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MANAGEMENT/EXECUTIVE DEVELOPMENT

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INTRODUCTION/OVERVIEW

The most effective approaches for helping managers and executives reach their potential and overcome obstacles in being highly effective are founded on gaining an in-depth understanding of the individual. Analogous to a physician not making treatment recommendations without a full diagnosis, we will rarely work with an individual who has not been through some form of assessment. We strongly recommend that an in-depth assessment be conducted that involves the standardized testing of abilities, personality, and work motivations, as well as an in-depth interview with an experienced doctorate-level assessor. In addition, perceptual data around key behaviors and competencies from the individual's supervisor, peers, and if appropriate, direct reports can also be most helpful in understanding an individual's behavior.

A good assessment process delves deeply into what motivates the individual and how he or she handles various aspects of their role, including leadership, interpersonal relationships, and work management. By focusing on the below-the-surface drivers and motivators, assessments will shed light on those aspects of behavior and motivation that will manifest themselves when a person is under stress and/or not "on their guard."

DEVELOPMENT TARGET CATEGORIES

While all individuals can benefit from development, we have found those in the following categories may find it the most helpful:

- **Early Career/High Potentials**

Individuals who are early on in their career and are believed to have potential to continue to grow and advance are typically very good candidates for developmental feedback and coaching. Helping these individuals fully understand their strengths, areas for continued development, and how to create and implement a development plan can be key to their long-term success. Focusing attention on these individuals has the added benefit of helping them reach their career goals within the organization versus looking at outside opportunities.

- **Mid- to Late-Career Executives**

Individuals who have “made their mark” over a significant period of time can also be excellent candidates for developmental feedback and coaching. The focus here, though, is on how to not only attain their remaining career goals, but also how to develop those individuals beneath them in the organization so as to leave the company in a good position once they would retire. Specific work with the individual and his or her team is often warranted in these situations. This stage of the career where knowledge is transferred from one generation to the next is often one of the most rewarding for an executive.

- **Under-Performing/At-Risk Employees***

When an individual’s performance and/or behavior puts their success or continued employment at risk, targeted coaching may be able to help them to “turn it around.” However, coaching and development efforts with these types of individuals are typically more focused and intense. In these situations, organizations need to be committed to helping the individual. It is suggested that employees who are receiving coaching be given a realistic opportunity to modify their behavior and improve their results prior to considering termination. These cases are ones where the focus is on helping the employee meet performance expectations and possibly retaining their position in the organization.

*A developmental feedback and coaching implementation should only be undertaken once it has been determined that the employee’s potential contributions are greater than the potential liabilities of their work and interpersonal styles. Decisions to separate an individual from the organization should be made prior to undertaking development and coaching if warranted. Those individuals separated from the organization should receive outplacement counseling following the separation.

DEVELOPMENTAL FEEDBACK AND PLANNING PROCESS

- **Step 1: In-Depth Individual Assessment and 360-Degree Feedback**

Prior to engaging in any developmental work, the participant should go through an in-depth assessment that will typically involve standardized testing, an in-depth interview with an experienced doctorate-level assessor, and if appropriate, narrative 360 degree feedback from his or her boss, peers, subordinates, and him or herself. While this assessment can be done remotely through the telephone and Internet, it may be more effective if done face-to-face, especially for at-risk employees. The assessment can usually be done in less than one day and the 360 degree feedback can usually be collected in less than two weeks.

- **Feedback to the Organization**

To fully understand the employee and his/her complete profile, management should receive an in-depth report concerning the target individual. This report should cover in a very direct fashion the person’s strengths, areas for improvement, and the potential for continued success within the organization. With more senior executives, this step is sometimes eliminated with all information going directly to the individual. The purpose of this report, however, is to give the organization a very clear idea of the person’s level of functioning and potential for growth, change, and development.

- **Step 2: Feedback to the Participant**

A report focusing on development is written specifically to the participant. This report covers the same general areas as the report to management but does so in a way that maintains the person's self-esteem and keeps their focus on improvement while maintaining their openness toward development. The report also includes information on how to create a development plan, as well as how to ensure its implementation given the other demands on the professional's time. Specific suggestions for development in areas identified by the assessment are provided and additional materials (e.g., *The Successful Manager's Handbook*) are often given to the participant during a face-to-face discussion. It is during this discussion with the assessor that the individual's openness to development, coaching, and personal improvement are discussed. Assuming a positive disposition toward development, additional coaching may be discussed at this point.

- **Step 3: Developmental Planning**

While developmental planning is discussed during the feedback with the participant, it is typically difficult for the individual to process the information and begin significant work on addressing developmental areas. The focus of this follow-up discussion is on how to define goals, leverage strengths, and address developmental areas in a planful and well-organized way. The participant will integrate all of the feedback and, with the assessor's help, construct a development plan that will then be presented to his or her supervisor and, ideally, be incorporated into the organization's performance management system. If appropriate, the assessor may facilitate a discussion with the participant and his supervisor. This may be especially helpful in cases of at-risk employees, as it will be important in all cases to define what behavior change needs to occur and, at the very least, what will define success of the development process.

- **Step 4: On-Going Management Development (Optional)**

The primary role of the assessor is to help the participants understand their developmental priorities, structure their development plan, and help hold them accountable to it. Typically, the organization will engage an internal or external coach to support the individual in carrying out the developmental plan. PCI assessors work with the coach to provide insights into the individual's motivations and developmental needs and provide on-going assistance.

- **Step 5: Team Development Activities**

As is often part of the process with managers, it is important to address their ability to delegate to their staff and to foster development and teamwork. Successful programs are flexible and targeted and often will include in-depth or abbreviated assessments and/or 360 processes with the participant's work team as well as off-site facilitated developmental sessions to focus on team developmental planning and implementation. This is seen as a key step in situations where the executive's focus is on succession planning and development.

OVERALL SUMMARY

The above process is a rather brief and abbreviated description of a general approach to development. As these interventions tend to be very in-depth, personal, and focused, it is essential that there is a high level of trust between all parties concerned. Therefore, should you feel that you or someone in your organization would benefit from developmental assessment or coaching, the best thing to do is to schedule a meeting with qualified and experienced assessment and development professionals to discuss your particular situation and how it might be best addressed. By focusing on continuing to build the skills and competencies of your key staff, as well as prevent the derailment of otherwise strong employees, you will certainly position yourself well for continued success in relation to your competition.