

Katie Leadership Coaching



*Katie School of Insurance
Illinois State University*

Why Coaching?

- ▶ **In knowledge-industry companies, the only sustainable competitive advantage is in developing “human capital”**
- ▶ **The failure rate among corporate executives in the past 10 years has been at least 50% (DeVries 1992)**
- ▶ **As a result, companies must get the best returns possible on their investment in leadership**
- ▶ **Traditional classroom leadership programs do not always change behaviors**

Why Katie School Leadership Coaching?

- ▶ **All Katie School coaches are “Business Leadership” coaches that understand business issues and strategies (in contrast to psychologist coaches)**
- ▶ **All Katie School coaches are certified in Character/Drivers/Rewards (CDR) assessments**
- ▶ **All Katie School coaches have support and access to Katie School resources to help with industry context**

CDR 3D Assessment Tool

▶ Inherent Leader Traits

- Character – Acumen, Inherent Differences, Fitness, Gifts & Gaps
- Risks – Problematic Behaviors, Derailment
- Drivers & Rewards – Accountability, Reinforcement, Fulfillment, Culture, Loyalty

Advantages of the CDR 3D Assessment Suite

- ▶ Available in five languages
- ▶ Based on science, statistical validity, and strict research standards
- ▶ EEO/ADA neutral—no adverse impact for minorities, females, or the disabled
- ▶ Diagnostic and Configural Capabilities

Companies use this tool for:

► Individuals

- Executive/Management performance improvement
- Career development and performance coaching
 - 3D-CDR tells “strengths and weaknesses”

Companies use this tool for:

▶ Teams

- Team selection
- Team building
- Interventions
- Training
- Aligning teams with strategic initiatives

Companies use this tool for:

► Organizational Issues

- Leadership and staff selection
 - Internal & external -- all positions & all levels.
- Re-staffing projects—mergers and acquisitions
- Identification of hidden talent and retraining
- Succession planning—building the “bench strength”

CDR Character Assessment

ADJUSTMENT

Self assured, steady under pressure, relaxed, - or -
Self-evaluative, edgy, intense performer, ...

SOCIABILITY

Extraverted, socially energized, - or -
Socially remote, reserved, an avid listener, ...

PRUDENCE

Dependable, self-controlled, conscientious, - or -
Risk taking, adaptable, not detailed, ...

LEARNING APPROACH

Academically inclined, achievement driven, - or -
Content learning with “hands on” approach, ...

LEADERSHIP ENERGY

Take charge, upward mobility driven, - or -
An individual contributor, modest ...

INTERPERSONAL SENSITIVITY

Warm, caring, sensitive to others' needs, - or -
Task focused, hard-nosed, direct, ...

INQUISITIVE

Adventurous, curious, imaginative, - or -
Practical, process focused, methodical, ...

Example: Leadership Character Assessment's Definitions & Performance Implications

Each Primary Character Scale is described to the "Subscale" level providing a very insightful or robust leadership development assessment report.

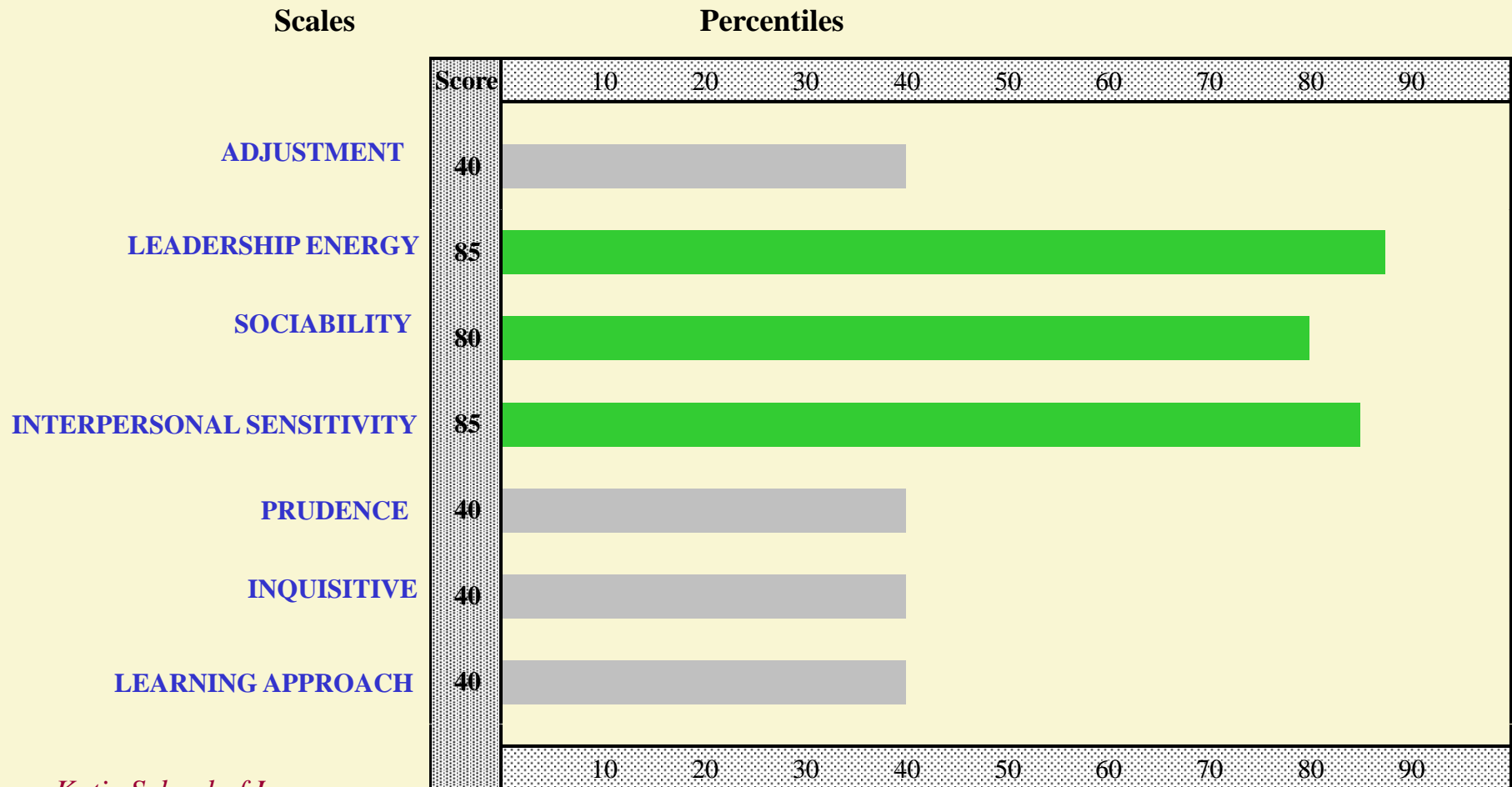
Adjustment – measures the extent to which a leader is calm, self-assured and steady under pressure versus being self-critical, edgy, and an intense performer.

CDR Subscale Titles for **Adjustment** include the following tendencies:

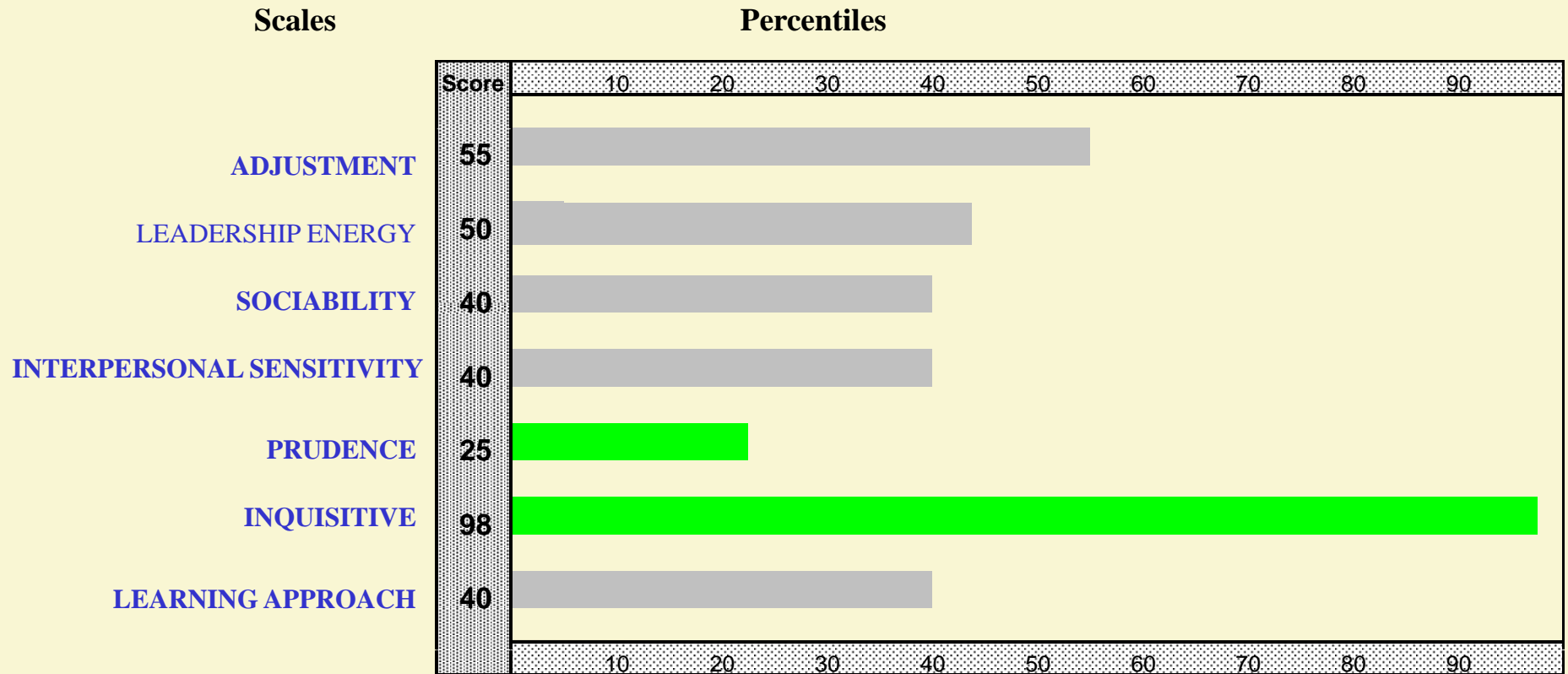
- ⇒ easygoing
- ⇒ not anxious
- ⇒ no regret
- ⇒ calmness
- ⇒ even tempered
- ⇒ stress stamina,
- ⇒ trusting, and
- ⇒ childhood authority relationships.

Character Assessment

Interpersonally Skilled Profile



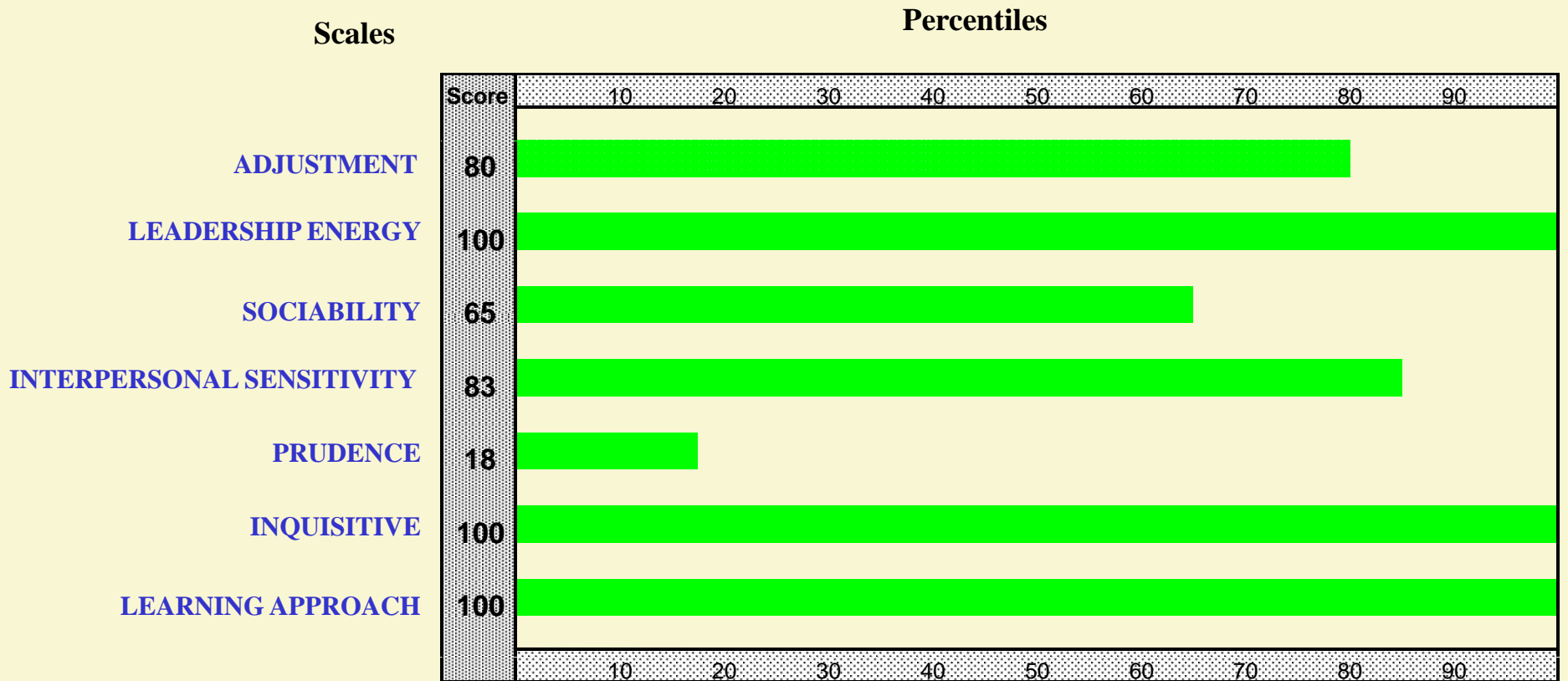
Character Assessment Creative Profile



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Character Assessment

Visionary Leader Profile



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Assessing An Individual's Drivers & Rewards

Revealing a person's

- lifestyle interests & fulfilling activities
- beliefs
- occupational preferences
- human interaction
“wants” *and*
- aversions.

And, measures needs:

- types of rewards & recognition desired
- optimal work environment & culture fit, and
- the types of work and tasks that are most enriching and valued.

Drivers & Rewards

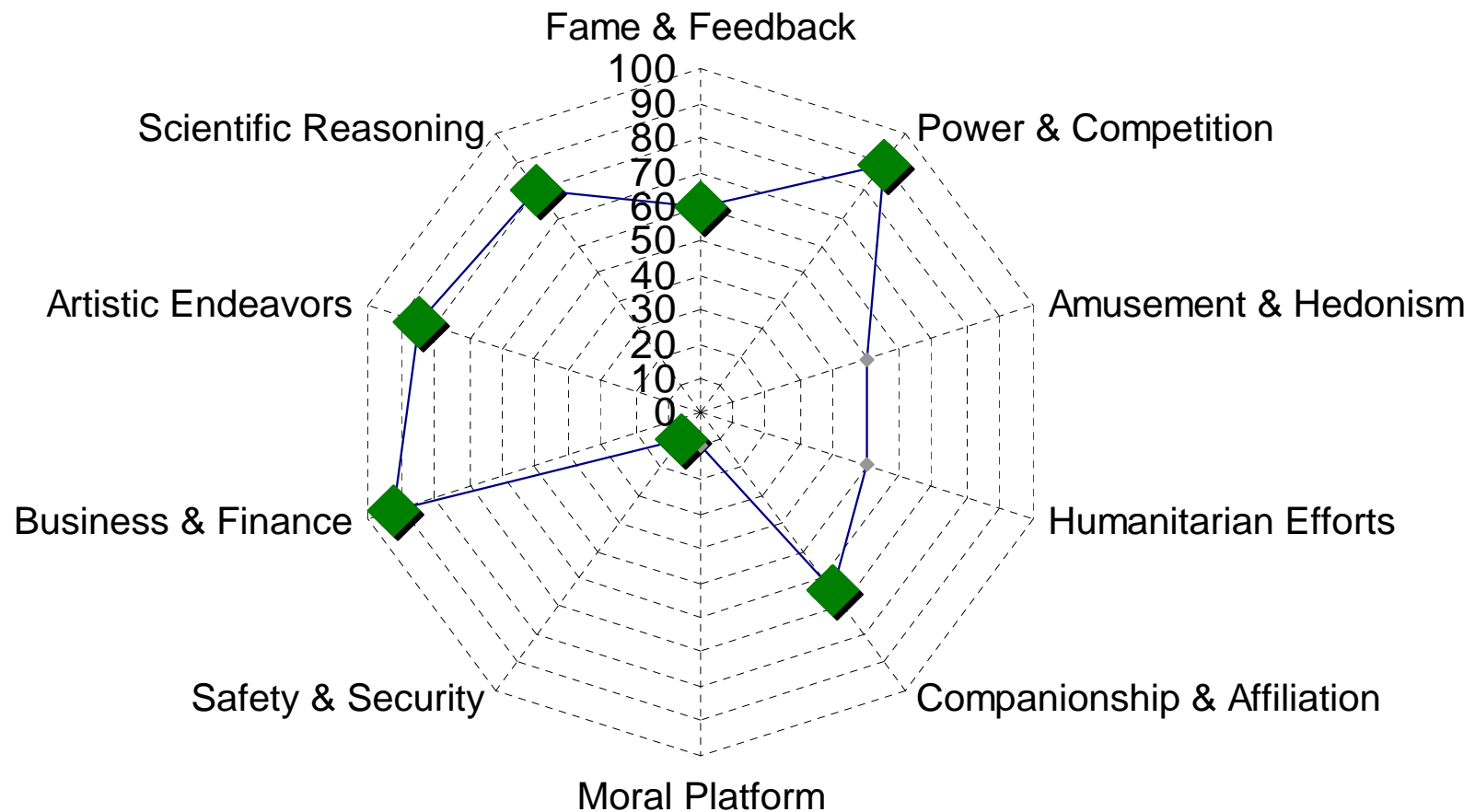
Facet Titles

- **Fame & Feedback**
- **Power & Competition**
- **Amusement &
Hedonism**
- **Humanitarian Efforts**
- **Companionship &
Affiliation**

- **Moral Platform**
- **Safety & Security**
- **Business & Finance**
- **Artistic Endeavors**
- **Scientific Reasoning**

Drivers & Rewards Assessment

Describe this Leader's Motivational Drivers



Executive Risks

(that undermine effectiveness & can result in derailment)

- False Advocate
- Worrier
- Cynic
- Rule Breaker
- Perfectionist
- Egotist
- Pleaser
- Hyper Moody
- Detached
- Upstager
- Eccentric

Risk Assessment Clusters – Traits that Commonly “*Hang Together*”

Hyper-Moody

Cynic

Worrier

Detached

False Advocate

Moving Away from People

withdrawing oneself from others to
achieve self-sufficiency and protection
from interpersonal confrontations

Egotist

Rule Breaker

Upstager

Eccentric

Moving Against People

using aggressiveness and hostility to
achieve power and personal admiration

Perfectionist

Pleaser

Moving Toward People

going along with people in order to
receive approval and affection

Ground Rules

▶ Coaches will:

- Hold personal results in confidence
- Hold our conversations in confidence
- Give feedback that is constructive and positive
- Give feedback with client best interests at heart

Ground Rules

▶ We ask our clients to

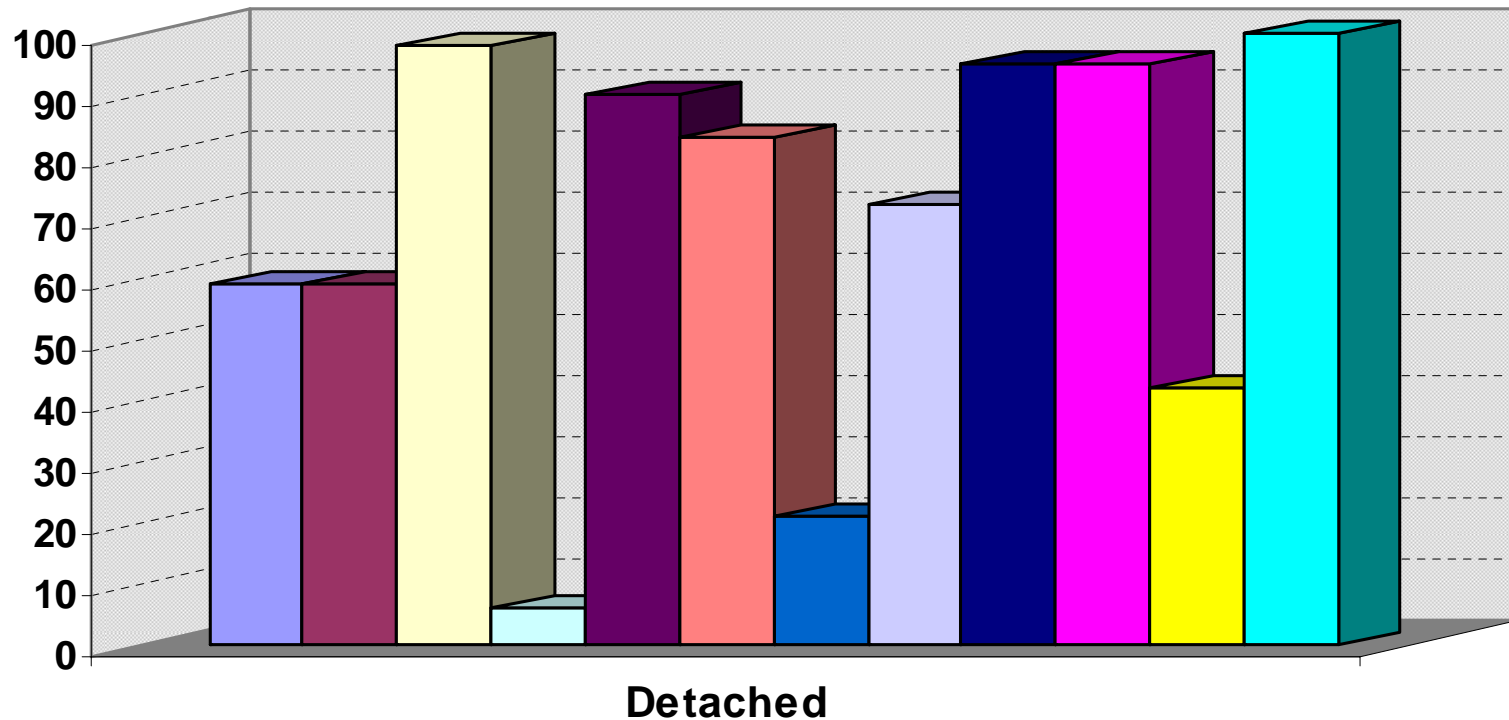
- Ask questions freely
- Challenge any results that don't make sense to you
- Share openly, knowing that our conversation is confidential and that candid discussions lead to better understanding of feedback
- Enjoy your results and use them as you go forward.

Team Coaching

- ▶ **Following individual assessments team coaching may be indicated:**
 - Identify issues of team as a whole
 - Explain how this will affect decision-making
 - Be customized to help deal with development issues of team to enable them perform at higher level. (See following examples)

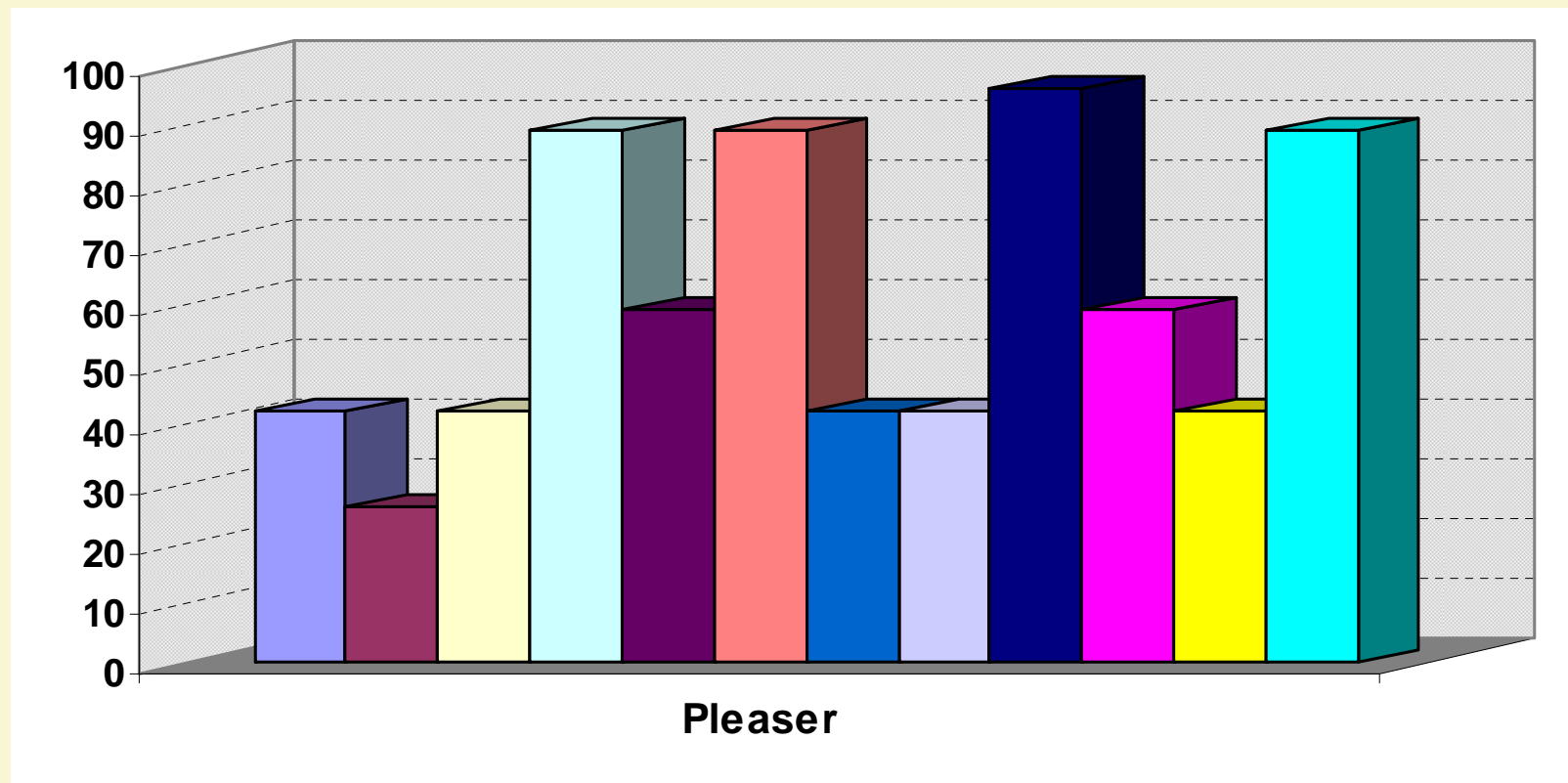
Use of Actual Team Results

This team results indicate that several 9 members take shelter and become invisible in times of stress and may avoid conflict. A workshop could be conducted to help with this.



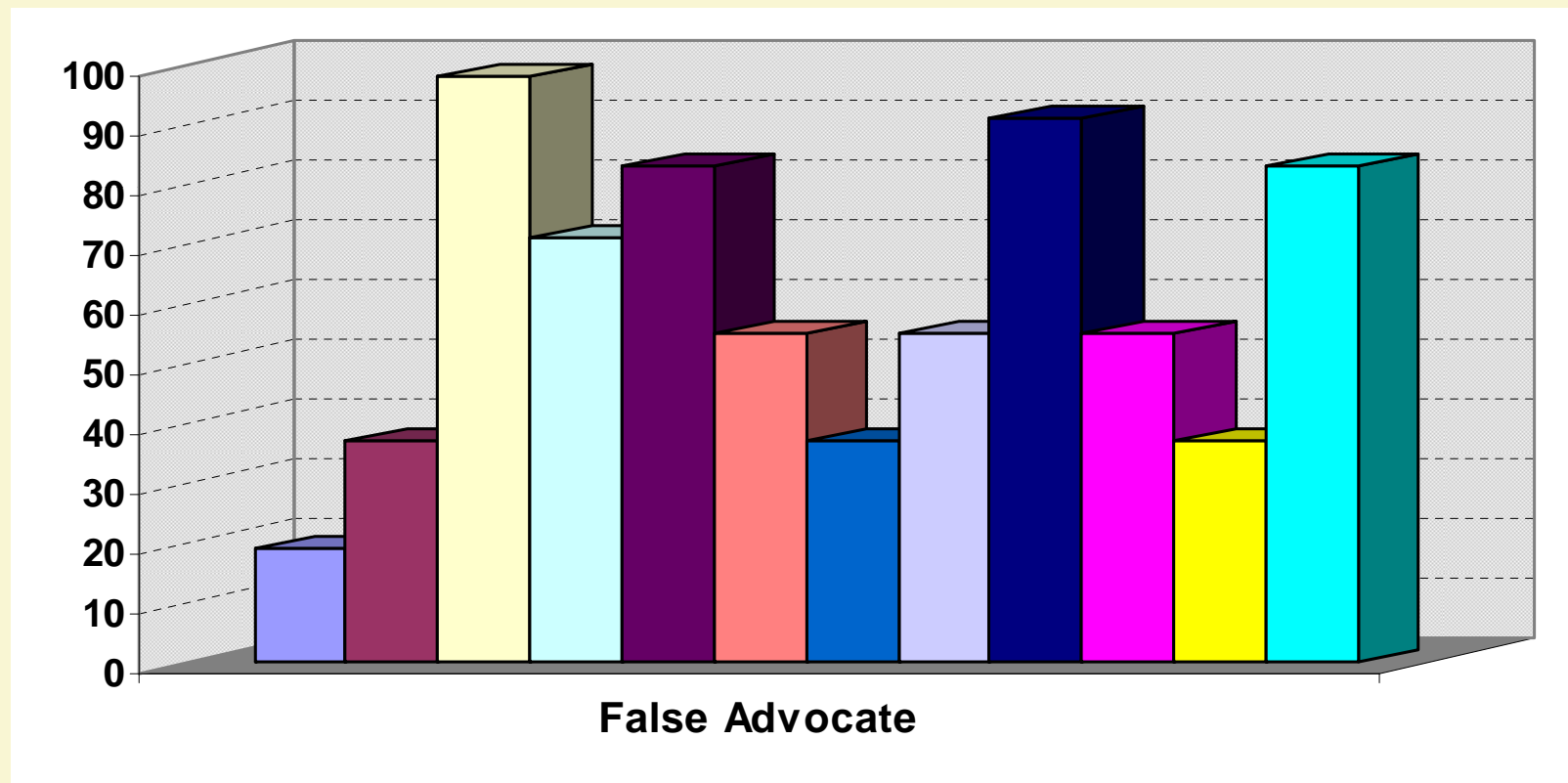
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This team results indicates high scores on “Pleaser” which may make movement on underperformance difficult and allow “conventional wisdom” to hold too much sway over decisions.



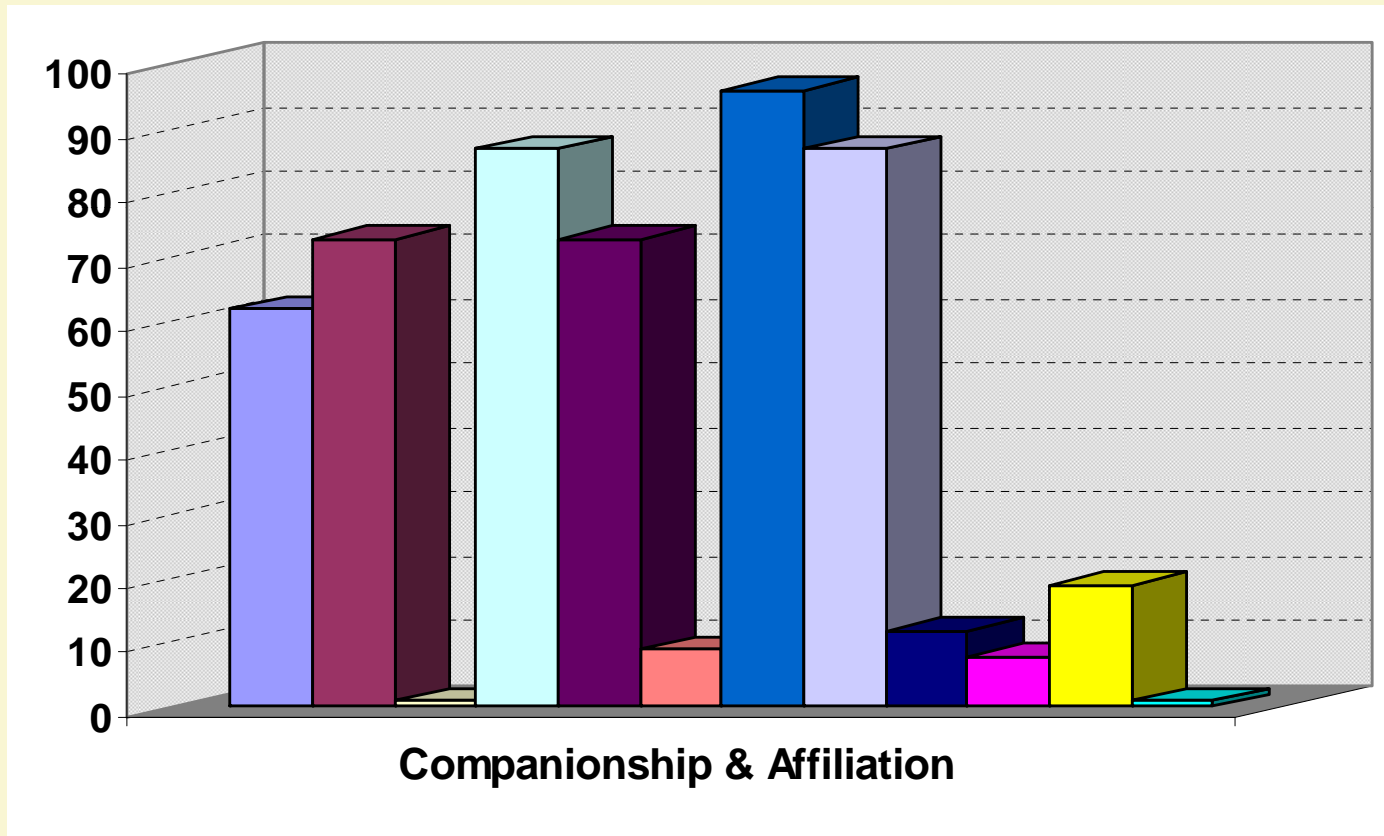
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This team result show high scores on “False Advocate” means that a lot of people are nodding “yes” to things they would really like to say “no” .



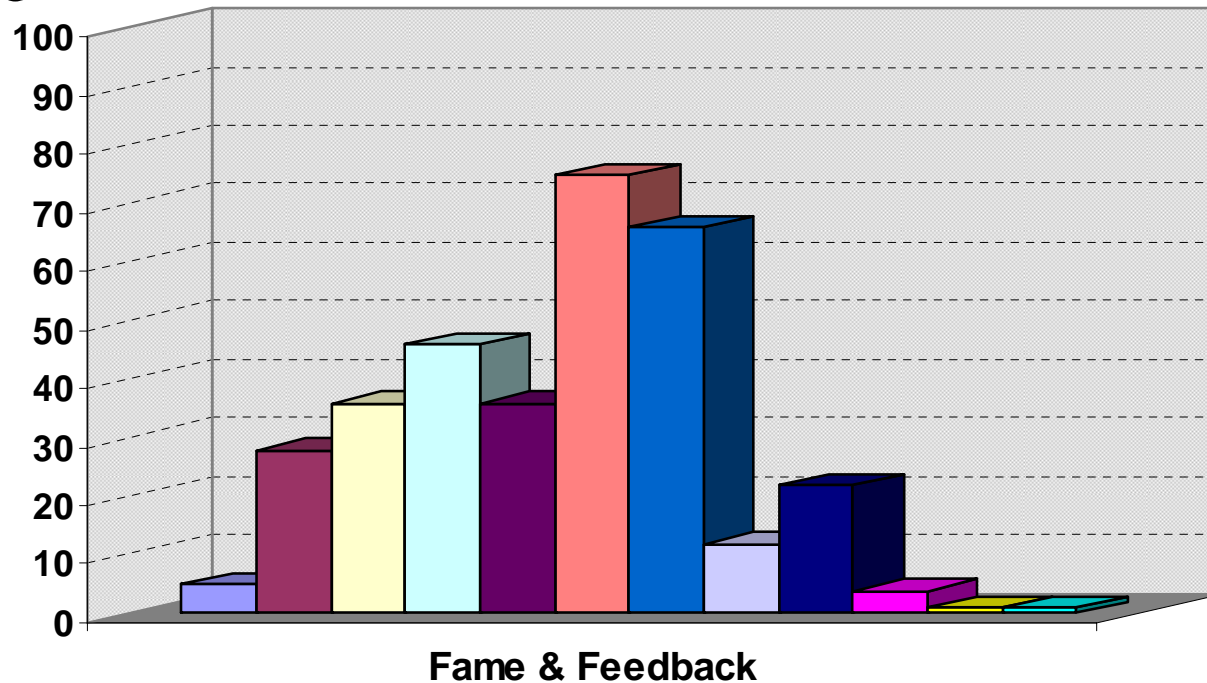
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This team has a bimodal distribution on Companionship as a driver: Very high for half the team yet nearly non-existent for other half.



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This a fairly low profile for management team for “fame and feedback” as a driver. It actually is an aversion for several members of this team. Consequently, many of the leaders are avoiding the spotlight. Need them to understand the impact of this on the organization.



What is the Resource Commitment?

▶ **The Individual Assessment and Coaching includes:**

- 3 assessments (character, risks, and drivers)
- In-person feedback and coaching based on assessments
- Individualized Leadership Development Plan
- Follow-up contact at 90 and 180 days

Questions

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