

## **Strategic and Behavioral Coaching**

The Bolton Group LLC is an executive assessment and development firm retained by CEOs, boards and senior executives who seek positive change in their leaders and top teams. We show individual executives how to operate at a higher level and create greater value, how to best align top leadership teams to perform and how to build the capabilities of the next generation of leaders.

We start the engagement by asking the following questions, the answers to which guide the coaching process:

- ***Where are you today?*** What's working and what could work better?
- ***Where do you want to be?*** What does success look like for you and your business?
- ***What must happen for success to occur?*** What new skills and behaviors need to be developed?
- ***How will you make the success occur?*** What is the game plan?
- ***What and whose assistance is required to make the success occur?*** Whose help and what resources are needed?

Once these questions are answered, we jointly create a customized development plan, which may focus on strategic coaching, behavioral coaching or a combination of both.

**Strategic coaching** can include:

- **Strategic Alignment and Planning Sessions** -- A session for the executive and top team to develop a unique, collective point-of-view on how they will position their business by focusing on the central ideas that meet customer demands and make money.
- **Executive value repositioning** -- Repositioning how the executive creates value after understanding the strategic imperatives to be achieved, reviewing how time is invested today, learning the executive's strengths and areas for improvement, becoming clear on satisfiers and dissatisfiers, determining how time needs to be spent going forward to meet the imperatives, resources required, skills to be learned, what to start/stop/continue, etc.
- **Preparation for next leadership role** -- Identify the skills and capabilities, time frames and characteristics and beliefs that are required for success at the next leadership level. Ensure the executive is appropriately "leading" up and empowering others to lead and manage at the appropriate level.

- **Executive visioning** -- Create a vision of what could be, along with a detailed plan, tools and know-how to achieve the vision.
- **Development of Leadership VOICE** -- Learn a framework to make explicit a “point-of-view” around leadership that is authentic, compelling and provides guidance. Define Personal Vision, Values, Guiding Ideas, Stories, and Teaching and Coaching opportunities. Develop the plan to share *Leadership VOICE* with others and teach others how to develop their own.

### **Examples of Strategic Coaching**

- Newly appointed General Manager, promoted from VP Sales role, needs to plan for his new opportunity. Needs to create a vision with the new team, learn to fully engage other functional areas and ensure he is leading “up” and not managing “down”.
- CEO’s business grows quickly and she is overwhelmed with keeping pace. With our help, she repositions how she adds value, making explicit decisions about what she will continue, start and stop doing, thereby creating clarity for others and space and capacity for her.
- New CEO develops his leadership VOICE and messaging for where he wishes to lead the organization. He creates clear direction for his followers, leading confidently and authentically.
- A Chief Medical Officer is hired by a medtech company from a teaching hospital. Combination of strategic and behavioral coaching to assist him in shifting from a clinical environment to the corporate world. He makes the transition, learning executive skills along the way, becoming a fully-contributing leader and member of the executive team.
- New CEO and top team seeks to create strategic alignment through a shared vision, mission and values and tighten company culture. Three year strategic plan created and set of goals for the top team and each team member. Clarity for all created by agreeing on roles/responsibilities and expectations.
- Assist CEO in mid-50s to build his “brand” and prepare for next career, following his retirement. Executive leads with his VOICE and is confident in both his current and future career plan.

### **Behavioral coaching includes:**

- **Receiving Feedback**
  - ***Gaining feedback on our self-awareness, social awareness and relationship skills, the leadership styles others see us use and the working climate we create.*** Participating in our ***Creating Executive Value*** assessment and

development process offers insight into how each executive operates as a leader of others. It's a holistic set of assessments that brings clarity to our behavioral strengths and development areas, and helps provide focus on what we must do to be our best as leaders. The assessments are state-of-the-art, on-line tools created and administered by HayGroup. These assessments include the ***Emotional Competence Inventory***, the ***Inventory of Leadership Styles*** and the ***Organizational Climate Survey***.

- ***More specific feedback from targeted interviews*** – Following or in place of the ***Creating Executive Value*** assessments, confidential customized interviews of “key stakeholders” e.g., direct manager, peers and direct reports, board members and other executives and key partners as appropriate to learn their perceptions of both strengths and areas of development, identify areas in need of attention, perception of leadership styles and working climate, etc.
- ***Creating a customized development plan***
  - Following feedback, identification of two to three specific development objectives for the coaching engagement – the “20 that gets the 80” – and a workable plan to achieve the objectives.
- ***Working the development plan***
  - Frequent meetings and calls with coach and executive to collaborate on plan, discuss alternatives, identify and resolve issues and keep up momentum.
  - Frequent interaction between coach and executive’s key stakeholders to gain observations and suggestions for on-going improvement.
  - Practice, repetition and adjustments as necessary
- ***Measuring Success***
  - Customized “mini-survey” at completion of coaching engagement to determine success in meeting the targeted development objectives from the standpoint of key stakeholders.

### ***Examples of Behavioral Coaching***

- CEO does not believe he is receiving candid feedback from his reports. Interviews conducted by coach and candid feedback provided. A development plan is created to address problematic behaviors, leveraging his strengths.
- Senior Vice President learns her directive and pacesetting styles are not having the desired impact with her mostly “Gen X” and “Millennial” group of direct reports. Following feedback and working with her coach, she learns to use the participative and coaching styles, be clear about her decision-making approach and creates a more positive working climate for all.

- Hard charging Divisional Vice President, Operations leads by pushing harder and faster. Career is stalled. After feedback and coaching, he learns how to moderate his style and to achieve results in a more sustainable way. He incorporates a more strategic vs. tactical approach. After successful completion of coaching engagement, he is promoted to SVP Operations for the corporation.
- Following his appointment to the SVP position of a WW business unit, executive forms a new team and needs to build a vision for the business. We assist in the vision-building process. He learns to use the visionary style of leadership and become more self-aware of his impact on others, especially those outside of the USA. As a result, after nine months of coaching his team of direct reports see a 63% improvement in how the executive and top team operates.
- New CEO wishes to gauge his reception and ensure he is receiving candid, honest feedback six months into his new global position. Interviews conducted and results shared. Development plan created with CEO to create clarity for others and address two cultural/behavioral concerns.
- A valued, long-term Vice President engages in unproductive behaviors periodically, particularly when under stress. He doesn't appreciate the damage his behavior causes others. Provided feedback from **CEV assessments** and interviews of key stakeholders. Assisted him to build self-awareness, self-control and a more positive working climate for others. Significant progress seen by all stakeholders. Executive "turned around" his performance and saved his career.

#### **Why does our executive coaching and development process work?**

1. We are clear about the purpose of the coaching engagement and we are focused in our pursuit of the targeted development objectives;
2. We incorporate both behavioral and strategic coaching to meet today's development and performance goals and prepare for the challenges of tomorrow;
3. We keep each executive motivated and on-track, making adjustments as required;
4. We teach the executive to ask for feedback and feedforward periodically and measure the progress the executive makes on the targeted development objectives from the standpoint of their key stakeholders;

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