

**Development Target:** Others may view your courage as a failure to evaluate risk. Make sure you convey an understanding of the implications for your decisions.

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If the action plans include workshops or formal training, as an RQ Subscriber you have several options.

1. You can leverage the RQ Course Materials you have as part of the subscription and either:
   a) Pick some activities from the relevant courses to run together in a private coaching style session with your client.
   b) If you are a facilitator as well as a coach, you may have the opportunity to run a session for a group of staff in your client's workplace on a relevant topic (such as team building, negotiation skills, customer service, communications, conflict resolution or other relevant topic depending on the needs).

c) Hire an external facilitator or if your client's workplace has internal trainers, provide them with the training materials to run a session internally.

2. Go to an external training provider, such as global partner PDT, that uses the same frameworks and training materials and have one of their facilitators run a session internally. As an RQ Subscriber you'll be able to book PDT at a 10% discount for your client, you can pass the savings on, or retain the gap to get some additional return on your subscription fees.
3. Look to see if external partner PDT run public classes in your area and book your client in (once again you'll receive a 10% discount which you can pass on, or generate additional return on your subscription fees).

Whichever approach you use, you have access to world-class training materials that are built around the same RQ frameworks that will give you targeted solutions to help your client grow their skills.

# Module 4: Cultivating a Growth Mindset

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH360 Feedback Report
- Copy of the Johari Window worksheet (Appendix D)
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 4 is on:

- Having the client understand the concept of a growth mindset and look at inhibitors to this
- Exploring the application of the Johari Window tool
- Exploring the client's REACH360 feedback report
- Revisiting the GROW model in light of new information

### Part 1: The concept of a Growth mindset.

This module uses the results of REACH360 to identify areas for growth. The client needs to be on board with the idea that a growth, as opposed to a fixed, mindset is the best way of mentally approaching the task of growing their RQ.

You can frame the discussion of what a growth mindset is by drawing on the research of Carol Dweck.

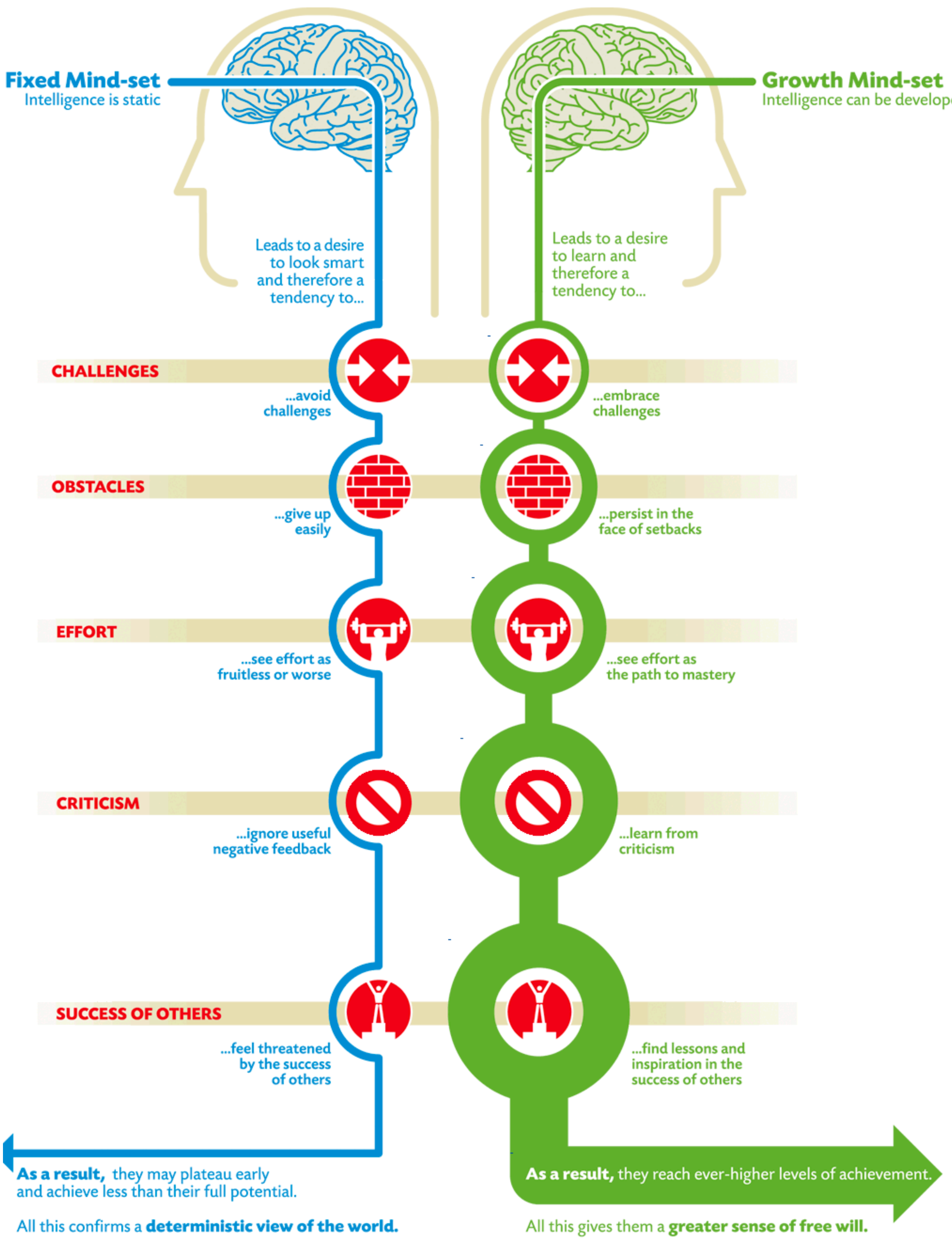
The model on the next page provides a summary of fixed vs growth mindsets.

The concept of resilience is also inextricably linked to a growth mindset:

- Embrace challenge
- Persist in the face of setbacks
- See effort as the path to mastery
- Learn from criticism

You may also like to play the following video.

https://www.youtube.com/watch?v=hiiEeMN7vbQ


Fixed Mind-set
Intelligence is static
Growth Mind-set
Intelligence can be developed
Leads to a desire to look smart and therefore a tendency to...
Leads to a desire to learn and therefore a tendency to...
CHALLENGES
...avoid challenges
...embrace challenges
OBSTACLES
...give up easily
...persist in the face of setbacks
EFFORT
...see effort as fruitless or worse
...see effort as the path to mastery
CRITICISM
...ignore useful negative feedback
...learn from criticism
SUCCESS OF OTHERS
...feel threatened by the success of others
...find lessons and inspiration in the success of others
As a result, they may plateau early and achieve less than their full potential.
All this confirms a deterministic view of the world.
As a result, they reach ever-higher levels of achievement.
All this gives them a greater sense of free will.

## Part 2: Where to grow for maximum positive influence on others at work.

People looking to increase their effectiveness in Supervisory Roles and above have a Growth Mindset, that is a mindset oriented around learning and growing. A simple way of framing the difference, is the language of a person that says “I am no good at that” (fixed mindset) vs “I am not good at that yet” (a growth mindset actively aiming to improve and take the next step).

Most people that seek coaching are in a growth mindset, so if your client is in a supervisory role (or above) and is already open to learning to maximize their positive impact, this is a great time to introduce the REACH360.

This is a tool that provides people with feedback about their strengths and opportunities to grow from people around them. Generally, seek input from 8-16 people that are a mix of direct reports, peers, their managers and ideally suppliers or other people that are impacted by their conduct as a leader.

Using the REACH360 is simple, your client will have already completed their self-rating, so it’s just a matter of identifying the additional raters and sending them a feedback request link by email. The REACH360 only takes raters about 5-minutes and involves 16 simple questions.

You will be best to frame this activity in one session and debrief in the next.

It’s important to reiterate with your client that this can be a confronting activity, the opportunity is to learn from the perception of others, so you can adapt your approach, delegate certain functions you regularly don’t focus on, or where to consciously change your habits or approach to have a more positive impact.

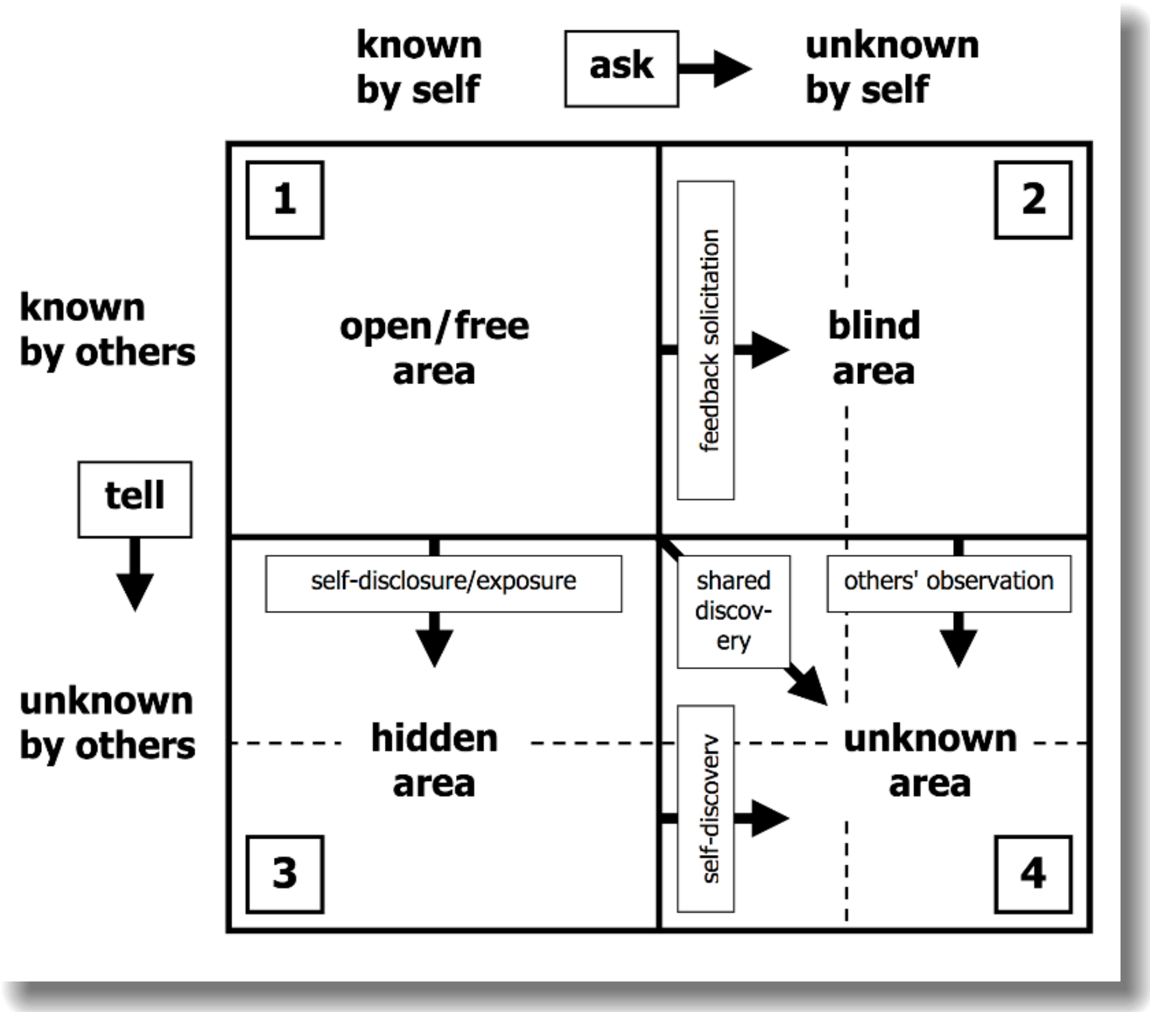
This is a powerful opportunity to boost RQ growth!

(RQ Subscribers can use unlimited 360’s, this has no additional cost, but adds a lot of value at the right time in a person’s growth journey).

## Part 3: The Johari Window

This activity explores the degree to which someone (your client) is willing to disclose things about them. It could be argued that a precondition of personal growth is vulnerability – exposing to others what you think and feel and conversely opening yourself up to what others think and feel about you.

The Johari Window created by Jo Luft and Harrington Ingham is a tool that attempts to inform the subject what they disclose about themselves to others and what other perceive about them.



Use the Johari Window template and word list in Appendix D to run the activity.

Your client is to tick/circle 10 adjectives from the list that best describe them. You do likewise, selecting 10 adjectives that you believe best describe your client. Then plot both sets of word on the template:

- Words in common – write these in the 'open' quadrant
- Words only the client chose – plot these in the 'hidden' quadrant
- Words only you (the coach) chose – plot these in the 'blind' quadrant

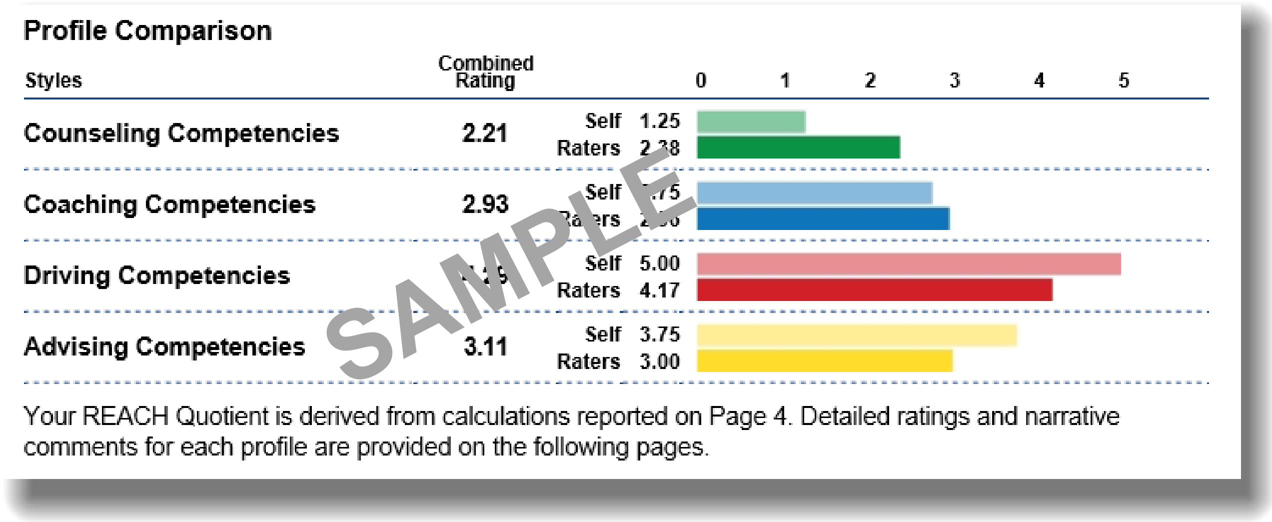
**Debrief / Discussion with client**

- Was the client surprised by the result?
- Are there qualities that the client wants others to see in them that are not being clearly communicated? What can the client do about this?
- Are there qualities that you as the coach see in the client that the client is surprised or uncomfortable with? Discuss how the client can become more aware of the impact of these qualities.

## Part 4: REACH360 Report

Now that you have explored openness for feedback with your client, it is time to review the information in their REACH360 Report.

The RQ is derived from the Self and Rater scores against the four groups of REACH competencies:




Page 4 of the report provides a drill down on each of the competencies.

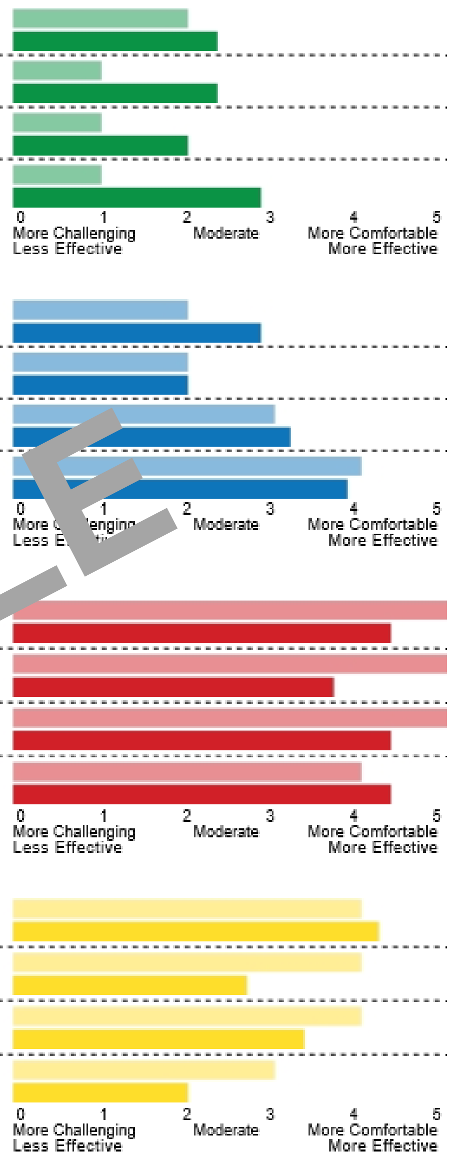
## REACH Competencies Summary

**Relating to Others**

| Competency | Self | Raters |
| --- | --- | --- |
| **Counseling Competencies (the "who")** | | |
| Assimilating team members | 2.00 | 2.33 |
| Cultivating team spirit | 1.00 | 2.33 |
| Identifying personal needs | 1.00 | 2.00 |
| Recognizing others' efforts | 1.00 | 2.83 |
| **Average Rating:** | 1.25 | 2.38 |
| **Coaching Competencies (the "why")** | | |
| Building rapport | 2.00 | 2.83 |
| Easing tensions during conflict | 2.00 | 2.00 |
| Finding opportunities for synergy | 3.00 | 3.17 |
| Rallying others around a cause | 4.00 | 3.83 |
| **Average Rating:** | [illegible]75 | [illegible]6 |

**Achieving Goals**

| Competency | Self | Raters |
| --- | --- | --- |
| **Driving Competencies (the "what")** | | |
| Establishing clear expectations | 5.00 | 4.33 |
| Evaluating individual performance | 5.00 | 3.67 |
| Exercising control over team processes | 5.00 | 4.33 |
| Guiding team during change | 4.00 | 4.33 |
| **Average Rating:** | 5.00 | 4.17 |
| **Advising Competencies (the "how")** | | |
| Addressing quality concerns | 4.00 | 4.20 |
| Aligning resources with needs | 4.00 | 2.67 |
| Designing team structure/function | 4.00 | 3.33 |
| Integrating diverse perspectives | 3.00 | 2.00 |
| **Average Rating:** | 3.75 | 3.00 |






### REACH Quotient: 3.14 out of 5.00

Your REACH Zone, shown on the LDP Matrix throughout this report, is derived from Overall REACH Ratings. On the pages that follow, you will find more detailed information regarding the ratings and observations gathered via the LDP:360 program.

The REACH360 report then goes on to explore each competency cluster and breaks the raters down into:

- Superiors
- Direct Reports
- Peers

An example is given on the next page.

## ReAching to the Counselor Profile

The Counselor encourages a welcoming and nurturing climate in which team members recognize and care for each others' interests. The Counselor answers the "who" questions to ensure that team members are appreciated and supported.

Raters were asked to evaluate the frequency and effectiveness with which you may leverage this profile. Summary and detailed results are presented below:


Based on your responses to the LDP, the Driver Profile is your primary style

**Self-Rating:** **1.25**

**Rater Categories:** **2.38** (Rater Average)

Superiors (1) 2.25

Direct Reports (2) 1.50

Peers (3) 3.00

**Gap:** **1.13** Overall, your Self-Rating is lower than the average rating provided by your raters.

SAMPLE

**Observation Statistics**

Raters were asked to evaluate the extent to which you ReAch to the Counselor Profile based on the following observations of your leading interactions.

| | | | 0 1 2 3 4 5 | Gap | Hi | Lo |
|---|---|---|---|---|---|---|
| Assimilating team members | Self | 2.00 | | | 2 | 2 |
| | Superiors (1) | 2.00 | | 0.00 | 2 | 2 |
| | Direct Reports (2) | 1.50 | | 0.50 | 2 | 1 |
| | Peers (3) | 3.00 | | 1.00 | 5 | 2 |
| Cultivating team spirit | Self | 1.00 | | | 1 | 1 |
| | Superiors (1) | 2.00 | | 1.00 | 2 | 2 |
| | Direct Reports (2) | 1.50 | | 0.50 | 2 | 1 |
| | Peers (3) | 3.00 | | 2.00 | 5 | 2 |
| Identifying personal needs | Self | 1.00 | | | 1 | 1 |
| | Superiors (1) | 2.00 | | 1.00 | 2 | 2 |
| | Direct Reports (2) | 1.00 | | 0.00 | 1 | 1 |
| | Peers (3) | 2.67 | | 1.67 | 5 | 1 |
| Recognizing others' efforts | Self | 1.00 | | | 1 | 1 |
| | Superiors (1) | 3.00 | | 2.00 | 3 | 3 |
| | Direct Reports (2) | 2.00 | | 1.00 | 2 | 2 |
| | Peers (3) | 3.33 | | 2.33 | 4 | 3 |

Information that can be gleaned on each profile type includes:

- The overall gap between the self-rating and the rater categories (average)
- Nuances in how superiors, direct reports and peers rated

In the example above the client rated themselves quite low in comparison to the ‘raters’ and is more closely aligned to how Direct Reports rated (on average). Peers rated the client consistently higher than the client did (self) for all four competencies.

**Questions to explore with the client:**

- Gaps between self and rater scores
- Variance in how peers, superiors and direct reports rate
    - Back to the Johari window - is the client showing different sides of themselves to different subgroups in their workplace and if so why?
    - How does the client’s ability to influence different subgroups relate to the ratings observed?
- Which competencies scored the lowest for self and raters and what steps can the client take to build those competencies?

## Part 5: For the next meeting

Ask the client to study both their REACH Profile and their REACH360 to highlight where they would like to focus their development/growth. In the next session you will work with the client to develop some personal growth targets.

Conclude by adopting the GROW process:

- What will be the Goal in reviewing the reports?
- What is the current Reality – to what extent do they understand the way forward in using these reports to map a growth path?
- What options do they have to develop a better understanding? This may include:
    - Having confidential discussions with peers, direct reports and superiors on the perceptions they have of them
    - Discussing the results with trusted people (e.g. family) outside of work
    - Meditation and self-reflection
    - Other?
- Wrap up – what steps will they take to achieve their goal in readiness for the next meeting

# Module 5: Development Targets

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH Personal Style Profile
- A printed, colour copy of the client's REACH360
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 5 is on:

- Reviewing all the information thus far to identify which development goals the client wants to pursue using Section 4 of the REACH Personal Style Profile as a guide
- Checking with the client if the development goals identified align with the original overall goal of the program – exploring how they are or are not supporting that original goal
- Planning with the client on how these development goals will be obtained – use the GROW model for each of them to develop steps for actions prior to the next session

### Part 1: A review of your coaching toolkit

Use your coaching questions toolkit to establish rapport at the beginning of the session:

- How was your weekend?
- How has the last week been?
- How did you get on doing x that you mentioned last week?
- How did your children enjoy…?

Opening up the session / reviewing actions:

- What have been your highlights since we last spoke?
- What has gone well for you?
- What progress have you made?
- What have you been most pleased with sine we last spoke?

Goals in Focus:

- What is important to you right now (has it changed)?
- What would you like to achieve from this session?
- What do you want to happen as a result of this session?
- By the end of the session what will you feel pleased to have achieved?
- If anything was possible what would you want?
- Describe your 10/10
- What do you want to happen?

Building on success:

- What is working well right now?
- What can you do more of that will help you move forward?
- How can you ensure this happens again?

Clarifying:

- So, can I just clarify…what you have said is….?
- Can you just tell me a bit more about….?
- So, if I have heard you correctly you have done…?

Exploring options:

- What would work for you?
- What options do you have for moving forward?
- What else could you do?
- If anything was possible what would be your ideal course of action?
- How have you handled this successfully in the past?
- Who do you know who has been in a similar situation…(wait for response)… how did they handle the situation?
- If you were advising a friend what would you suggest?
- If you did know what to do what would the answer be?

Challenging:

- Last session you said x and now you are saying y…which is the truth/reality/more important?
- If I were to challenge you to complete this by next week what would be your reaction?
- Using the coaching questions toolkit to unstick/get movement
- If you did know the answer what would it be?
- What question would you like me to ask you?
- What question should I be asking you?

Measurement of progress or commitment:

- On a scale of 1 -10 what progress have you made so far in achieving your goal?
- On a scale of 1 – 10 how committed/motivated are you to carrying out this action?
- On a scale of 1 -10 where are you in relation to…?

Stimulate deeper thinking:

- What are you not facing up to?
- What are you pretending not to know?
- If you did know the answer what would it be?
- What is the real issue here?
- What would your best friend be saying to you right now?
- What is really important to you?

Exploring values/unlocking motivation:

- What is really important to you right now?
- What would you like people to say about you?
- When things were going well for you what was happening?
- When did you last feel energized...what was happening for you?

Agreeing on Action:

- What is your way forward?
- Which option most excites you?
- What one small action/step are you now going to take?
- How are you going to do it?
- When exactly will you do it?
- Who will help you?
- On a scale of 1 -10 how committed/motivated are you to achieving this?
- How will you ensure you do it?

## Part 2: Link Back to Previous Sessions

Refer back to their Personal Style Profile from Session 1.

Ask them to reflect on how their default approach may have positively contributed to situations and relationships.

Ask them how they may have been able to adapt their approach in certain situations (whether that be situationally "I could have spent more time or less time planning", or interpersonally "I shouldn't have avoided the conflict" or "I could have been more diplomatic").

If you used any Strengths Poker or a Strengths Finder tool of some type before, refer back to the strengths they identified and ask your client how often they lived in alignment with those strengths, how they felt, and how it impacted those around them.

## Part 3: Review your client's Development Targets

One way to bring clarity to your client on what growth opportunities to pursue is to revisit the Development Targets in their Personal Style Profile.

Part of a typical client report is given below.

### Section 4: Coaching Points

The following characteristics represent five key strengths that have emerged from the dimensions highlighted in your Personal Style Profile. These strengths are those which are likely most evident in your response to goals and relationships. Since each strength can present a unique challenge if underutilized or taken too far, specific developmental points are provided as well.

**Intuitive (Decision-making)**

- [ ] **Key Strength:** You think quickly on your feet and are comfortable learning as you go. Where others can get lost in the details, you offer a big picture perspective. Your use of intuition and experience in taking action may make others uncomfortable, but you provide an important gut check for decisions.
- [ ] **Development Target:** Be careful not to dismiss the value of careful analysis offered by others who may not share your instinctive approach.



**Objective (Consideration)**

- [ ] **Key Strength:** You tend to remain objective where others may become emotionally involved in making decisions or solving problems. Others can rely on you for an impartial perspective. Your objectivity can provide great balance in approaching complex problems and your desire to stay on task can keep the team moving along.
- [ ] **Development Target:** At times your approach may be viewed as cold or harsh by more sensitive team members. Take care to soften your comments as you stay on message.

A suggested way to approach a discussion on development targets is as follows:

- Discuss each development target in turn:
    - Ask the client for their understanding of what the statement means
    - Ask the client if they can point to any examples where they were aware of exhibiting the behaviour
    - Alternatively reflect with the client on how that behaviour could manifest itself
    - Reflect on instances known to the client where others have behaved in this manner and what impact this had on others
    - Reflect on the Johari Window activity – could the client be blind to these behaviours at times, and if so, what could the client do to increase their awareness of this behaviours within themselves
- Invite the client to select one to two development targets that they would like to work on
- Use the GROW model to determine the next actions the client could take to develop competence in the chosen areas

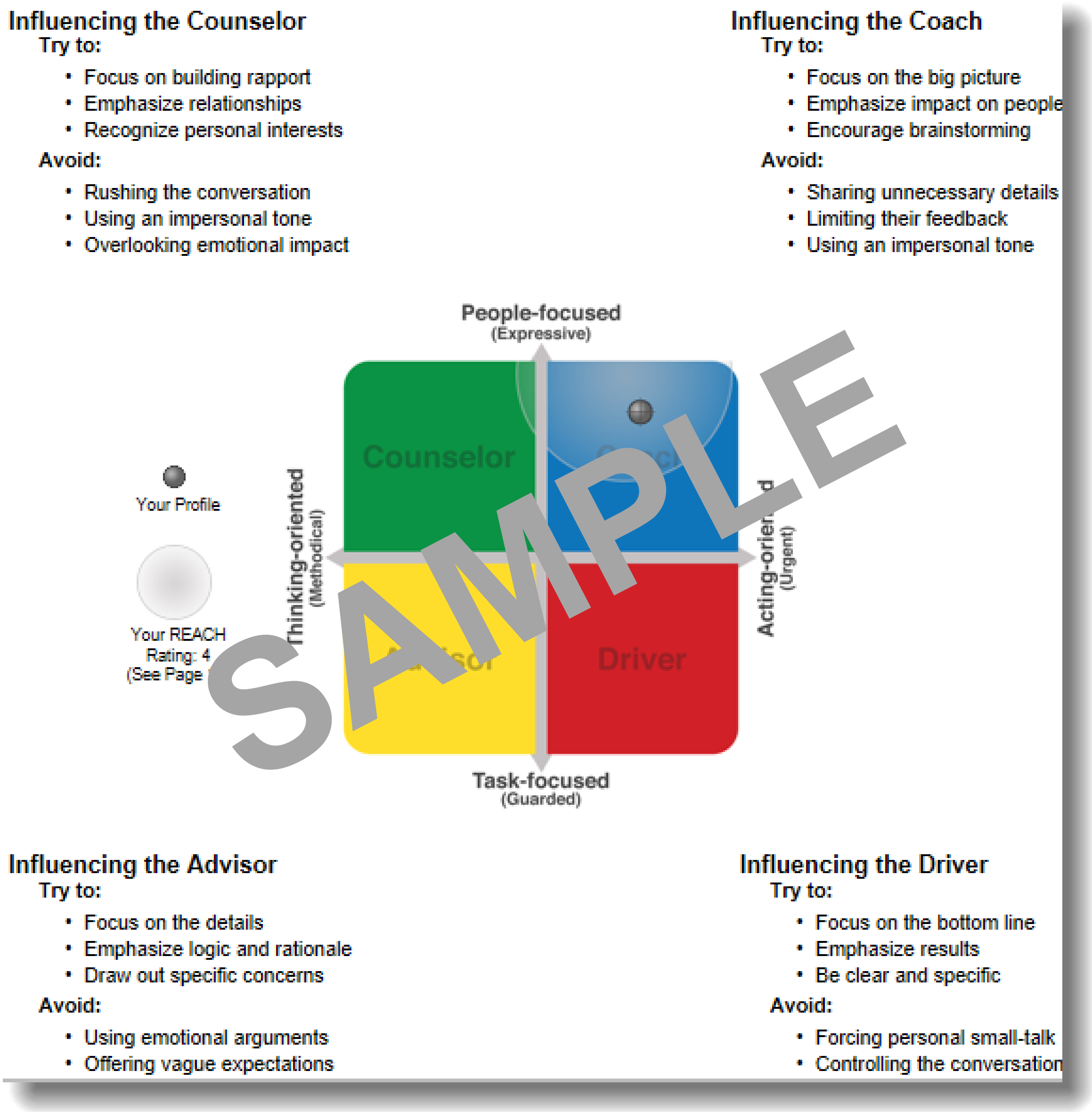
## Part 4: Review your client’s REACH360

If you haven’t already done so earlier, in this session review the REACH360 report now that your client has had a chance to consider it more deeply.

The REACH360 report contains a lot of rich information on the client’s current level of REACH into each of the four profiles

In this session take the time to identify situational behaviours of these important people as being traits of their style and reflect on how your client can recognize those traits for what they are, how they can work with those traits for greatest mutual benefit, and how they can purposefully make the most of the combination of personality approaches.

The image below (included in your reports) is a great page to use to frame the linking and coaching focus for impactful relationships and RQ Growth.


**Influencing the Counselor**

Try to:

- Focus on building rapport
- Emphasize relationships
- Recognize personal interests

Avoid:

- Rushing the conversation
- Using an impersonal tone
- Overlooking emotional impact

**Influencing the Coach**

Try to:

- Focus on the big picture
- Emphasize impact on people
- Encourage brainstorming

Avoid:

- Sharing unnecessary details
- Limiting their feedback
- Using an impersonal tone



**Influencing the Advisor**

Try to:

- Focus on the details
- Emphasize logic and rationale
- Draw out specific concerns

Avoid:

- Using emotional arguments
- Offering vague expectations

**Influencing the Driver**

Try to:

- Focus on the bottom line
- Emphasize results
- Be clear and specific

Avoid:

- Forcing personal small-talk
- Controlling the conversation

When considering the REACH360, work with your client to determine which part of the report the client would like to focus on.

As an example, consider the sample report below which is showing the section on '*REACHing to the Advisor Profile'*

As was highlighted in Module 4, the first image shows the Self and Rater scores against the four competencies and a summary of the Self Rating and Rater Average.

**LDP:360** **LDP:360 Feedback Report** **Sam Sample** **2 May 2018**

# ReAching to the Advisor Profile

The Advisor is recognized for maintaining a stable and structured work process in which resources are used to maximize team members' efficiency. The Advisor answers the "how" questions to ensure the team operates in an orderly and consistent manner.

Raters were asked to evaluate the frequency and effectiveness with which you may leverage this profile. Summary and detailed results are presented below:


Based on your responses to the LDP, the Advisor Profile is your primary style

**Self-Rating:** **3.75**
**Rater Categories:** **3.00** (Rater Average)
Superiors (1) 3.50
Direct Reports (2) 3.50
Peers (3) 2.45

**Gap:** **0.75** Overall, your Self-Rating is higher than the average rating provided by your raters. This may be a blind spot within your leadership style.



**Observation Statistics**
Raters were asked to evaluate the extent to which you ReAch to the Advisor Profile based on the following observations of your leading interactions.

| | | | Gap | Hi | Lo |
|---|---|---|---|---|---|
| Addressing quality concerns | Self | 4.00 | | 4 | 4 |
| | Superiors (1) | 4.00 | 0.00 | 4 | 4 |
| | Direct Reports (2) | 4.50 | 0.50 | 5 | 4 |
| | Peers (2) | 4.00 | 0.00 | 5 | 3 |
| Aligning resources with needs | Self | 4.00 | | 4 | 4 |
| | Superiors (1) | 3.00 | 1.00 | 3 | 3 |
| | Direct Reports (2) | 3.50 | 0.50 | 4 | 3 |
| | Peers (3) | 2.00 | 2.00 | 2 | 2 |
| Designing team structure/function | Self | 4.00 | | 4 | 4 |
| | Superiors (1) | 4.00 | 0.00 | 4 | 4 |
| | Direct Reports (2) | 4.00 | 0.00 | 4 | 4 |
| | Peers (3) | 2.67 | 1.33 | 3 | 2 |
| Integrating diverse perspectives | Self | 3.00 | | 3 | 3 |
| | Superiors (1) | 3.00 | 0.00 | 3 | 3 |
| | Direct Reports (2) | 2.00 | 1.00 | 2 | 2 |
| | Peers (3) | 1.67 | 1.33 | 2 | 1 |

Particularly poignant is the comments section that follows the ‘Observation Statistics’.

In our example, the comments left by raters were as follows:

LDP:360 Feedback Report | Sam Sample | 2 May 2018

## Comments on ReAching to the Advisor Profile

Raters were asked to provide optional comments regarding your utilization of the Advisor Profile. Any comments provided are shown below:

- Samantha is all about efficiency. She moves quickly, and makes changes where needed to ensure the team is focusing on the right goals.
- When quality is not what it should be, Sam is quick to make changes. She sets big goals for the team, and expects all of us to deliver on our part.
- If a process or procedure is not working well, Sam is very quick to make adjustments. She is never one to let a problem fester. If anything, there may be times when she reacts too quickly without gaining input from team members who could offer valuable insight.
- Sometimes Samantha can give a “my way or the highway” impression to team members, which may make some reluctant to offer diverse perspectives. She maintains an efficient budget but may not take sufficient time to gain input from team members regarding departmental needs.



The comments provide a narrative for the raw scores and a meaningful basis for reflection by the client.

As stated in Part 3 above, you can lead a discussion with the client to explore the meaning they attribute to the scores and comments and then to crystallize one or more development targets.

A suggested way to approach a discussion is as follows:

- Ask the client for their understanding of what the rater’s scores and comments mean and how the client’s behaviours and actions/inaction may lead to those views being expressed
- Ask the client what areas of growth they can identify for themselves based on the information presented
- Establish one or more developmental goals. Make sure the goal(s) is well defined and achievable. You may like to use a helpful method SMART:
    - S = specific/significant/stretching
    - M = measurable/meaningful
    - A = achievable/acceptable
    - R = realistic/relevant/reasonable
    - T = time-based/time-bound
- Use the GROW model to determine the next actions the client could take to develop competence in the chosen areas

# Module 6:  Practicing REACH

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH Communication Profile
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 6 is on:

- Discussing the essential attributes for communicating with different profiles
- Reviewing the strengths of your client's communication profile and the coaching areas identified
- Planning a forthcoming scenario with your client to enable them to practice their REACH
- Check in on goals identified in previous sessions and progress to date. Use the GROW model for each of them to develop steps for actions prior to the next session

### Part 1: Review of Communication Profile

Advise your client to review their REACH Communication Profile ahead of this session.

This report provides general information on each of the profiles, how best to interact with each profile type and more detailed information on the client's profile type and how it influences specific behaviours including communication.

The specific behaviours comprise:

- Focus
- Communicating
- Conflict-handling
- Decision making

**Section 2** of the report contains generic information on interacting with each of the four profile types.

LDP+ Communication Profile    Sam Sample    6 May 2018

# Section 2: Profile Interactions

Whether building rapport with strangers or discussing a challenging topic with a long-time associate, communication can be enhanced when you learn to "stretch" or mirror the other profiles. Although difficult early on, practice can make the stretching feel more natural over time – allowing you to recognize and interact with people from all four profiles with ease.

### Interacting with the Counselor

**Try to:**

- Build genuine rapport
- Affirm what you hear
- Recognize personal interests

**Avoid:**

- Rushing the conversation
- Using an impersonal tone
- Overlooking their concerns

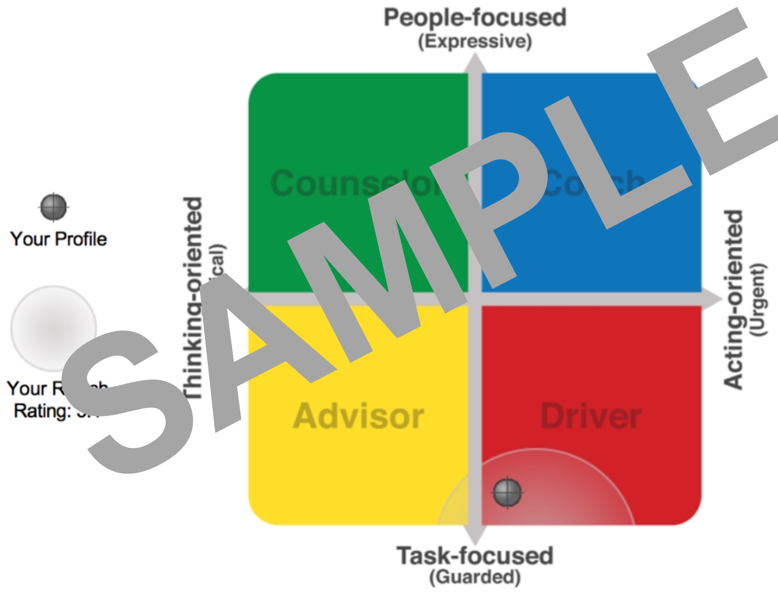
### Interacting with the Coach

**Try to:**

- Focus on the big picture
- Emphasize impact on people
- Encourage brainstorming

**Avoid:**

- Sharing unnecessary details
- Limiting their feedback
- Using an impersonal tone




### Interacting with the Advisor

**Try to:**

- Focus on the details
- Emphasize logic and rationale
- Draw out specific concerns

**Avoid:**

- Using emotional arguments
- Offering vague expectations
- Pushing for a conclusion

### Interacting with the Driver

**Try to:**

- Focus on the bottom line
- Emphasize results
- Be clear and specific

**Avoid:**

- Forcing personal small-talk
- Controlling the conversation
- Challenging their position

Note the sentence in the opening paragraph about 'practice'. The aim of this session is plan with the client how they can practice exercising their REACH.

**Section 3** of the Communication Profile provides more specific information on the client’s communication profile.

LDP+ Communication Profile | Sam Sample | 6 May 2018

# Section 3: Profile Overview

Our personality drives how we approach people and tasks. This section provides practical observations regarding how your preferred profile influences specific behaviors.

### Focus: *Accomplishing*

Drivers tend to push (drive) themselves continually toward the accomplishment of specific objectives. So, by the time a particular goal is in sight, they may already be looking to the next challenge, without stopping to enjoy any one accomplishment for very long. While this sense of mission and purpose can be very rewarding and can generate very high productivity levels, it can also contribute to burnout and other personal concerns over time.

### Communicating: *Focused*

The Driver's communication style is usually seen as very direct and formal, while generally lacking warmth. The Driver is typically reluctant to share personal information or experiences with others (outside of their close friends or family). Their approach allows the Driver to convey important information in a concise manner. As such, their direction keeps others “on-task” without contributing too much confusion or misunderstanding. Others will know where the Driver stands on an issue.



### Conflict-handling: *Competing*

The Driver may choose a competitive approach to conflict. As their attention is mostly focused on accomplishing the mission, the Driver views conflict as a distraction that must be dealt with quickly. While others may seek to avoid or accommodate the source of conflict, the Driver is much more likely to confront it head on. Others will notice the Driver's resilience in the face of challenge and will likely appreciate their steadfast approach to maintaining focus.

### Decision-making: *Decisive*

The Driver is known for a propensity to take decisive action, particularly when pursuing a specific mission or goal. The Driver prefers to focus their efforts on achieving the overall objective, and is comfortable accepting considerable uncertainty in the process. While others may be very cautious and meticulous in their preparation, the Driver is more than willing to go it alone if necessary to take advantage of opportunities others may miss.

### Potential Strengths

- Intensely focused on goal attainment
- Flexible in trying new approaches
- Risk tolerant
- Highly assertive
- Self-reliant
- Formal and professional in demeanor
- Objective and rational in decision-making
- Focused on task accomplishment

### Potential Challenges

- Reluctant to conduct detailed planning
- Overly confident in their gut instinct
- Frustrated by structure and bureaucracy
- Likely to make inconsistent decisions
- Reluctant to offer feedback or ideas
- Uncomfortable in a highly collaborative environment
- Considered cold or harsh when under stress
- Viewed as impatient and uninterested with others

You will note the potential strengths and potential challenges.

Suggestions for exploring your client's communication profile is as follows:

- Reviewing the REACH360 and the rater scores and comments and identifying any that be may be linked to communication style and potentially to the challenges highlighted in the Communication Profile report.
- Review the sphere of influence activity from Module 3. Ask the client to revisit the key people he/she would like to influence more. Work with the client to classify these people according to their potential profile type. Then review how each of them would prefer to interact. Some questions for the client to consider:
    - Do you usually interact with people in the same way?
    - Are there some people that you would like to influence more who may require a different communication approach based on their profile?
    - What can you do to change how you interact with them - what do you need to be conscious of?

## Part 2: Plan (or review) an opportunity to practice REACH

Across this journey we have looked at the most important people, strengths, gaps, personal awareness and situational awareness.

A very impactful coaching session can be achieved by asking your client to share a situation they can either foresee coming up this week, or that happened in the previous week.

You'll add value to your client if you identify a scenario with them that they want to handle really well, and plan it together using the following structure:

- What is the scenario?
- What are the best and worst outcomes?
- Who else is impacted?
- Where will it take place?
- When will it take place?
- What strengths does your natural profile bring to the situation?
- What will your natural profile tend to focus on too much/overlook without adapting?
- How can you adapt your approach to be more effective?
- What are the personality types of other people in the scenario?
- How can you adapt your approach to be more conscious of their profile needs and approach?

Then, together work through planning by asking questions that lead your client to reach their own conclusions and develop their own strategy.

**Tip:** You can lead them by using materials from your relevant training materials such as conflict resolution, performance appraisals, negotiation skills etc

Remember to debrief with your client next session to see how it went and use the experience as a learning opportunity – regardless of the outcome.

# Module 7: Expanding REACH

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH REACH Quotient
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 7 is on:

- Developing your client's ability to grow their REACH into each of the four profile types
- Check in on goals identified in previous sessions and progress to date. Use the GROW model for each of them to develop steps for actions prior to the next session

### Part 1: Preamble

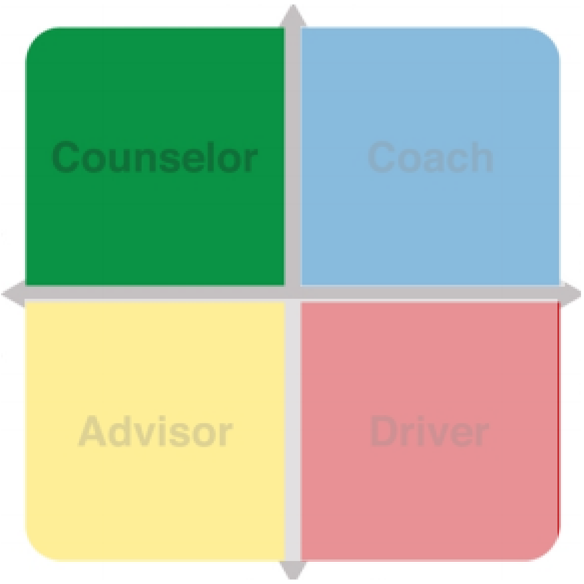
Developing agility and RQ stems from awareness and purposeful stretching and adapting for a sustained amount of time – the longer people maintain the purposeful choice to "*shift gear",* the easier and more natural it will become – their RQ will grow.

During your coaching relationship you will identify situations, or simply a desire from your coachee, to actively focus on one or more specific dimensions of their REACH.

Growing is hard and takes conscious effort – as well as a willingness to fail as part of the process. As such, the activities and suggestions below will frequently put your coachee well out of their comfort zone; sometimes virtually setting them up for failure on their first attempts. Responsible coaches will pick when to try different approaches, and frame for the coachee that as Wayne Gretzky (one of the greatest ice hockey players of all time) is famously quoted as saying "You miss 100% of the shots you don't take", however to get good at something you need to take the shot and get practice.

Help your coachee pick their times to take the shot to practice for the 'main event' – which is a better quality of life and better relationships every day.

## Grow your client's ability to REACH into 'Counsellor'




Your text here

*Start the conversation:*

When you recognize someone could benefit from growing their RQ into Counsellor, listen for comments like the ones below or use these as conversation starters (ask something like "can you relate to comments like these?") if you sense there is something, and then dig deeper (see digging deeper).

### *My Team needs me to be more of a Counsellor*

a) I work with someone who is clearly a Counsellor, I don't think the way I am managing things is useful for me, them or the team.
b) We have significant change going on at work and some people who I expect are Counsellors, are struggling, I am finding it difficult to relate, I want to do better.

### *My plans at work aren't working out, what am I missing?*

c) I get great ideas to improve things at work, I see how it can work and the great results we can get, but no one really gets on board.
d) I find I am always chasing my tail, details and things keep springing up and surprising me, I can make decisions on the fly, but they're not always right, where am I going wrong?

***I have customers who want to talk talk talk, I just want to get things sorted with them and move on, how do I get them to stop talking?***

e) I am in sales, and I have prospects who research everything and just want to chat about their kids and families, I need them to make a decision, so I can get to the next prospect, time is money!
f) I am in Customer Service and I want to help as many customers as I can (I don't like seeing people on hold) and I am measured on the amount of calls I resolve, so it's my job, some customers spend forever telling me about all this stuff, but I don't need to know to help them, what can I do?

### *Digging Deeper*

When you hit on a point that strikes a chord, it's important to really understand the challenge, use some of the following techniques:

- Paraphrase three to five times using statements like:

  "So, have I heard correctly that you find ____"?

  "Have I got the most important parts if I describe the situation like this ____"?

- Ask clarifying questions when you're confused about the facts or to fill in blanks.
- Remember, avoid problem solving or coaching, just get clear about the situation.

### *Opening up for RQ Growth*

Try the following sequence with your coachee:

1. Remind ourselves what a 'Counsellor Profile' tends to focus on – People and Detail (to keep it simple).
2. Contrast it to your coachee's default approach.
3. Ask your coachee to think of a time when a stronger focus on people or detail than their natural approach was important (family, sport, work teams, product design etc).

### *Use the specific situation to unpack the differences*

Referring back to the situation of concern, ask your coachee to look at why the Counsellor profile has benefits in this situation? Here are some examples matching to different Conversation Starters above to help frame the conversations:

| Conversation starter | Coach reframing questions |
|---|---|
| **b) We have significant change going on at work some people, who I expect are Counsellors, are struggling, I am finding it difficult to relate, I want to do better.** | If you have a lot of change going on, if counsellors are concerned with people, do you think they may be resisting out of concern for their colleague's position?<br>Or if Counsellors value detail, thinking about the communication so far, do you think they have been provided with enough information for them to get on board? |
| **d) I find I am always chasing my tail, details and things keep springing up and surprising me, I can make decisions on the fly, but they're not always right, where am I going wrong?** | You're not naturally inclined to focus on people and details to the extent a Counsellor is, so are any of the things that caught you out; detail or people oriented? |
| **e) I am in sales, and I have prospects who research everything, and just want to chat about their kids and families, I need them to make a decision so I can get to the next prospect, time is money!** | My impression of sales in the current world is that having a good quality conversation to build trust with a prospect is rare, when coaches are sharing about their family or their research into the process, could this be an opportunity? |

### *Moving Forward:*

Now it's time for your coachee to begin to grow their RQ, and there's many options to take here, which will depend on the circumstances. In general, they break down to two different approaches:

1. This month when the situation arises, I am going to shift gear into 'Counsellor Profile' and ______ (from the conversation starter scenarios):
    - and deliver my communication with enough detail to meet the needs of counsellors,
    - and approach a counsellor to help me plan the people impacts of project, so I don't miss those details again,

- and see the opportunity to build trust, then use the ______ technique to progress the conversation.

2. This month I am going to proactively seek out the input from ______ (a counsellor profile in my team) and seek their input, so I gain a different perspective before the situation arises:
   - and plan my communication including their input,
   - schedule meetings with agenda that reflect their perspective,
   - ask them to help me explain situations in ways that other counsellors will relate to.

### *Set a plan*

On _______ or when _______ happens I am going to _______ with a goal to _____

(Encourage reflection)

### *Set an expectation for review for reflection and growth*

"Next session let's discuss how it went, what we can learn, and what we'll add to be more effective stretching to Counsellor next time"

## Part 2A: Activities to develop specific Counselling competencies

Depending on where your coachee is at with their confidence in applying the models, you may want to help them develop their competencies by using the activities that follow. Two activities have been suggested for each competency. You and the coachee may decide to use either or both of these activities.

### *Assimilating team members [competency]*

### *Activity: New manager assimilation*

*(Note: the concept for this activity is taken from PD Training's "Team Building" course)*

This activity can be completed when a manager (your client) is relatively new to their team and ideally should be conducted after the team has had time to settle in – say approximately three months.

### *Part 1 – Preparing reflective questions*

In this activity brainstorm with the client a series of questions that the client can have their team answer and questions they can answer themselves.

The client should then distribute the questions to their team, allowing sufficient time for them to reflect on the answers, and bring those answers with them to the facilitated assimilation session.

### *Part 2 - Facilitated assimilation session*

This should be a facilitated session between the client and their team. During the session (allow up to two hours) the client reveals the answers to the questions they asked of themselves. The team then reveal the answers to their questions.

The desired outcome of the session is to gain a greater understanding of each other.

In a follow up coaching session, you can debrief the results of the facilitated assimilation session.

++++++++++

The following are suggestions only. Work with your client to produce a list that is meaningful to her/him.

**Reflective questions for the team to consider**

"About Us" Questions:

- What do you want your new boss to know about this team?
- How can your new manager help this team be successful?
- What do you enjoy doing outside of work?
- What do you see as the biggest challenge the team is facing?
- What is it that you enjoy about working here?
- How would you describe this team in one word?

Expectations of the manager:

- What do you expect of your new manager?
- What do you need your boss to be aware of when it comes to managing this team?
- How do you want your manager to communicate with you? Email, phone, etc?
- How much contact do you expect/need from the manager?
- What can your new manager do to make him/her successful?
- What “hot buttons” does your new boss need to be aware of?

### ***Reflective questions for the manager (client) to consider about themselves***

“About You” questions:

- What do you enjoy doing when you are not working?
- How would your family and friends describe you?
- What are the values that drive you?
- What has been your career progression?
- How do you maintain work/life balance?
- Where would you like to go on vacation if you had a month off and money was no object?
- What are your career aspirations?
- Tell us about your family, kids, hobbies.
- Where did you grow up? Where else have you lived?

Management style:

- Are you a hands-on boss, overseer or highly involved manager?
- What are your “hot buttons?” What are those things that really annoy you and that we should avoid?
- What principles do you value highly in people who work for you?
- How should we balance what you want to be kept informed of?
- How would you describe your management style? How has it changed over time?
- What is your preferred mode of communication? Phone, email, etc?

Expectations:

- What are your goals for the first 6 months and where do we fit into this vision?
- What perceptions do you have coming in to our organization?
- What similarities/differences do you see in this business as compared to prior businesses you have worked in? What can you apply here?
- What are your expectations of staff work/life balance?
- What are your expectations of our working hours and accessibility?
- Do you expect staff to be engaged on weekends? Respond to weekend messages?

- What are your priorities and what do you see as the major obstacles our business needs to overcome?
- What are your top 3 priorities for us?

## *Activity: First Day, First Week*

*(Note: the concept for this activity is taken from PD Training's "Employee Onboarding" course)*

New team members need to feel welcome, need to feel they belong and need to feel they can make a difference from day one. Crucial to creating a sense of belonging is to plan in detail what the new employee will be exposed to on their first day and during their first week.

During this activity, work with your client to develop a checklist of the first day and first week onboarding activities that the new employee will complete.

Some broad themes to explore with the client include:

- What will make the new employee feel welcome?
- What people things need to be done of day 1?
- What settling in activities need to be done on day 1?
- What do you want the employee to absorb about the organization's culture?
- What expectations may the employee have?
- What support will be available for the employee?
- What would the employee like to debrief/review in week 1?

Therefore…

| What is on the checklist for Day 1? | What is on the checklist for Week 1? |
| --- | --- |
| | |

### *Cultivating team spirit [competency]*

### *Activity: Involve your team in creating an upbeat culture*

*(Note: this activity is taken from PD Training's "Building Creativity and Problem Solving" course)*

In the first part of this activity brainstorm with your client actions they can take with their team to create an upbeat culture.

Some suggestions are given below. Work with your client to determine what else could be added to this list:

| | | |
|---|---|---|
| Encourage fun | | Positive reinforcement |
| | Gratitude | |
| Motivation | | Celebration |
| | Change the way you respond | |
| | Acts of kindness | |

In the second part of the activity, consider one or more of these ideas and how to put them into practice. Brainstorm with your client what they can do personally and what they could try to do with their team.

| **Idea 1** | **What I can do personally** | **What I can try with my team** |
| --- | --- | --- |
| | | |

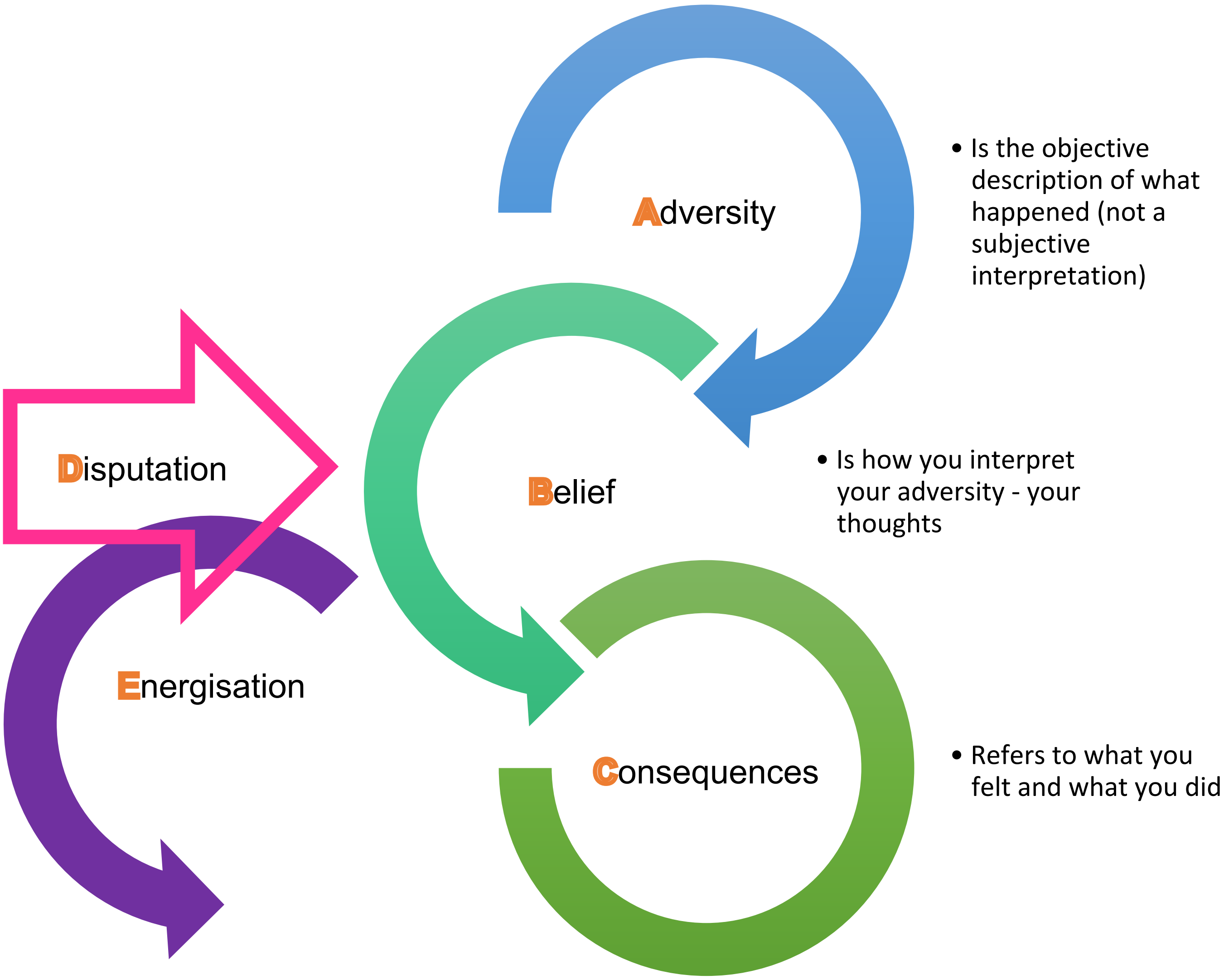
| **Idea 2** | **What I can do personally** | **What I can try with my team** |
| --- | --- | --- |
| | | |

## *Activity: Learning to be optimistic*

*(Note: this activity is taken from PD Training's "Building Creativity and Problem Solving" course)*

This activity can be used by the client and the client can use the activity with their team.

Seligman (1990) argued that a person could work on their explanation for an adverse event that happens to them, and in so doing argue against their pessimistic beliefs.




The Disputation step involves disputing your beliefs about the adverse event through examining:

- Evidence – what evidence and facts support your beliefs?
- Alternatives – what alternative explanations for the event exist – consider changeable, specific and non-personal causes
- Implications – if your belief is correct are the implications that follow correct?
- Usefulness – how useful is it to hold on to this belief?

The Energisation step comes from applying the model and the net gain in energy resulting from challenging your beliefs.

An example of applying the ABCDE Model (adapted from Magya-Moe 2009)

| | |
|---|---|
| **Adversity** | I received a negative review from my boss at work.<br>She said that I am not outgoing enough to work the sales floor and therefore is going to have me work in stock control instead |
| **Beliefs** | I have been working really hard and obviously it does not matter. I hate my boss and this stupid job. I don't want to see her or anyone at work for that matter. I am fed up with the whole thing |
| **Consequences** | I got my review two days ago and am still furious. I really want to tell my boss off and then quit so that she can deal with covering my hours for the next week. I called in sick already yesterday since I could not fathom seeing her. I don't know what I am going to do tomorrow though. I am scheduled to work a double shift and don't have any more sick days left. |
| **Disputation** | Although I think my boss could have been more fair in my review, she is probably right that my personality is not as naturally outgoing as many of the other salespeople. I am not always comfortable talking to all of the customers and that probably shows through, but at the same time, I am not completely incapable as she made it seem. I guess she must see this on some level since she still wants me to work there, just in a different position.<br>If she really disliked me, she could have just fired me. Maybe I am taking this too personally. I really do like my colleagues and the pay is pretty good. I guess in the stockroom I will have more time to interact with my colleagues and I don't have to worry so much about my wardrobe. Professional work clothes are expensive! |
| **Energisation** | I feel much less angry. I am still a little bothered by how the review focused only on the negatives, but I know my boss had a lot of reviews to do that day, so she was probably just trying to conserve time. It was hard to admit that I am not as outgoing as some of my colleagues, but I do realize that this is the case. I am actually looking forward to spending more time with my colleagues in the stock room and not feeling so on edge all the time. |

Now get the client to think of an adverse situation that has occurred recently and ask them to recall their thinking and how they felt. Use the prompts in the table below to assist.

| | |
|---|---|
| **Adversity** | Describe a recent adverse event<br>Include the what, when, who and where<br>Be specific and accurate<br>Be objective<br>Stick to the facts |
| **Beliefs** | Record what you were saying to yourself at the time<br>What was running through your mind?<br>Write it down verbatim<br>Be honest |
| **Consequences** | Record the consequences of your beliefs<br>List all the emotions you felt<br>List all the reactions you can identify |
| **Disputation** | Generate one piece of evidence to point out the inaccuracy in your beliefs<br>or, generate a more accurate/optimistic Alternative belief about the adversity<br>or, if your beliefs are correct do the implications make sense, i.e. what is the most likely outcome |
| **Energisation** | Describe how the Disputation changed your energy<br>What happened to your mood?<br>How did your behaviour change?<br>What solutions do you see that you didn't see before? |

### *Identifying personal needs [competency]*

## *Activity: Identifying and overcoming a weakness*

*(Note: this activity is taken from PD Training's "Identifying Differences as Opportunities" course)*

This activity explores potential weaknesses (as opposed to strengths) and how that weakness can be overcome. The client can explore personal weaknesses and they can also use this technique with team members to identify and overcome their weaknesses.

| | |
|---|---|
| **Describe an activity at work you dislike doing** | |
| **Describe why you dislike it** | |
| **How does doing this activity make you feel?** | |
| **Do you have all the skills and knowledge to competently perform the activity?** | |
| **Can you change when and how you complete the activity?** | |
| **Are there benefits to you or the organization in completing this activity? What is the upside, what are the positives?** | |
| **Can you utilize more of your strengths in completing the activity?** | |
| **Will gaining more confidence in performing this activity help moderate this weakness? If so how will you do this?** | |

## *Activity: Identifying personal development needs*

*(Note: this activity is taken from PD Training's "Identifying Differences as Opportunities" course)*

The American Society for Training and Development's (ASTD) Strategic Needs Analysis, have developed six steps managers can use to better target the personal development of their team members:

- Review team members' job descriptions
- Meet with them
- Observe them at work
- Gather additional data
- Analyse and prepare data
- Determine action steps

The following questions can also be asked:

- What challenges do you face every day?
- What is most frustrating about your role?
- What areas of your role, or the organization, do you wish you knew more about?
- What skills or additional training would help you work more productively or effectively?

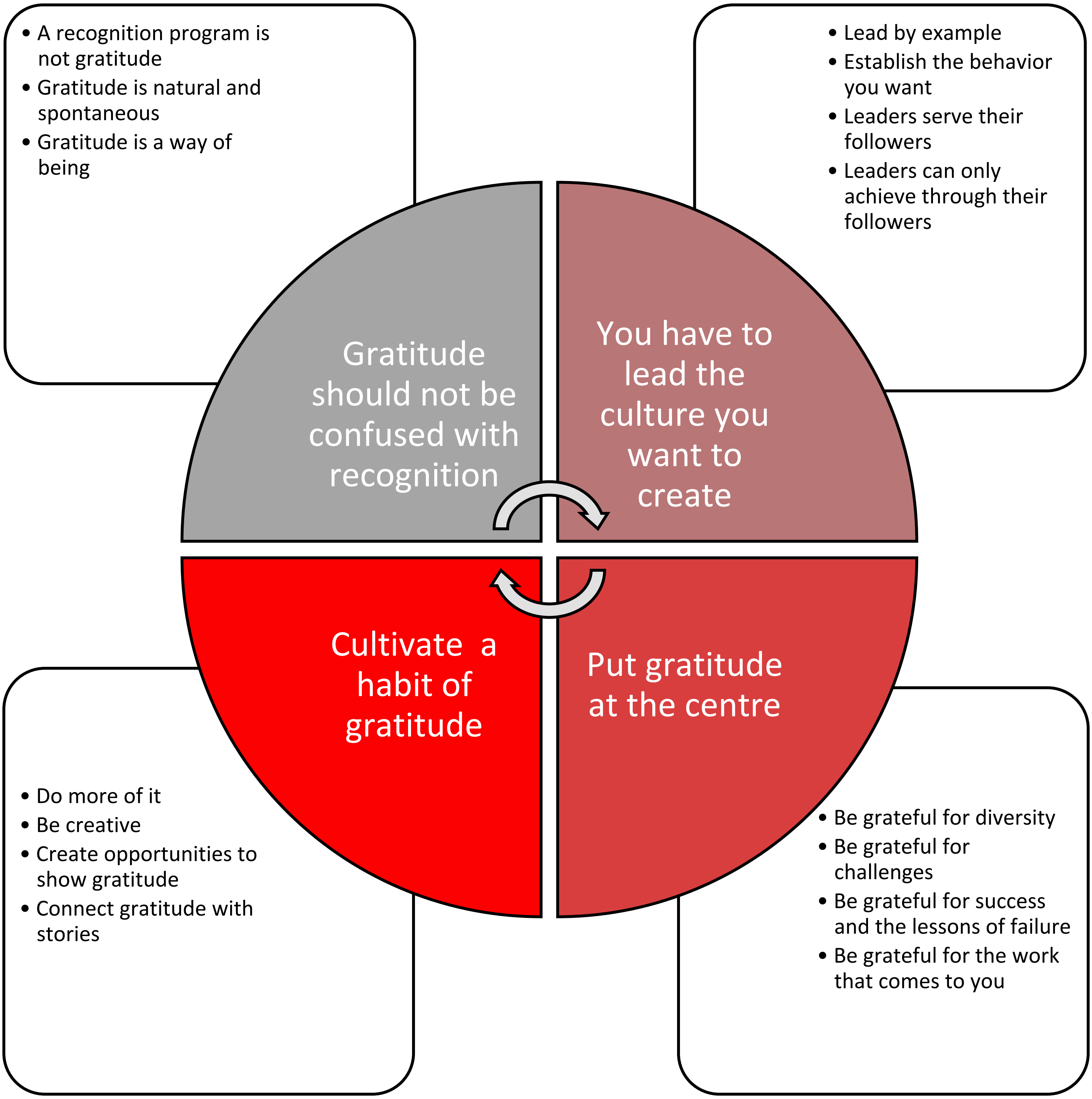
Encourage the client to hold a 1:1 discussion with each of their team to determine their individual development needs.

## Recognising other's efforts [competency]

### *Activity: Creating a culture of gratitude*

*(Note: Taken from PD Training's "Identifying Differences as Opportunities" course)*

Gratitude is one of the 24 character strengths identified by Petersen and Seligman – it is giving thanks and showing appreciation. It is core to attaining a state of happiness.



***Workshop the following questions with your client:***

What opportunities do you currently exploit to show your gratitude?

What other opportunities could you use to do so?

How do you currently show gratitude in your team?

In what other ways could you show gratitude?

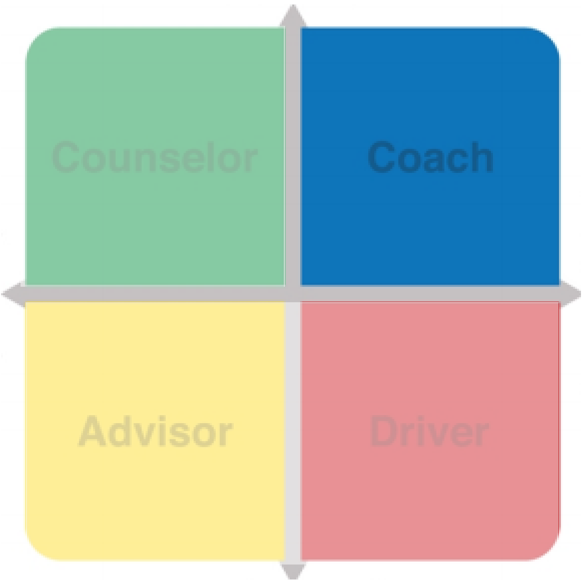
### *Activity: Johnny the bagger*

*(Note: this activity is taken from PD Training's "Identifying Differences as Opportunities" course)*

This activity demonstrates the power of gratitude for both the giver and receiver. Watch the video then reflect with your client on what this means for them and for their workplace.

https://www.youtube.com/watch?v=qOZPlt3Ha0Y

## Grow your client's ability to REACH into 'Coach'




### *Start the conversation:*

When you recognize someone could benefit from growing their RQ into Coach, listen for comments like the ones below or use these as conversation starters (ask something like "can you relate to comments like these?") if you sense there is something, and then dig deeper (see digging deeper).

### *Engaging with my Colleagues*

a. There are people at work who talk a lot and jump from one thing to the next, I am finding it difficult to relate, they're always talking and missing important details, I find it frustrating.
b. I need to engage people more effectively, I feel like I am the one left out all the time, how do I become more effective at sharing ideas and talking?

### *My ideas aren't heard, my plans aren't followed through, how do I get heard?*

c. I get great ideas to improve things at work, I work out all the details, but no one really seems interested, how do I get people more excited?
d. _____ always talks more loudly than I do, and people like to follow their ideas more, how do I make things more exciting like _____ does?

### *I want to engage my customers better – how do I grow my coach?*

e. I am in sales, a few people I work with have a really good approach to 'make a friend and let them buy from you' and they sell more than I do, how can I do the same thing?
f. I am in Customer Service and I want to have better rapport like other people do, I think it builds trust and gets better feedback scores, what can I do?

### *Digging Deeper*

When you hit on a point that strikes a chord, it's important to really understand the challenge, use some of the following techniques:

- Paraphrase three to five times using statements like:

  "So, have I heard correctly that you find ____"?

  "Have I got the most important parts if I describe the situation like this ____"?

- Ask clarifying questions when you're confused about the facts or to fill in blanks.
- Remember, avoid problem solving or coaching, just get clear about the situation.

### *Opening up for RQ Growth*

Try the following sequence with your coachee:

1. Remind ourselves what a 'Coach Profile' tends to focus on – People and Doing (to keep it simple).
4. Contrast it to your coachee's default approach.
5. Ask your coachee to think of a time when a stronger focus on people or detail than their natural approach was important (family, sport, work teams, product design etc)

## *Use the specific situation to unpack the differences*

Referring back to the situation of concern, ask your coachee to look at why the Coach profile has benefits in this situation, here are some examples matching to different Conversation Starters above to help frame the conversations:

| **Conversation starter** | **Coach reframing questions** |
|---|---|
| b) I need to engage people more effectively, I feel like I am the one left out all the time, how do I become more effective at sharing ideas and talking? | If you were going to contrast what you share and talk about, compared to how much and what other people share and talk about, what would you see as the differences? If you're uncomfortable sharing in the same ways, is there questions you can ask with genuine interest that are areas of interest for the coach (probably people or action oriented?) |
| c) I get great ideas to improve things at work, I work out all the details, but no one really seems interested, how do I get people more excited? | Getting people engaged with ideas is important to communicate in their style – it sounds like you have some Coach profiles you're wanting to get onboard, what type of presentation would suit them most? (details, facts, numbers, background research etc or big picture, next steps, outcomes and positive impacts on people?) |
| e) I am in sales, a few people I work with have a really good to the approach 'make a friend and let them buy from you' and sell more than I do, how can I do the same thing? | The Coach communication style is to share personal things and have a people and action orientation. It's important to stay genuine, however, if you want to engage more personally, what type of personal things can you feel comfortable sharing or asking about? |

## *Moving Forward:*

Now it's time for your coachee to begin to grow their RQ, there's many options to take here, which depend on the circumstances, in general they break down to three different approaches.

1. This month when the situation arises, I am going to shift gear into 'Coach Profile' and ______ (from the conversation starter scenarios):
2. and deliver my ideas in a way that will engage the Coach personality types, I know I have done the detailed planning, and the numbers, actually it will be useful for me to think in the way they want to hear, in reality my plan will be more

balanced if I have thought through their lens, so preparing to engage them will help give my thinking be more complete.

3. Open relationships with my customers/colleagues by remembering to ask _____ then share ______ , so I can have more human connection with my colleagues and customers.

### *Set a plan*

On _______ or when _______ happens I am going to _______ with a goal to _____

(Encourage reflection)

### *Set an expectation for review for reflection and growth*

"Next session let's discuss how it went, what we can learn, and what we'll add to be more effective stretching to Counsellor next time"

## Part 2B: Activities to develop specific Coaching competencies

Depending on where your coachee is at with their confidence in applying the models, you may want to help them develop their competencies by using the activities that follow. Two activities have been suggested for each competency. You and the coachee may decide to use either or both of these activities.

### ***Building rapport [competency]***

### ***Activity: Matching and mirroring***

*(Note: the concept for this activity is taken from PD Training's "Influence and Persuasion" course)*

One of the easiest ways to develop rapport is to mirror or match the other person's body language and non-verbal signals.

The next time you physically meet with your client, try the following exercise:

The exercise is in two parts. At the end of each part ask your client to answer the same two questions:

- *How would you rate the level of our interaction in the last 5 minutes?*
- *Was there anything specific about my behaviour that led to you give that rating?*

**Part 1**

- Let the client assume this is a normal coaching session and continue with your coaching plan and conversation with one essential difference…
- During the next five minutes make a conscious effort **not** to mirror the behaviour and body language of the client
    - If they lean forward then you lean back,
    - If they cross their arms, then you uncross yours and vice versa
    - If they put their hands behind their head, then you don't and vice versa
    - If they speak slowly, you speak faster and vice versa
- At the end of five minutes say to your client that you would like them to answer two simple questions. Then give the client the questions on a slip of paper.

**Part 2**

- Continue on as normal with your coaching session
- This time make a conscious effort to mirror your client's body language and behaviour
- At the end of five minutes ask your client to again answer the same two questions

**Debrief**

In most cases your client will notice a qualitative difference in the interaction but may not be able to explain why. You can then discuss what you did and the power of mirroring to build rapport with another. Then ask the client to what extent they are aware of the influence of such behaviour and whether they practice it.

## *Activity: Building rapport in conversation*

*(Note: the concept for this activity is taken from PD Training's "Influence and Persuasion" course)*

Building rapport in conversation, if practiced, can be as natural as conversing with an old friend. The key things to keep in mind:

- Be sincere
- Be present in the conversation
- Be confident
- Be empathic
- Be honest
- Create shared experiences

You can have your client practice building rapport (and provide feedback to her/him) by engaging in a role play.

Ask your client to describe a person at work who may be in their team, with whom they have difficulty conversing. Get them to describe the difficulty they have.

Now assume the role of this third person and ask the client to initiate a conversation. Remember to keep 'in role' and to get the client to explore different ways of initiating and engaging in conversation.

At the conclusion of the role play debrief the conversation reflecting on the actual person and brainstorm some practical strategies which the client may use to build rapport with this person. Some things to explore:

- How well the client listens
- Whether the client recognises the emotions in others and can tune into feelings and acknowledge them
- Whether the client uses praise and recognition for effort
- The degree to which the client asks open ended questions
- The degree to which the client knows what this person's interests are and attempts to engage in conversation around those interests

## *Easing tensions during conflict [competency]*

### *Activity: Resolving internal conflict*

*(Note: this activity is taken from PD Training's "Building High Performance Teams" course)*

Here is a list of strategies that team leaders can employ to resolve internal conflict:

**Remove all masks.**

Sincerity is the ideal mindset for conflict resolution. If we cannot achieve sincerity, at least aim for authenticity. Being authentic means not hiding behind masks but showing up as yourself.

**Identify the real problem.**

Often the real problem lurks somewhere behind or underneath the apparent problem. Conflict will not be resolved until the process can address the true problem.

**Give up a must-win attitude.**

When players compete too hard all the time, a good deal of life passes them by. They go to the wall to defend a position and will go down screaming, taking as many people with them as possible. Conflicts are not won; they are resolved.

**Develop several possible solutions.**

In reality, most situations can go in a variety of directions. It may be up to you to create the choices.

**Evaluate options and select a solution.**

Choose the best workable choice from the possibilities you have gathered. The goal is to choose the possibility that will hold the most for both you and the other party.

**Communicate in a manner certain to be received.**

A great idea goes nowhere if you don't communicate it to others. Only when someone feels you have heard their message, are they ready to listen to yours, so listen actively. Communication that is full of anger, lacks clarity, and has no commitment behind it, will not bring about action.

**Acknowledge and preserve the value in the relationship.**

Resolving conflict is about preserving relationships. If that were not so, people would not try to resolve their conflicts. Disputes would just fester and eventually destroy the relationship.

Ask the client to recall a recent event that caused friction or tension amongst the team.

What did the client do to resolve the tension (what did they say and do and how did the team respond?)

Now move through the strategies of the previous page and ask the client to reflect on the difference that may have been gained in using each of the strategies.

| | |
|---|---|
| Remove all masks | |
| Identify the real problem | |
| Give up must-win attitude | |
| Develop several possible solutions | |
| Evaluate options and select a solution | |
| Communicate in a manner certain to be received | |
| Acknowledge and preserve the value in the relationship | |

If there are strategies that the client believes would not work, then discuss the reasons for potential blockers to this and check the client's reasoning and see if there are ways of overcoming this.

## *Activity: Improving trust within the team*

*(Note: this activity is taken from PD Training's "Building Team Synergy" course)*

Trust is perhaps the most important factor in easing tension among team members.

This activity is in two parts. The first part asks the client to take a trust pulse of their team and rate the current level of trust against a suite of behaviours. The client then picks the three lowest rated behaviours and discusses with the coach what they could do to improve the situation.

+++++++

How would you rate (1 to 5) the current level of trust between you and your team? How do you currently demonstrate the behaviours listed?

| ***Behaviors*** | **How would I rate my capacity and how do I demonstrate this?** | **How would I rate the team's capacity and how do they demonstrate this?** |
|---|---|---|
| *To manage expectations* | | |
| *To establish boundaries* | | |
| *To delegate appropriately* | | |
| *To keep agreements* | | |
| *To be consistent* | | |
| *To acknowledge people's abilities and skills* | | |
| *To allow people to make decisions* | | |
| *To involve others and seek their input* | | |
| *To help people learn skills* | | |
| *To share information* | | |
| *To tell the truth* | | |
| *To admit mistakes* | | |
| *To give and receive constructive feedback* | | |
| *To maintain confidentiality* | | |
| *To speak with good purpose* | | |

Now pick the three behaviours with the lowest rating for you. Discuss with your coach what you could do to improve this.

| Behavior | What is hindering you? | What could you do differently? |
|---|---|---|
| | | |
| | | |
| | | |

### *Finding opportunities for synergy [competency]*

### *Activity: Knowing my team's strengths*

*(Note: this activity is taken from PD Training's "Building Team Synergy" course)*

Taking opportunities for team synergy comes firstly from understanding the make-up of your team and the uniqueness that each team member brings.

Consider your work team. Spend a few minutes considering the strengths of your teammates.

| Name (so that you can identify them) | What are their key strengths? | How are they currently using their strengths? | How could the team make better use of their strengths? |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

Did you discover that in some cases you are not fully aware of the strengths of your team? What can you do to uncover their strengths?

## *Activity: Sharing ownership to build synergy*

*(Note: this activity is taken from PD Training's "Improving Employee Accountability" course)*

Below are 10 ways that team leaders can create and share ownership among the team which in turn builds trust and respect for the uniqueness each member contributes.

1. Give employees the power to make decisions about how their job is done. When possible, give them say in the company's inner workings too.
2. Build rewards into the success of the company as well as individual departments. Make rewards based on results as well as actions.
3. Keep communication as open as possible. Share successes and failures.
4. Communication should be personal and intimate whenever possible – a meeting of 50 people with the CEO is far more effective than a newsletter or memo.
5. When you hand off a project, let go completely. Be supportive and offer advice and resources, but don't problem solve. One way to do this is to focus on the end results only, not the details.
6. Whenever possible, let people speak for themselves. If a report must be prepared or a presentation must be given, pass it off to the project owner.
7. Let employees know what the long-term plan is. Give them options for how they want to be involved through ventures like career and succession planning.
8. Encourage a holistic approach through the company. Focus on quality as well as quantity, customer satisfaction, and other emotion-based factors.
9. Invest in your employees. When possible, give them opportunities to learn and do new things. If possible, give them support to try new things – and don't say "I told you so" if it doesn't work.
10. Work on creating an atmosphere of cooperation and creativity rather than competition.

**What methods do you currently use to build ownership among your team?**

**What else can you do to build ownership among your team?**

**What can you do to instil in your team a desire that they seek out each other's strengths when collaborating on work tasks?**

### *Rallying others around a cause [competency]*

### *Activity: Using stories to persuade*

*(Note: this activity is taken from PD Training's "Influence and Persuasion" course)*

Stories can help make your point more memorable and easier to understand, and importantly, a good story can be very powerful in persuading people.

Some important points to note on stories:

**Stories have to make you stand out.**

Tell your story. You have to find something that helps you stand out from the crowd. If there is nothing that makes your story stand out from all the others, your results won't stand out either.

**Your story has to be believable.**

If your story is not authentic, you will not sound convincing.

**Storytelling works when it makes something more.**

If you believe storytelling, then you may believe that a different glass makes your wine taste better. Does food cooked in cookware endorsed by a famous chef taste better than that cooked in the same product without an endorsement? If you believe the story that comes with it, it sure does!

**Have a beginning, middle, and end.**

A story is not the same thing as a paragraph or an argument. A story is complete, with a beginning, middle, and an end. Using this format will help your story to be memorable and to carry your meaning.

**Be conscious of the audience's attention span.**

While we are wired to respond to and appreciate stories, we've also become accustomed to short messages on billboards and text messages. Remember your audience and think about capturing their attention without giving them license to be distracted as you deliver your message.

Now have your client construct a story on the next page.

Think of something that you want to convince your team of or something you want them to feel deeply. It could be related to the organization's vision, strategy, an event that has happened, the organization's purpose and how everyone can fulfil it, the team's recent performance, behaviour that you are calling out – it can be anything as long as it is meaningful.

Use the space below to plan what you want to say, listing down persuasive words or phrases that you want to include. What stories have you heard that can inspire your own story? What story will you tell to help influence your team's decision or influence their thinking?

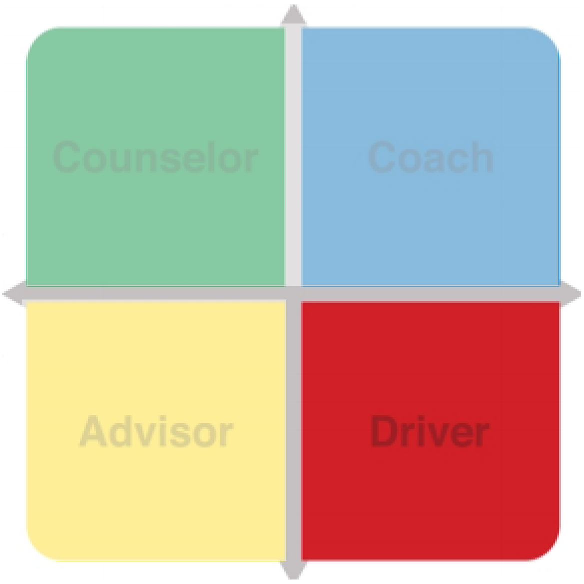
### *Activity: Applying the principles of influence*

*(Note: activity taken from PD Training's "Leadership and Influence" course)*

Discuss with your client Robert Cialdini's five universal principles of influence and how your client currently applies them and how else they might apply them.

| Principle | How I currently apply this principle | What else I could do to apply this principle |
|---|---|---|
| **Reciprocation: People are more willing to do something for you if you have already done something for them first. To put reciprocity into action, give people something for free.** | | |
| **Commitment: You cannot get people to commit to you or your vision if they don't see your commitment. Once you provide a solid, consistent example, they will feel they have to do the same.** | | |
| **Authority: If people believe you know what you are talking about and accept your expertise, they are far more likely to follow you.** | | |
| **Social Validation: As independent as we like to consider ourselves, we love to be part of a crowd. People will always jump on a bandwagon if their friends like the band.** | | |
| **Friendship: People listen to their friends. If they know you and like you, they are far more likely to support you. More than one leader has been abandoned at the first sign of trouble because they were not very well liked.** | | |

## Grow your client's ability to REACH into 'Driver'




### *Start the conversation:*

When you recognize someone could benefit from growing their RQ into Driver, listen for comments like the ones below or use these as conversation starters (ask something like "can you relate to comments like these?") if you sense there is something, and then dig deeper (see digging deeper).

### *Engaging with my Colleagues*

a. There are people who just don't seem to have time for anyone, they're focussed and don't listen to me, they always seem to be somewhere else in their head. I feel unimportant, then they just tell me what I need to have to do.
b. ______ is always having a chat, I get frustrated they aren't getting things done, I let them know how busy I am and just get on with it, I have seen them really upset afterwards and feel like I am damaging moral.

### *My ideas aren't heard, my plans aren't followed through, how do I get heard?*

c. I see how we can help people, and give ideas to the boss, they look at me like I am talking about things that aren't important and they just focus on their financial goals, how do I get them to realize people are important as well?
d. I do so much preparation to prove I have really thought things through, but when I go to present things, people kind of lose interest and seem to pay me lip service, where am I going wrong, do they all think I am stupid?

### *I want to engage my customers better – how do I grow my Driver?*

e. I am in sales, and I develop great relationships with my clients, I spend good quality time with each of them, my boss just keeps pushing me to make more and more calls, I believe in quality over quantity, what can I do?
f. I am in Customer Service and I have certain customers who call me and demand results and answers and solutions, yet I don't even know what the situation is; they're so rude!

### *Digging Deeper*

When you hit on a point that strikes a chord, it's important to really understand the challenge, use some of the following techniques:

- Paraphrase three to five times using statements like:

  "So, have I heard correctly that you find ____"?

  "Have a got the most important parts if I describe the situation like this ____"?

- Ask clarifying questions when you're confused about the facts or to fill in blanks.
- Remember, avoid problem solving or coaching, just get clear about the situation.

### *Opening up for RQ Growth*

Try the following sequence with your coachee.

1. Remind ourselves what a 'Driver Profile' tends to focus on – Outcomes and Tasks (to keep it simple).
2. Contrast it to your coachee's default approach.
3. Ask your coachee to think of a time when a stronger focus on people or detail than their natural approach was important (family, sport, work teams, product design etc)

### *Use the specific situation to unpack the differences*

Referring back to the situation of concern, ask your coachee to look at why the Advisor profile has benefits in this situation? Here are some examples matching to different Conversation Starters above to help frame the conversations:

| Conversation starter | Coach reframing questions |
| --- | --- |
| a) There are people who just don't seem to have time for anyone, they're focused and don't listen to me, they always seem to be somewhere else in their head. I feel unimportant, then they just tell me what I need to have to do. | The people you're observing are probably Drivers (Task and What's next focussed), you know that feeling you have sometimes, maybe it's when you are preparing to go on leave, or you have to leave early on a Friday afternoon, and you are madly rushing to get everything done before you go? So, you have to really knuckle down and make sure everything is finished…<br><br>Spare a thought for the drivers, that is how they feel pretty much all day every day – they feel rushed and racing against deadlines constantly. It's important to have these people on the team – they help get things done, just in their own way.<br><br>Is there a way you can frame their disinterest in your head to recognize what's in their head? |
| b) ______ is always having a chat, I get frustrated they aren't getting things done, I let them know how busy I am and just get on with it, I have seen them really upset afterwards and feel like I am damaging moral. | This sounds like the comment of a Driver, can they reflect on the different roles the people have – would they personally want to swap roles (if people are working to their strengths, it's likely they wouldn't enjoy swapping roles), and reflect on whether the chatter also gets their primary deliverables achieved?<br>This is a great opportunity to reflect on personality types of roles, and outcomes, is there an opportunity to be appreciative of the diversity of people and roles required?<br>Flipping it around, is this a good opportunity to help the Driver see an important function of what they need to deliver is recognizing the needs of people and catering to those needs. People matter, and the role they fill matters, how can the Driver add recognizing |

| | |
|---|---|
| | behaviours and appreciating that they go along with the type of role that person fills as one of their own deliverables and choose not to be frustrated? |
| e) I am in sales, and I develop great relationships with my clients, I spend good quality time with each of them, my boss just keeps pushing me to make more and more calls, I believe in quality over quantity, what can I do? | Balance and perspective are a beautiful thing. Is there an opportunity to step back and look objectively at the numbers of the sales pipeline/funnel and return per customer? This activity is best done with the boss as long as both parties can come at it with a desire to learn if there is a change in balance one way or the other.<br>Both perspectives (just like everything) are valid, this is an opportunity to grow and adapt based on the reality of this specific situation. “How I naturally do it” vs “how the situation needs me to be” is where the real growth an impact arises.<br>Most commonly in the scenario described, the most productive outcome will be somewhere between the team members approach and the bosses drive – but maybe not, this is a golden opportunity to grow RQ. |
| f) I am in Customer Service and I have certain customers who call me and demand results and answers and solutions, yet I don’t even know what the situation is; they’re so rude! | Your customer is probably a Driver – they feel like they are under pressure to achieve and drive results constantly. By the time they force themselves to stop and resolve something, they are already really personally challenged. This is the time their personality type is most on display in a raw form – they are just focussed on fixing the issue.<br>Is there an opportunity to recognize that their anger is at the product or situation, and to focus on helping resolve their anger? In this way you keep their anger and their frustration to be about them (it’s not about you personally) and switch to an outcome-oriented dialogue (this is what Drivers are all about) you can think and talk like a Driver – growing your RQ. |

## *Moving Forward:*

Now it's time for your coachee to begin to grow their RQ, there's many options to take here, which will depend on the circumstances, in general they break down to three different approaches:

1. This month when the situation arises, I am going to shift gear into 'Driver' or reach to connect with Driver Profiles and ______ (see below from the conversation starter scenarios):
2. Deliver my ideas in a way that will engage the Drivers by coming from a detailed approach, collaborate with the Drivers on my team early to get detailed thinking that doesn't come naturally to me, etc
3. Open relationships with my customers/colleagues by remembering to ask _____ then to share ______ so I can have more human connection with my colleagues and customers.

## *Set a plan*

On _______ or when _______ happens I am going to _______ with a goal to _____

Encourage reflection

## *Set an expectation for review for reflection and growth*

"Next session let's discuss how it went, what we can learn, and what we'll add to be more effective stretching to Driver next time"

## Part 2D: Activities to develop specific Driving competencies

Depending on where your coachee is at with their confidence in applying the models, you may want to help them develop their competencies by using the activities that follow. Two activities have been suggested for each competency. You and the coachee may decide to use either or both of these activities.

### *Establishing clear expectations [competency]*

### *Activity: How clear are you in defining requirements?*

*(Note: this activity is taken from PD Training's "Supervising Others" course)*

Ask the client to identify one of their direct reports. The client reflects on the person's role and/or tasks and using the 5W's and the H to ensure they have communicated the requirements of their role or task clearly.

**Role -** ______________________________

**1 W**

- **What are the key components of their role or task?**

**2 W**

- **What steps are involved?**

**3 W**

- **What should the end result look like?**

**H**

- **How does their role or this task tie into organizational goals?**

**4 W**

- **Who will the person need to talk to?**

**5 W**

- **When should the person check in?**

## *Activity: Set expectations with SMARTER goals*

*(Note: this activity is taken from PD Training's "Supervising Others" course)*

The client can set goals for themselves or guide their team in doing so using the following approach. Use this when establishing goals with your client.

| | |
|---|---|
| Specific | • the goal must be specific |
| Measurable | • You must be able to measure if the goal has been achieved |
| Achievable | • The goal needs to be within the scope of the person to achieve |
| Relevant | • The goal needs to be relevant to the work the person does |
| Time bound | • The goal needs to be achieved by a certain date |
| Evaluate | • The goal needs to be evaluated to ensure it is still on track to achieve and that nothing has changed |
| Readjust | • The goal may need to be readjusted if other parameters have changed |

### *Evaluating individual performance [competency]*

### *Activity: Giving feedback using the SBI model*

*(Note: this activity is taken from PD Training's "Leadership and Influence" course)*

A natural extension of evaluating the performance of a team member is providing feedback to her/him. Use the following tool to role play with your client in providing difficult feedback.

Delivering difficult feedback does not have to be hard if you stick to the facts, keep your emotion out of it and remember you are addressing a person's behaviour not them as a person.

**Situation -** Where or when

**Behaviour** – What I saw or heard

**Impact -** What this leads to, the result or the outcome

When delivering the feedback, deliver it from the 'I' perspective

| | |
|---|---|
| **When you…** | A statement that describes the behaviour without judgement, exaggeration, labelling or motives. Just state the facts as specifically as possible. |
| **I am concerned because…** | Say who or what it impacts and what the impact is. (Fellow colleagues, department, company, clients) |
| **Pause for discussion** | Let the other person respond. |
| **I would like…<br>Because…** | Describe the change to the other person to consider and why you think the change will address the issue/concern. |
| **What do you think?** | Listen to the other person's responses. Be prepared to discuss options. |

The order does not matter, if all the elements are there.

Now practice a situation with your client.

## *Activity: Pitfalls to avoid when evaluating performance*

*(Note: the concept of this activity is taken from PD Training's "Performance Management" course)*

With your client, reflect on the following issues that can occur when evaluating employee performance. Ask your client to consider what the implications are if these issues persist. Ask the client to propose how to avoid such issues and what may need to change in her/his current approach to evaluating performance.

- Waiting too long – performance issues not being addressed as they are noticed and being left till 'scheduled' performance appraisal meetings
- Rating inflation – the tendency for supervisors to give inflated rather than accurate performance appraisals because they fear the latter will damage their working relationship
- Prejudice or bias – supervisors who are unaware that they favourably or unfavourably bias individuals and may overlook weaknesses or exaggerate others
- Not focusing on the issue – where focus can deviate to the individual and not the issue
- Unrealistic goals or objectives – if the employee is incapable of achieving the required measure because it is unrealistic
- Inadequate observation – the evaluation is "guessed at'' as the supervisor has had inadequate time to observe behaviour
- Time interval for review is not adhered to – where issues from previous review periods are allowed to be part of the evaluation
- Lack of meaningful feedback – the supervisor gives either scant or opinionated feedback not based on facts and evidence
- Insufficient time to discuss – where the supervisor does not allow sufficient time to discuss the evaluation results
- Lack of follow through – where suggested corrective actions are not followed through by the Supervisor

### *Exercising control over team processes [competency]*

## *Activity: Keeping control of tasks and operations*

*(Note: this activity is taken from PD Training's "Highly Effective Management" course)*

There are four elements you can apply when implementing control:

1. **Standards**: Managers need to create plans and standards of measurement to gauge performance.
2. **Measure**: Once standards are established, measure performance regularly. Provide feedback.
3. **Compare**: Compare performance with the standards of measurement. Performance reports are an example of this comparison.
4. **Action**: Take action to correct mistakes and guide performance such as corrective action.

Have your client identify which type of control is needed in the following scenarios:

| | |
|---|---|
| 1. The budget for the next quarter needs to be written. | |
| 2. Team members are confused about their roles. | |
| 3. A member of management retires. | |
| 4. A new product is being introduced. | |
| 5. Employees want to organize a charity event. | |
| 6. The company needs to implement green ideas. | |
| 7. A new employee must be trained. | |
| 8. Production needs to be upgraded. | |
| 9. A new project is being created. | |
| 10. The product needs to be uniform. | |

Discuss with your client those areas of control that are unclear to her/him.

## *Activity: The balanced scorecard*

*(Note: this activity is taken from PD Training's "Business Process Management" course)*

A balanced scorecard is a performance measurement technique that focuses on joining an organization's strategies to specific measures. Its aim is to give feedback on how successful a strategy or process is performing. The balanced scorecard links the following performance measures:

- Financial: How is our financial health? How do our shareholders see us? How can we improve our bottom line?
- Customers: How do customers see us? Do we meet their expectations?
- Internal Business Processes: What do we need to do to succeed? Which processes have the greatest impact on our customers and our bottom line?
- Learning and Growth: How can we use learning to improve in the above three areas? How can we leverage learning to grow, create value, and improve?

**Benefits of the Balanced Scorecard**

*Creates Focus*

The balanced scorecard enables everyone within the Organization to be on the same page. By creating and documenting the issues that are important to the business, people can work collaboratively to figure out how they will achieve success.

*Integrates Four Key Aspects of Business*

The balanced scorecard allows businesses to see how the four key aspects of their company work together. Additionally, by breaking the organization down into manageable chunks, you can see where you are doing well and where you might need to focus your energy and resources.

*Allows Strategic Goals to be More Transparent*

When you are an employee working in a company, you hear the phrase "strategic goals" thrown around a lot. But you may still be wondering, "What are these mysterious goals? How do they impact me?" Having a balanced scorecard enables the strategic goals of the organization to be shared and understood by everyone.

+++++++

Work with your client to create a balanced scorecard using the questions below and the template on the next page.

- What is the overall mission of the business?
- What level of service is needed to attract and maintain customers?
- What processes need to be in place to ensure quality products and services?
- What training and support needs to be given to the team to optimize their performance?

**Scorecard Template**

| Financial Perspective | | Customer Perspective | |
|---|---|---|---|
| Actions | Measures | Actions | Measures |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

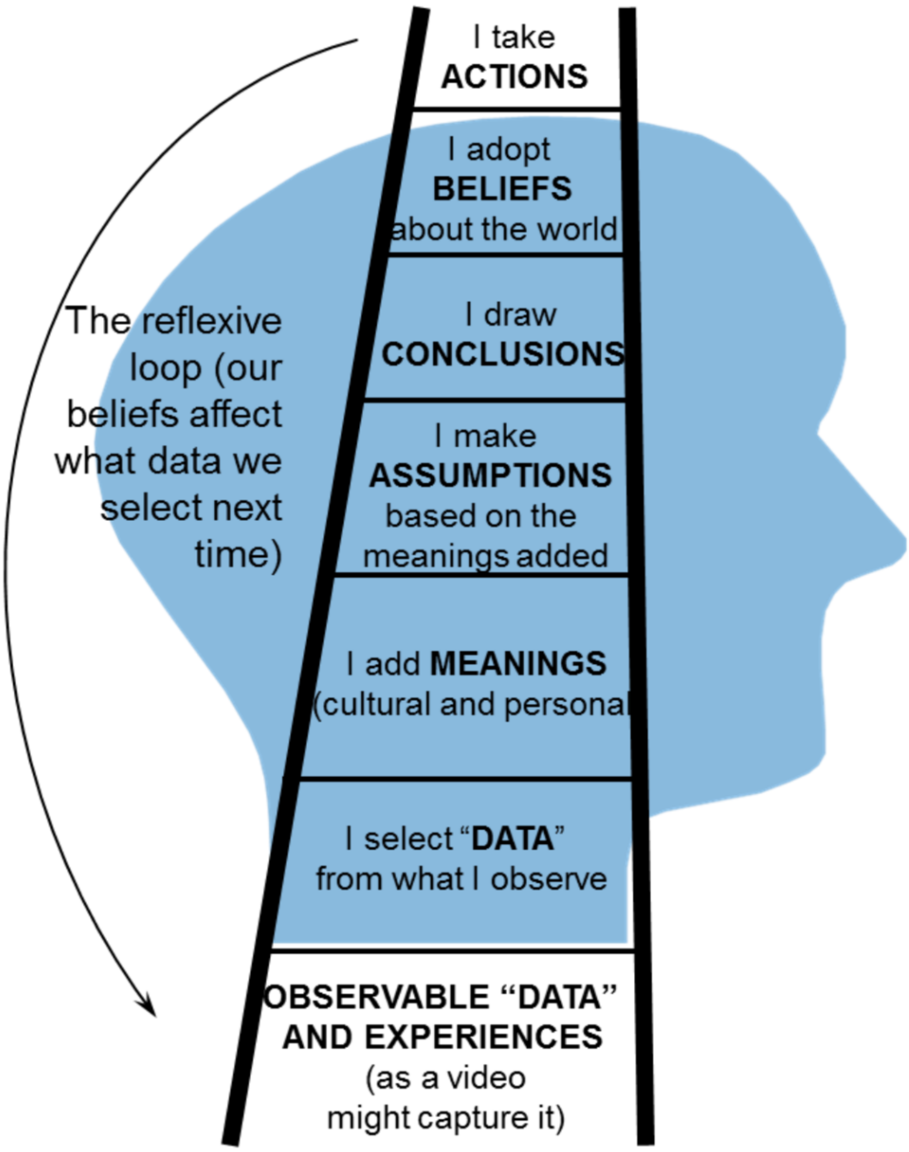
| Internal Business Perspective | | Learning and Growth Perspective | |
|---|---|---|---|
| Actions | Measures | Actions | Measures |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

### *Guiding team during change [competency]*

## *Activity: Problem solving and the ladder of inference*

*(Note: this activity is taken from PD Training's "Building Creativity and Problem Solving" course)*

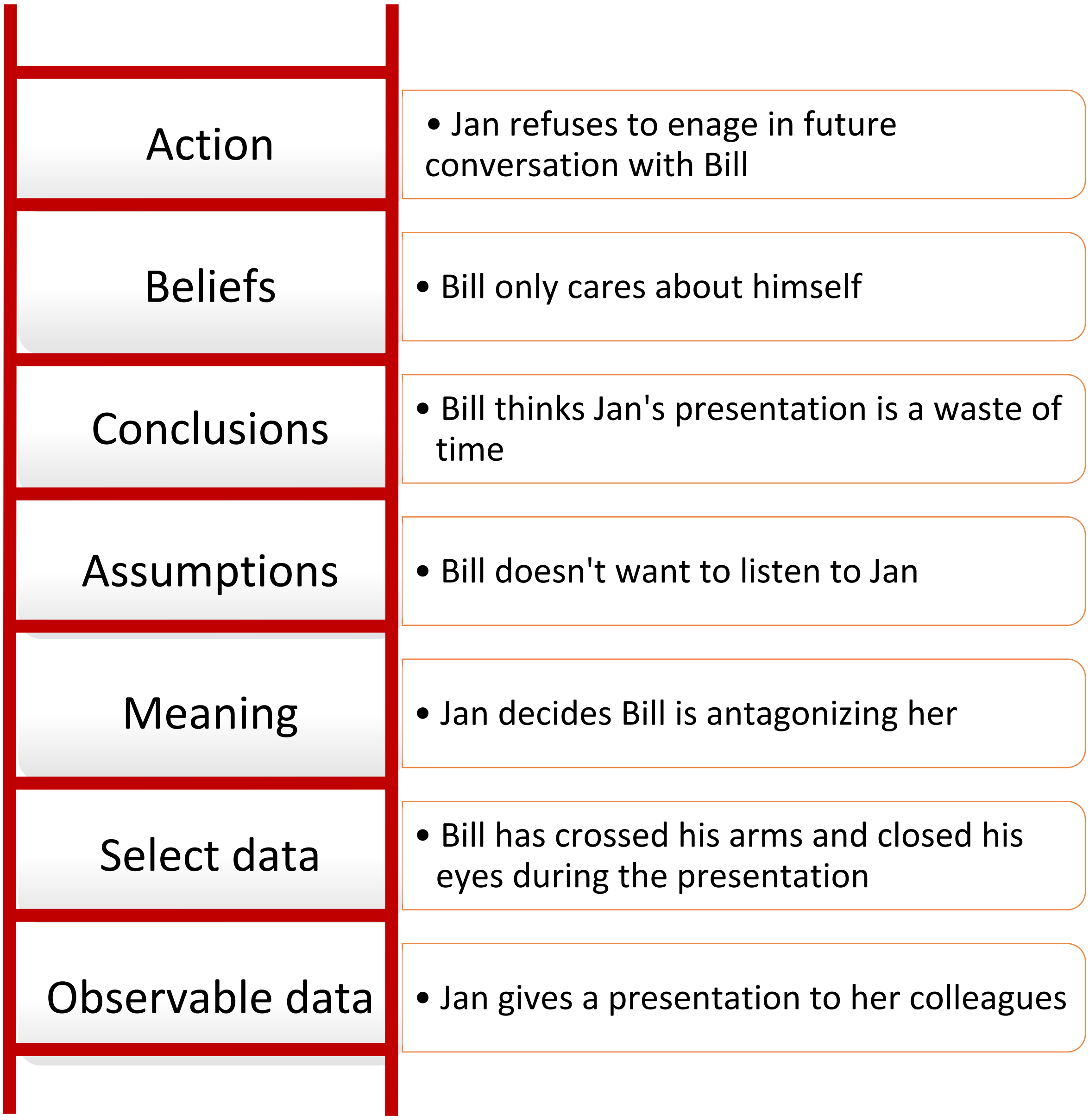
Psychologist Chris Argyris proposed the Ladder of Inference in 1992. It is a model that explains how the data we observe can lead to incorrect beliefs that can then shape our future thinking. We need to challenge the basis of our beliefs so that the actions we take as a result of those beliefs are based on well-reasoned and not faulty thinking.




This activity asks the client to apply the ladder of inference to a complex issue. The next page shows an example of the model is applied.

**Example**

Jan has given a presentation to a group of work colleagues and has observed Bill's behaviour. *Read from the bottom of the ladder.*




Possible explanations for Bill's behaviour:

- Listening intently, choosing to close his eyes to focus more on what Jan is saying
- Feeling ill, but still wanting to hear what Jan has to say
- Visualizing how Jan's idea might work
- Falling asleep
- Trying to calm himself down after an altercation, disagreement, or bad deal

How could Jan check her beliefs?

Now ask the client to apply the ladder of inference to a recent event involving themselves or a work colleague. In so doing they should check their reasoning at each rung on the ladder.

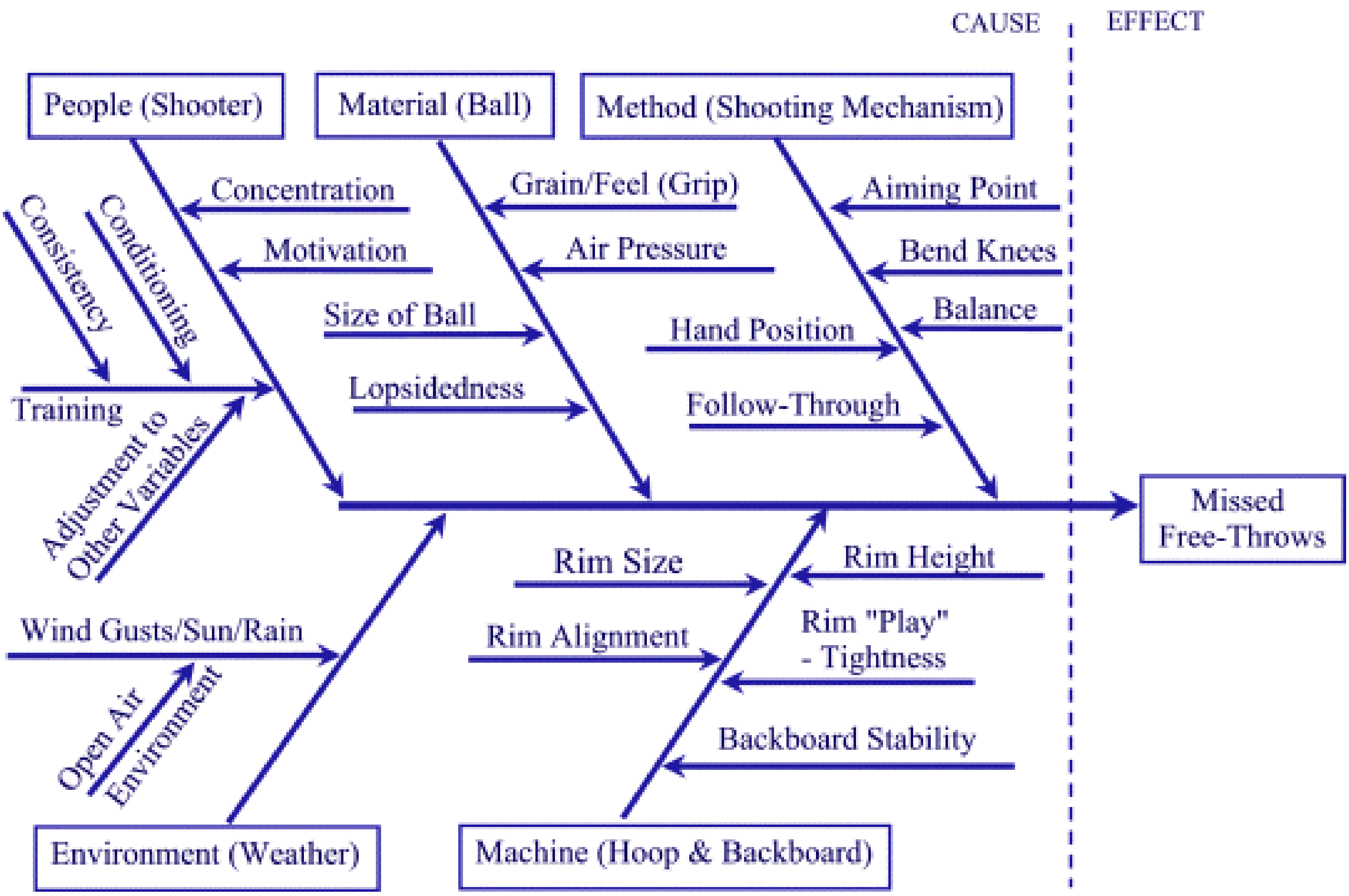
## *Activity: Cause and effect diagram*

*(Note: this activity is taken from PD Training's "Problem Solving and Decision Making" course)*

This tool, also called the Ishikawa diagram, after the Japanese quality management consultant who created, is an excellent method for solving complex problems, and for identifying the root cause(s) associated with it. It is most effective when used by a group.

The facilitator starts the discussion by drawing the outline of the diagram, and then asks for assistance from the group to identify the main causes. Each cause is listed separately (one per fishbone). The team continues making suggestions to fill out the entire diagram. Once the problem is laid out in this visual way, the team can decide what the root causes of the problem are. The causes are highlighted, and then can be acted upon.

One advantage of the fishbone diagram is that we can clearly see the reasons that a situation or problem exists, because we list all the factors that influence it. It is also possible to identify solutions that might help solve more than one problem, especially if you are applying it in a larger workplace where manufacturing, building, or other processes are taking place. This diagram can be used as a one-time exercise, or it can become a working document that is updated as various solutions are tried or more information becomes available.



Ask the client to state a problem (problem statement) that she/he would like to find the root cause for. This is written at the mouth of the "fish." Be as clear and specific as you can about the problem. Beware of defining the problem in terms of a solution (e.g., we need more of something).

Agree on the major categories of causes of the problem (written as branches from the main arrow). Major categories often include: equipment or supply factors, environmental factors, rules/policy/procedure factors, and people/staff factors.

Brainstorm all the possible causes of the problem. Ask "Why does this happen?" As each idea is given, the facilitator writes the causal factor as a branch from the appropriate category (places it on the fishbone diagram). Causes can be written in several places if they relate to several categories.

Again ask "Why does this happen?" about each cause. Write sub-causes branching off the cause branches.

Continue to ask "Why?" and generate deeper levels of causes and continue organizing them under related causes or categories. This will help you to identify and then address root causes to prevent future problems.

Invite the client to try this approach with their team.

# Module 8: Facilitating REACH

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH Communication Profile
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 8 is on:

- Developing your client's ability to facilitate REACH conversations with their colleagues
- Check in on goals identified in previous sessions and progress to date. Use the GROW model for each of them to develop steps for actions prior to the next session

### Part 1: Reviewing the Fundamentals of REACH RQ

By now your client will be familiar with the RQ and REACH frameworks and will be talking about different people by personality style (Coach, Driver, Advisor, Counsellor) and they will most likely be seeing the impacts of being aware of the different styles and approaches and recognize the stronger connections and positive impacts they have by being more mindful and adaptable (their RQ will be growing)

Some clients will be focussed on personal growth, some will be exclusively looking through a work lens.

Depending on their focus, they will be feeling by this stage that they usually are longing for the opportunity to have the same conversation using the same frameworks and awareness with people around them like they have with you.

It's great timing to offer a 60-90 minute session (at work or at home) on the fundamentals of REACH RQ.

To run one of these sessions successfully, each person involved will complete the REACH (once again, no additional cost to you as an RQ subscriber), then you can use the Team Awareness activity that's been built as a lunch 'n learn type session.

You have all the resources available to you, and this will help your client have more connected relationships with people in all areas of their life.

## Part 2: Guide to facilitating a REACH Session

Once the Client has revisited the fundamentals of REACH and RQ, they will be ready to attempt facilitating similar sessions with their colleagues. This section contains an outline of how the client might approach this. It is suggested that they facilitate a 1:1 session before attempting any group sessions.

The format for a 1:1 session is not dissimilar from the same pathway the client has taken during their own REACH development.

Some points to impress upon the client in their facilitator role:

- You are to facilitate understanding of the concepts of REACH and REACH through guided discussion
- A person's profile is determined by the interaction of their achieving and relating dimensions the degree to which is determined by a person's self-rating based on their survey responses
- Each of the four profiles offers its own key strengths, and no profile is better than the others
- While a person may be most comfortable acting within their own profile, they can learn to "stretch" to the other profiles over time through observing and practicing the markers provided in their report
- Honesty, transparency and confidentiality is best established through the client (as the facilitator) revealing their own report to the other person and discussing what this has meant for them in both understanding it and using the coaching insights to develop their REACH into other profiles

A suggested sequence of steps in a facilitated session is given on the next page.

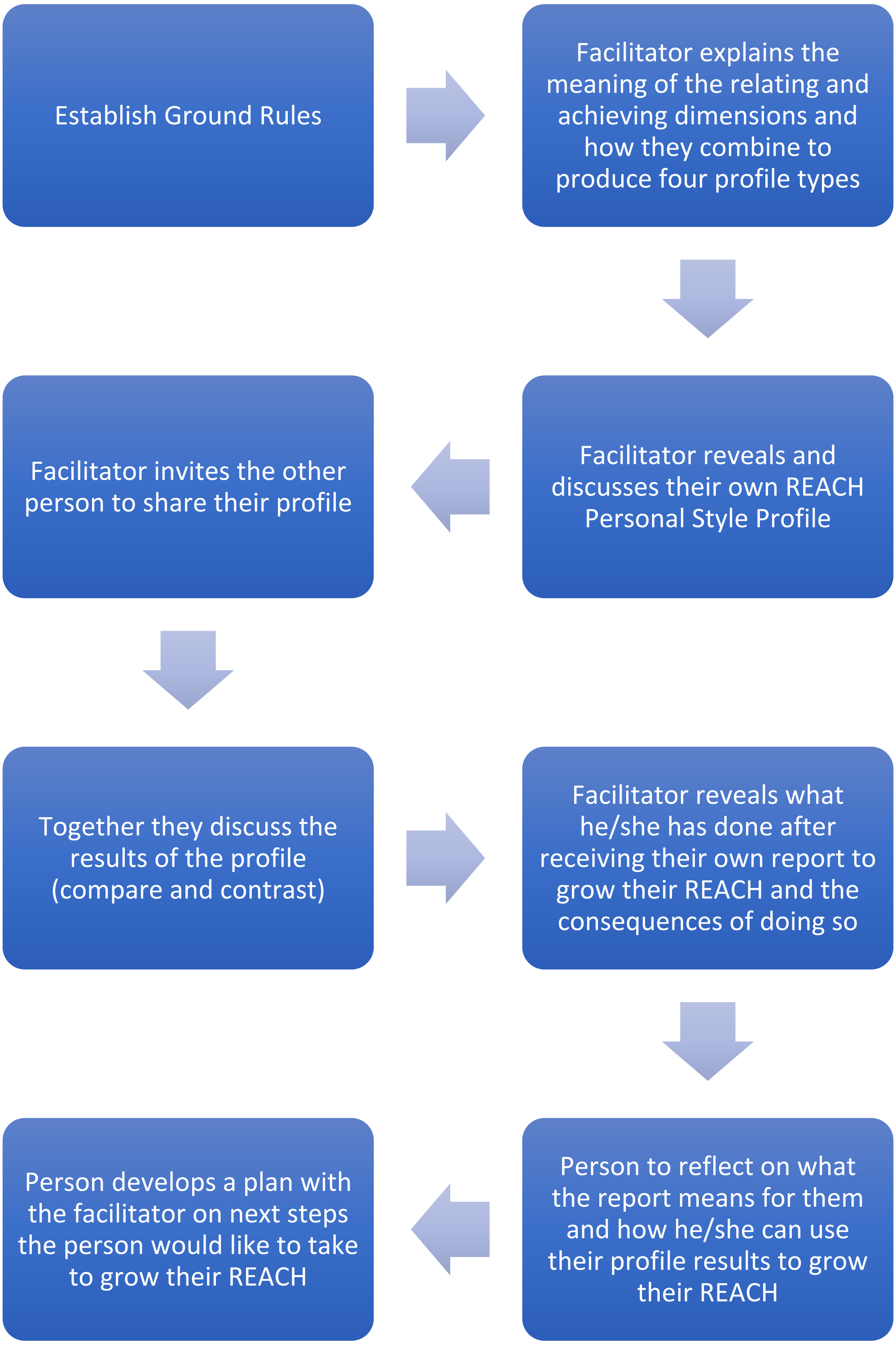
## Part 3: For the next meeting

Invite the client to facilitate a 1:1 REACH session with one of the colleagues.

Conclude by adopting the GROW process:

- What will be the Goal in planning a 1:1 session?
- Can the client identify any obstacles?
- What next steps can the client take to remove those obstacles?

Plan to debrief the client's facilitated session when you next meet.


Establish Ground Rules
Facilitator explains the meaning of the relating and achieving dimensions and how they combine to produce four profile types
Facilitator reveals and discusses their own REACH Personal Style Profile
Facilitator invites the other person to share their profile
Together they discuss the results of the profile (compare and contrast)
Facilitator reveals what he/she has done after receiving their own report to grow their REACH and the consequences of doing so
Person to reflect on what the report means for them and how he/she can use their profile results to grow their REACH
Person develops a plan with the facilitator on next steps the person would like to take to grow their REACH

# Module 9:  Creating a REACH Culture

## What you will need:

- A suitable, confidential environment
- A printed, colour copy of the client's REACH Culture Survey report
- Materials for note-taking and sharing the actions to be accomplished before next meeting

## Your focus:

Your focus in Module 9 is on:

- Developing an understanding of the REACH Culture Survey results
- Developing an understanding of the linkages between an individual's REACH and REACH360 and their contribution to and influence on the overall culture
- Developing action steps based on the findings in the culture survey
- Check in on goals identified in previous sessions and progress to date. Use the GROW model for each of them to develop steps for actions prior to the next session

### Part 1: Developing an understanding the REACH Culture Survey

When you have more senior clients, there are opportunities early in your relationship or later (like month 10 as suggested here) to introduce RQ Culture Surveys to the organization they work in. By introducing this tool, your client will see how the framework and mindset affects people right across the organization and will generally lead to a greater commitment to growing their RQ to maximize the positive impact on the organization more broadly.

As a coach, this will very likely expand coaching opportunities for you, as awareness about opportunities for improving leadership effectiveness across the organization will be delivered in a clear and simple report leveraging the same frameworks. If you introduce this a fair way through the relationship (such as in month 10), you will already be recognized by your client as having the skills and resources to help grow RQ, and will generally be offered additional coaching opportunities by your client.

Tip: 360's (mentioned earlier) can open the same opportunities for you.  Each leader in the business that completes a 360 will create coaching and training opportunities for you as you can help them increase their effectiveness. To maintain your position as a trusted coach and advisor that is genuinely helping, you'll often find it best to leave these relationship-expanding opportunities to later in the coaching relationship as suggested in this flow.

## *Purpose of the REACH Culture Survey*

The REACH Culture Survey report reveals the extent to which a REACH culture is promoted within the organization. Team members were asked to evaluate each cultural element by rating specific competencies that could be demonstrated by team leaders. Each competency was rated on a 5-point scale, with scores provided on the pages that follow. Additionally, team members were encouraged to provide optional comments to describe how they perceive leaders' effectiveness in promoting specific elements of a REACH culture.

Within the REACH framework, higher ratings are indicative of a workplace where team members are more fully engaged and better positioned to achieve higher performance outcomes. Where a particular cultural element is rated as less effective, leaders should be encouraged to initiate candid conversations regarding opportunities for improvement. Through ongoing training, development, and coaching, any organization can cultivate a REACH culture - while gaining the "productive people advantage" to thrive in today's workplace.

The second part of the survey asks respondents specific questions about how they view the work environment – how they describe its 'outlook' and the extent to which they have a genuine commitment to the organization through such constructs as:

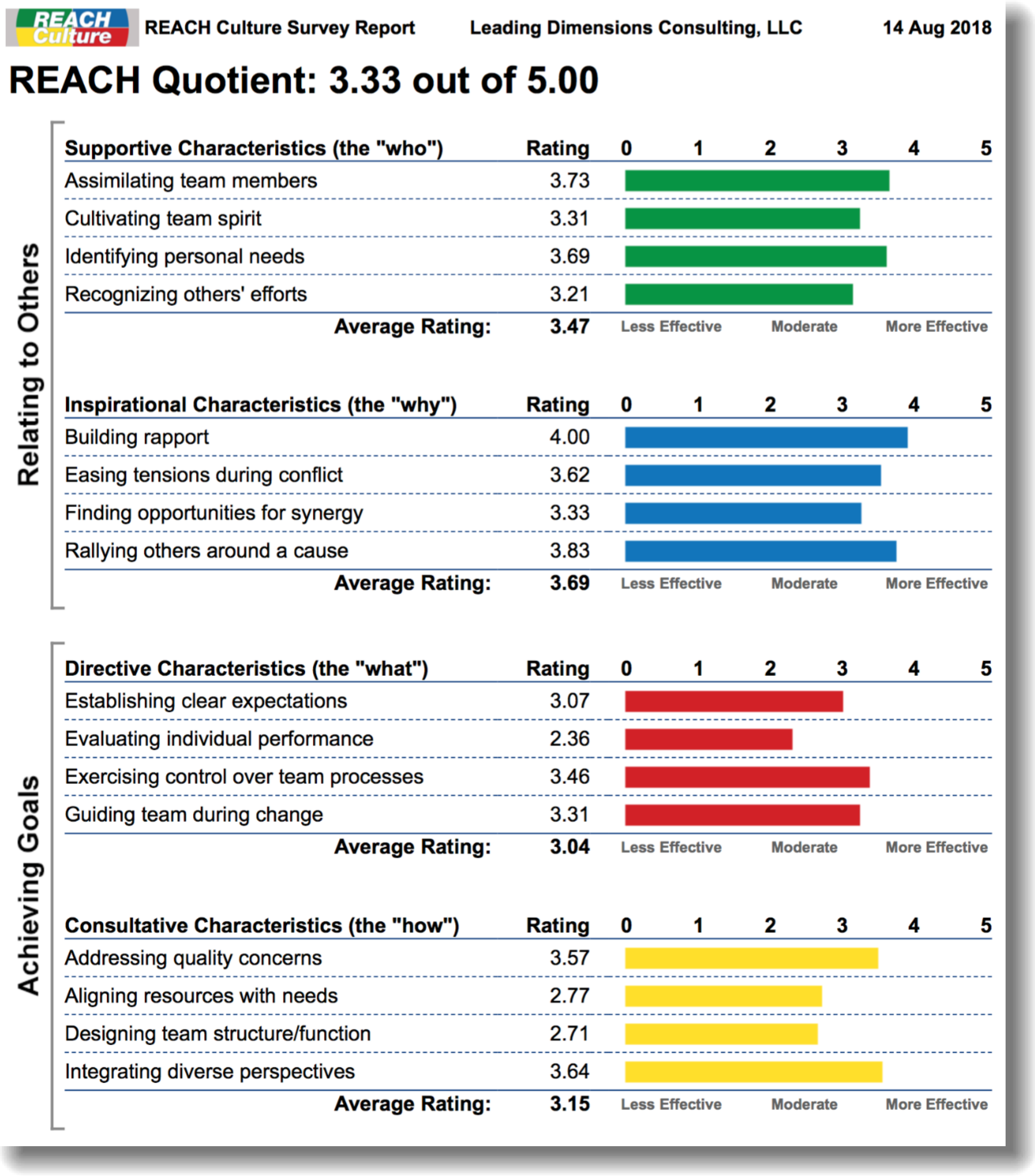
- Work enjoyment
- Respect for leadership
- That the work/team makes an impact
- Value offered by the organization
- A willingness to remain

## *REACH Quotient for the organization.*

This part of the survey measures the extent to which the leadership of the organization is:

- Supportive
- Inspirational
- Directive
- Consultative

The REACH Quotient is the average score across these four areas. The example below highlights the Directive area as being the one which is in most need of improvement.



REACH Culture Survey Report — Leading Dimensions Consulting, LLC — 14 Aug 2018

**REACH Quotient: 3.33 out of 5.00**

**Relating to Others**

| Supportive Characteristics (the "who") | Rating |
|---|---|
| Assimilating team members | 3.73 |
| Cultivating team spirit | 3.31 |
| Identifying personal needs | 3.69 |
| Recognizing others' efforts | 3.21 |
| **Average Rating:** | **3.47** |

| Inspirational Characteristics (the "why") | Rating |
|---|---|
| Building rapport | 4.00 |
| Easing tensions during conflict | 3.62 |
| Finding opportunities for synergy | 3.33 |
| Rallying others around a cause | 3.83 |
| **Average Rating:** | **3.69** |

**Achieving Goals**

| Directive Characteristics (the "what") | Rating |
|---|---|
| Establishing clear expectations | 3.07 |
| Evaluating individual performance | 2.36 |
| Exercising control over team processes | 3.46 |
| Guiding team during change | 3.31 |
| **Average Rating:** | **3.04** |

| Consultative Characteristics (the "how") | Rating |
|---|---|
| Addressing quality concerns | 3.57 |
| Aligning resources with needs | 2.77 |
| Designing team structure/function | 2.71 |
| Integrating diverse perspectives | 3.64 |
| **Average Rating:** | **3.15** |



The survey then looks at each competency cluster separately including the comments raters have made. The competencies in each cluster are the same as those in the individual REACH360 report.

### *'Outlook' Rating*

The Outlook rating provides additional information for the leadership on the extent to which employees will continue to turn up and commit their efforts to the organization.

## Outlook

**Focus: "How might most team members describe their outlook for the organization?"**

Participants were asked to select the response that best describes their perception of how team members view the work environment.

| Characteristic | Rating | Hi | Lo |
|---|---|---|---|
| Recommend this organization | **3.36** | 5 | 1 |
| Enjoy our work | **3.21** | 5 | 1 |
| Respect our team leaders | **3.14** | 5 | 1 |
| Team has a measurable impact | **3.54** | 5 | 2 |
| Organization offers value | **3.50** | 5 | 1 |
| We intend to remain here | **2.83** | 5 | 1 |
| **Average Rating:** | **3.26** | | |

Scale: 0 1 2 3 4 5 — Less Likely, Moderate, More Likely

In the example above the average rating for Outlook is 3.26 with the lowest scored characteristic being 'We intend to remain here' being an indication of future staff turnover.

## Part 2: Linking the REACH Culture Survey to the REACH360

A review of your client's REACH360 will show where they are contributing to the overall REACH culture of the organization as the example below demonstrates.

First consider the 'Directive' dimension of the organization:

REACH Culture Survey Report | Leading Dimensions Consulting, LLC | 14 Aug 2018

### REACHing with a Directive Culture

**Focus: "Are team members focused on meeting and exceeding expectations?"**

Participants were asked to evaluate the extent to which the organization provides a focused and directive environment. A directive culture is most recognized for driving team members to comply with expectations and meet timely performance goals. When the organization encourages this cultural characteristic effectively, its leaders focus on answering the "what" questions to ensure that team members are focused and accountable in pursuing desired outcomes.

Participants were asked to evaluate the extent to which the following characteristics, often associated with a directive team environment, are demonstrated within the organizational culture.

| Characteristic | Rating | Hi | Lo |
|---|---|---|---|
| Establishing clear expectations | 3.07 | 5 | 1 |
| Evaluating individual performance | 2.36 | 5 | 1 |
| Exercising control over team processes | 3.46 | 5 | 1 |
| Guiding team during change | 3.31 | 5 | 1 |
| **Average Rating:** | 3.04 | | |

Less Effective | Moderate | More Effective

Now consider the REACH360 of one of its leaders:

### Profile Comparison

| Styles | Combined Rating | | |
|---|---|---|---|
| Counseling Competencies | 2.21 | Self | 1.25 |
| | | Raters | 2.38 |
| Coaching Competencies | 2.93 | Self | 2.75 |
| | | Raters | 2.96 |
| Driving Competencies | 4.29 | Self | 5.00 |
| | | Raters | 4.17 |
| Advising Competencies | 3.11 | Self | 3.75 |
| | | Raters | 3.00 |

Even though in our example the Directive Characteristics of the organization scored lowest (3.04), our sample leader has a combined rating of 4.29 which means they are doing more than most leaders to contribute to a directive culture.

If we look at the counselling competencies of our sample leader, with a combined rating of 2.21, and compare that with the average rating for Supportive Characteristics of the Organization at 3.47, we notice a considerable gap.

This sort of comparison provides a conversation starter for yourself and the client:

- What are the areas for improvement that the Culture Survey highlights?
- How are you currently contributing to an optimal REACH culture for the organization?
- How will an improvement in your RQ impact the organization's REACH quotient?
- How can you assist other leader's in the organization to grow their RQ and through that the RQ of the organization?

## Part 3: Developing an Action Plan

Work with your client to identify which aspect of the REACH Culture Survey they would like to focus on and developing an action plan with them. Your client may decide to focus on the 'Outlook' characteristics. For example, if there was a concern about staff turnover, you could discuss how the client might be able to explore possible causes, explore the relationship with REACH and identify some steps they could take to improve staff turnover. The approach may be staged:

1. Investigate issue
2. Discuss strategies to resolve
3. Determine which strategies to pursue
4. Develop strategies into actions plans
5. Resource and Implement
6. Measure and Evaluate

Alternatively, the client may decide that the long-term goal when the REACH Culture Survey is next taken is to improve the organizational RQ score by "X" or to improve a particular characteristic.

A template for planning is included on the next page.

| Strategy:<br><br>Objective:<br><br>Completion date: | | | |
|---|---|---|---|
| Step | Resources Required | Personnel involved | Expected completion date |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

## Part 4: For the next meeting

Conclude by adopting the GROW process:

- What will be the goals in implementing the action plan?
- Can the client identify any obstacles?
- What next steps can the client take to remove those obstacles?

# Module 10: Multiplying REACH

At this milestone, it's great to review the progress, challenges and resources you have used together with your client through the year, and for you personally to reflect on your personal and professional growth through the journey.

Look over the suggested months here and see if there are opportunities to use some of the resources in this last month to continue the growth of your client and to further expand and deepen your opportunities to help them or their organization or family grow.

## *RQ Growth Progress Check-in*

Now is a great moment to check in on RQ Growth, ask your client to re-take their REACHRQ and have a chat around their RQ Growth, Self-awareness and future direction.

Some questions to explore:

- Where have they seen the most improvement in themselves since starting this coaching journey?
- What has changed in the nature of their relationships?
- What have been the most challenging aspects of personal growth?
- What wisdom have they received from others?
- What wisdom have they imparted to others?
- How have they seen their teams and their organization impacted by growing their REACH and through the organization as a whole improving its RQ?
- What are the next important growth steps they would like to take?
- How are they looking to positively impact the lives of others by coaching others in optimizing their RQ?

# Appendices

## Appendix A: GROW Model

**Background of the GROW Model**

GROW was influenced by the Inner Game method developed by Timothy Gallwey (Performance Consultants International nd). Gallwey was a tennis coach who noticed that he could often see what players were doing incorrectly, but that simply telling them what they should be doing did not bring about lasting change.

The parallel between Gallwey's Inner Game method and the GROW method can be illustrated by the example of players who do not keep their eyes on the ball. Some coaches might give instructions such as: "Keep your eye on the ball" to try to correct this. The problem with this sort of instruction is that a player will be able to follow it for a short while but may be unable to keep it in mind in the long term. So, one day, instead of giving an instruction, Gallwey asked players to say "bounce" out loud when the ball bounced and "hit" out loud when they hit the ball.

The result was that the players started to improve without a lot of effort because they were keeping their eyes on the ball. But because of the way the instruction was given they did not have a voice in their heads saying "I must keep my eye on the ball." Instead they were playing a simple game while they were playing tennis. Once Gallwey saw how play could be improved in this way, he stopped giving instructions and started asking questions that would help players discover for themselves what worked and what needed to change.

The GROW method is similar. For example, the first stage in the learning process would be to set a target which a player wants to achieve. If a player wanted to improve their first serve, Gallwey would ask how many first serves out of ten they would like to get in. This is the Goal. The Reality would be defined by asking the player to serve 10 balls and seeing how many first serves went in.

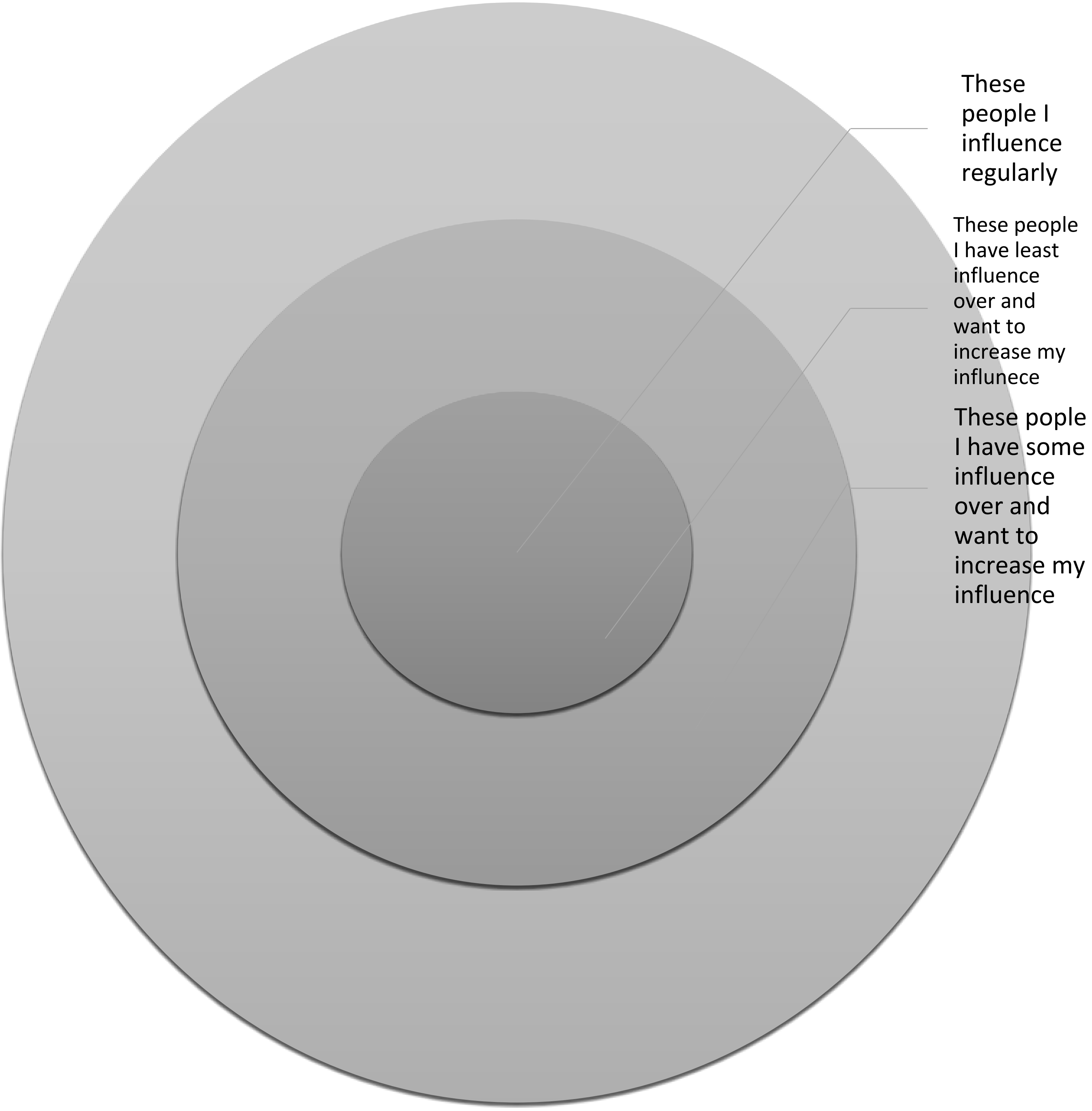
Gallwey would then ask awareness-raising questions such as "What do you notice you are doing differently when the ball goes in or out?" This question would enable players to discover for themselves what was changing about their mind and body when the serve went in or out. They had then defined their Obstacles and Options. They therefore learned for themselves what had to change in order to meet their serving targets and they had a clear Way Forward.

The originators of both the Inner Game method and the GROW method suggested that many individuals were struggling to achieve goals because they were not learning from experience and were not aware of the available knowledge that would help them.

Interestingly, this approach is consistent with Kolb's learning cycle – where each step of the process is vital, including reflection, and this active participation approach of doing vs being told what to do aids in the reflection step which is vital for growth.

| | | | |
|---|---|---|---|
| G | Goal | The Goal is the end point, where the client wants to be. The goal has to be defined in such a way that it is very clear to the client when they have achieved it. | • What do you want to achieve?<br>• What is important to you right now?<br>• What would you like to get from the next 30 minutes?<br>• What areas do you want to work on?<br>• Describe your perfect world<br>• What do you want to achieve as a result of this session?<br>• What will make you feel this time has been well spent? |
| R | Reality | The Current Reality is where the client is now. What are the issues, the challenges, how far are they away from their goal? | • Where are you now in relation to your goal?<br>• On a scale of 1-10 where are you?<br>• What has contributed to your success so far?<br>• What skills/knowledge/attributes do you have?<br>• What progress have you made so far?<br>• What is working well right now?<br>• What is required of you? |
| O | Obstacles | There will be Obstacles stopping the client getting from where they are now to where they want to go. If there were no Obstacles the client would already have reached their goal. | • What do you feel is holding you back?<br>• How long have these blockers been in place |
| | Options | Once Obstacles have been identified, the client needs to find ways of dealing with them if they are to make progress. These are the Options. | • What are your options?<br>• How have you tacked this/ a similar situation before?<br>• What could you do differently?<br>• Who do you know who has encountered a similar situation?<br>• Give me 5 options<br>• If anything was possible what would you do?<br>• What would your best friend /mother suggest?<br>• What else? |
| W | Way Forward | The Options then need to be converted into action steps which will take the client to their goal. These are the Way Forward. | • Which options work best for you?<br>• What one small step are you going to take now?<br>• What actions will you take?<br>• When are you going to start?<br>• Who will help you?<br>• How will you know you have been successful?<br>• How will you ensure that you do it?<br>• On a scale of 1 -10 how committed /motivated are you to doing it? |

## Appendix B: Sphere of Influence



## Appendix C: Character Strengths

Consider each strength in the table below and indicate if it is mostly like you, sometimes like you or nor often like you.

| Strength | Description | Mostly like me | Sometimes like me | Not often like me |
|---|---|---|---|---|
| **Creativity** | I like to think of new and better ways of doing things | | | |
| **Curiosity** | I am always asking questions and love to discover new things | | | |
| **Judgment** | I look at all sides of an issue to come up with the right answer | | | |
| **Love of learning** | I love to learn new things | | | |
| **Wisdom** | I am considered wise because I evaluate things from different perspectives | | | |
| **Bravery** | I speak up for what is right, even if others do not agree with me | | | |
| **Perseverance** | I finish what I start, even if it becomes difficult | | | |
| **Honesty** | I speak the truth and I take responsibility for my feelings and behaviors | | | |
| **Zest** | I live life as an adventure filled with excitement and energy | | | |
| **Love** | I value the close relationships I have with others | | | |
| **Kindness** | I enjoy helping others, even if I do not know them well | | | |
| **Social intelligence** | I pay attention to the motives and feelings of others | | | |
| **Teamwork** | I always do my share and I work hard for the success of my group | | | |
| **Fairness** | I treat all people in a fair and just manner | | | |
| **Leadership** | I am good at providing leadership and direction when I am with a group of people | | | |
| **Forgiveness** | I am willing to forgive someone who has done something wrong | | | |
| **Humility** | I am humble and let my actions speak more than my words | | | |

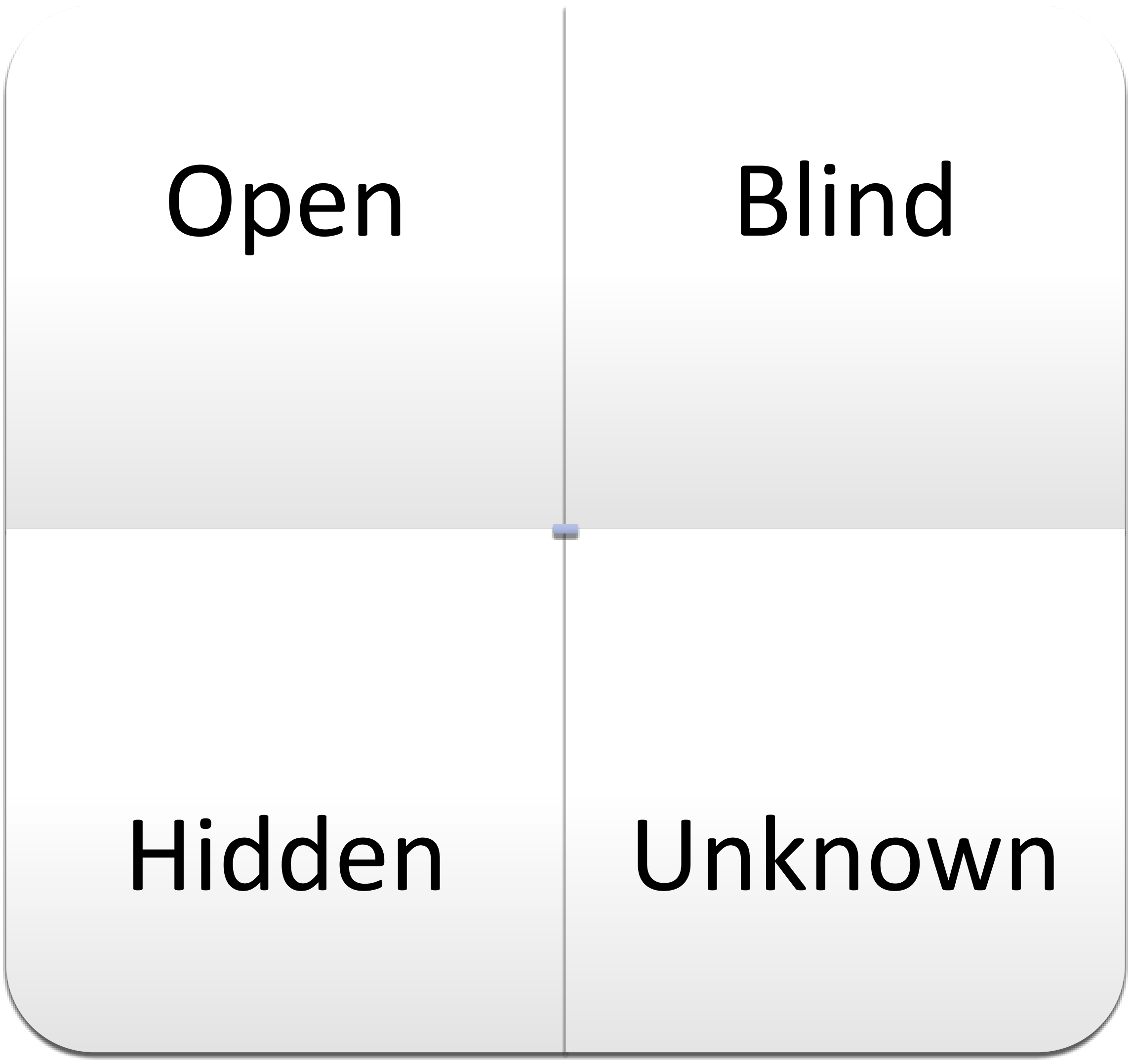
| | | | | |
|---|---|---|---|---|
| **Prudence** | I am careful about what I do and strive not to do things I might later regret | | | |
| **Self-control** | I pay attention and am always in control of what I do and say | | | |
| **Appreciation of beauty and excellence** | I appreciate the beautiful and wonderful things in life | | | |
| **Gratitude** | I pay attention to the good things that happen to me and express my thanks | | | |
| **Hope** | I believe that good things are coming to me now | | | |
| **Humor** | I like to laugh, smile, and see the good in all situations | | | |
| **Spirituality** | I have strong and coherent beliefs about the higher purpose and meaning of the universe. | | | |

**Determine:**

- What are your five most important strengths?
- What five strengths you would most like to develop?

(Adapted from embracecivility.org from material from the VIA Institute on Character http://www.viachachter.org)

## Appendix D: Johari Window template




**Word List:**

- violent
- insecure
- hostile
- needy
- ignorant
- blasé
- embarrassed
- insensitive
- dispassionate
- inattentive
- intolerant
- aloof
- irresponsible
- selfish
- unimaginative
- irrational
- imperceptive
- loud
- self-satisfied
- over dramatic
- unreliable
- inflexible
- glum
- vulgar
- unhappy
- inane
- distant
- chaotic
- vacuous
- passive
- dull
- timid
- unhelpful
- brash
- childish
- impatient
- panicky
- smug
- predictable
- foolish
- cowardly
- simple
- withdrawn
- cynical
- boastful
- weak
- unethical
- rash
- callous
- humourless

# References

Luft, J and Ingham, H 1955, ‘The Johari window, a graphic model of interpersonal awareness’, Proceedings of the western training laboratory in group development, University of California, Los Angeles.

Peterson, C and Seligman, M 2004, Character strengths and virtues: A handbook and classification, American Psychological Association, Washington, DC

Performance Consultants International nd, ‘The GROW Model’, < https://www.performanceconsultants.com/grow-model > viewed October 2018

**Recommended Readings**

Go Put Your Strengths to Work by Marcus Buckingham

The Winners Bible

5 Dysfunctions of a Team – Patrick Lencioni

5 Temptations of a CEO – Patrick Lencioni

7 Habits of Highly Effective People – Steven Covey

Mindset: The New Psychology of Success – Carol S Dweck