



LearnShare Webinar

**Ensuring High Potential personnel are
Ready for Key Positions:**

**Integrating Professional Coaching into the
Succession Planning Process**

Presenter

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President, CEO

The Flourishing Company



James E. Seaman
Director
Member Communities



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Heather L. Bradley
President & CEO
The Flourishing Company



Heather is a strategic, visionary leader. Formerly a Fortune 500 Vice-President, Human Resources in a manufacturing company, Heather rose quickly during her 15 years as an internal HR professional due to her ability to align with business partners, her process focus, consistent delivery of results and expertise in change management. Heather is a certified and credentialed coach and among the first 25 coaches in the world to be awarded the ORSCC designation. As a published author, Heather is credited with co-authoring two books, dozens of articles and a collection of on-line courses.

Heather has served on the faculty of the U.S. Treasury Executive Institute, the Minority Corporate Counsel Association's Pathways to Diversity Conference, ACC's Corporate Counsel University, featured in Human Resources Executive Magazine and in The Washington Post.

*Ensuring High Potential Personnel
are Ready for Key Positions:*

*Integrating Professional Coaching
into the Succession Planning Process*



*Webinar
November 18, 2010*

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Growing People - Driving Results

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An effective coaching strategy
will accelerate the
development and readiness
of your High Potential personnel



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Our objectives today...

- ✓ Discuss the concepts of succession planning
 - ✓ Typical key elements
- ✓ Understand how professional coaching can become an integral part of succession planning process
 - ✓ Coaching vs. mentoring vs. managing
 - ✓ Different coaching foci – when to use each
 - ✓ Measuring effectiveness



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The value of succession planning

Using your vision for the organization to create a plan to ensure –

- ✓ right people
 - ✓ in the right place
 - ✓ at the right time
 - ✓ with the right skills/competencies



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The value of succession planning

Alignment

- future needs of the company
- availability of appropriate resources

Retention

- Continual supply of key personnel
- Defined career paths



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The need for succession planning

*Perhaps the most striking finding in the August survey is that **nearly half (49%) of all surveyed employees are considering leaving their jobs** and just 45% expect to stay with their current employers (Figure 1). In fact, **30% are already actively seeking new employers**—a figure that could rise as more employees venture into the job market once the recession ends.*

Deloitte
Managing talent in a turbulent economy
Keeping your team intact
Special Report on Talent Retention:
September 2009

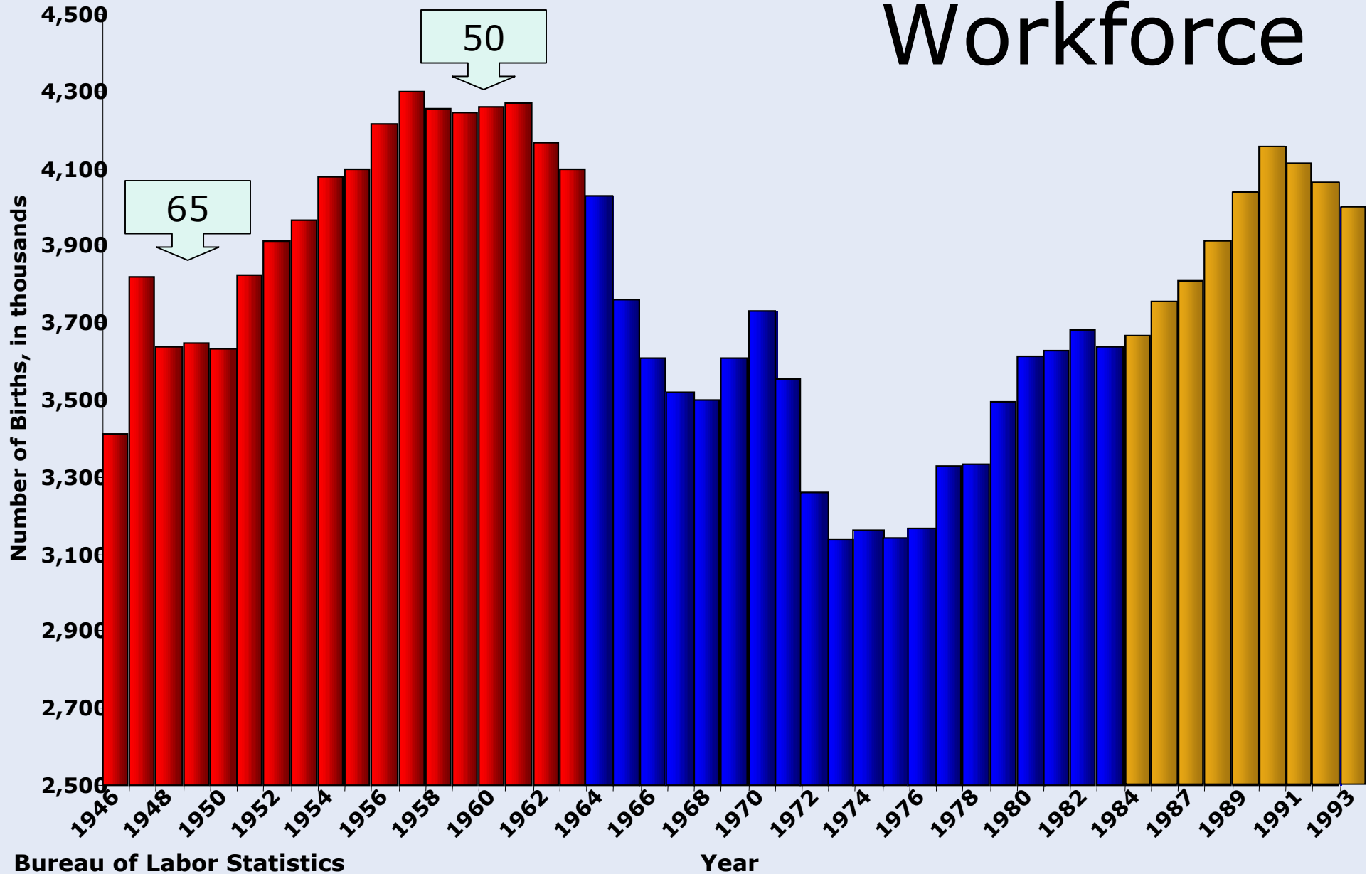


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Composition of the Workforce



Bureau of Labor Statistics

Key elements of succession planning

1. Identify key positions
 - Competencies and experiences to qualify
2. Identification of key individuals
 - Assessment of performance and potential
3. Assessment of key individuals
 - Identify priority areas to develop for readiness
4. Generation of individual development plans
 - Develop 12 month individual development plan
5. Development monitoring and review
 - Review progress and refresh plan



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Integrating professional coaching into the succession planning process

Systemic approach to close the readiness gap

- Coaching vs. mentoring vs. manager as coach
- Different foci for the coaching and when to use each
- Measuring effectiveness of strategy & delivery



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The Differences

Coach

- Focus on client's performance
- Most frequently selected by the organization
- Specific agenda or coaching plan
- Dealing tasks and responsibilities

Mentor

- Focus on the individual
- Most frequently selected by the individual seeking a mentor
- Offers support, advise, and suggestions.

Manager as Coach

- Ask powerful questions
- Encourage staff to come to their own conclusions
- Delegate more and supervise less
- Provide regular feedback
- Challenge staff to stretch by modeling



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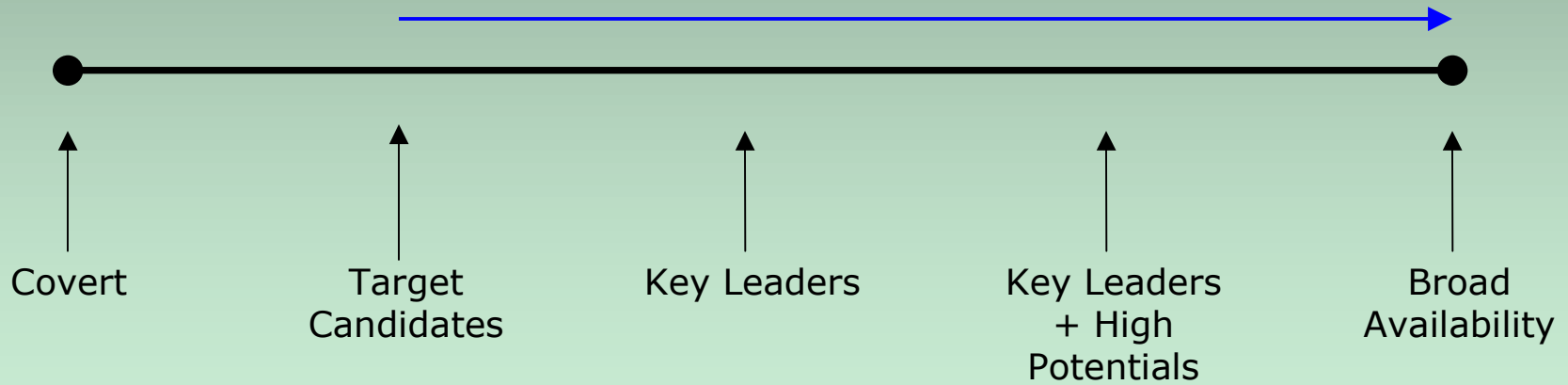
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FACTOR #1 – System Entry (access to coaching)



<http://nasapeople.nasa.gov/training/coachmentor/>



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National Aeronautics
and Space Administration

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HR POLICIES & PROGRAMS

NASA JOBS

LIFE EVENTS

NASA WORKFORCE PROFILE

TRAINING & LEADERSHIP DEV.

Coaching

In addition to technological advancement, NASA is also committed to excellence in human development. The Agency has embraced coaching to improve the efficiency, creativity, and capabilities of its employees. Each coaching program is a distinct means of building unique and mutually beneficial relationships to develop, expand, and enhance the performance of employees in personal and professional endeavors. The programs involve strategic planning, the setting of concise goals, and consistent interaction in a variety of situations and relationships to ensure that the experiences and characteristics of all participants yield a maximum benefit and measurable results. Through different approaches to improvement, coaching makes the best use of the contributions of NASA employees.

- ["Coaching Philosophy and Guidance" presentation](#)
- ["2010 Coaching Strategy" presentation](#)
- [Coaching Action Plan and Final Check-In](#)
- [Coaching Agreement Form](#)
- [Coaching Application Form](#)
- [Coaching Application Companion](#)
- [Coaching Engagement Process Steps](#)
- [NASA Coaching Process](#)

National Aeronautics and Space Administration



NASA Training and Leadership Development

Agency Coaching Program

Coaching Philosophy and Guidance

September 2009

www.nasa.gov





NASA Coaching Philosophy

Coaching is an intensive one-on-one professional relationship that is structured toward accelerating the development and effectiveness of high potentials in the Agency. Coaching is targeted at key roles within an organization in support of mission success.

The overarching goal is to produce results that are observable, measurable, and commensurate with the performance requirements of the person being coached.

A primary focus is placed upon increased awareness, accelerated development, and alignment of the individual and organizational goals.

Assumptions

- The coaching relationship focuses on a specific topic or area of development.
- The coaching relationship takes place over a defined period of time commensurate with the coaching topic.
- At the end of a coaching relationship the coachee will:
 - Have an increased capability to work more broadly and productively around the topic.
 - Be able to sustain his/her learning around the topic beyond the coaching relationship.
 - Show results that positively impact the organization.



Assumptions

Coaching is one developmental tool available to employees and should be used in combination with the full spectrum of Training & Development opportunities.

Please visit <http://nasapeople.nasa.gov/Training/default.htm> for additional information on the complete portfolio of development options.



Strategic Coaching Options

- **High Potential/Key Roles**
 - Coaching for Supervisors
 - Coaching for Senior Leaders
 - Coaching for Executives
 - High Potential Leadership Development
- **Transition**
 - Coaching for New Supervisors
 - Coaching for New Executives
- **Accelerated Learning & Development**
 - Systems Engineering Leadership Development Program (SELDP)
 - Leading Through Effective Communication (LEC)
 - Mid-level Leader Program (MLLP)
- **Targeted**
- **Skill/Topic**

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NASA Training and Leadership Development

Coaching Action Plan & Final Check-In

The following document is developed by the coaching participant in partnership with his or her coach, and serves as a roadmap for the coaching engagement. The sharing of this plan with any other individual (e.g. the boss) is usually optional at the discretion of the participant, within the requirements of the organization's coaching program.

+

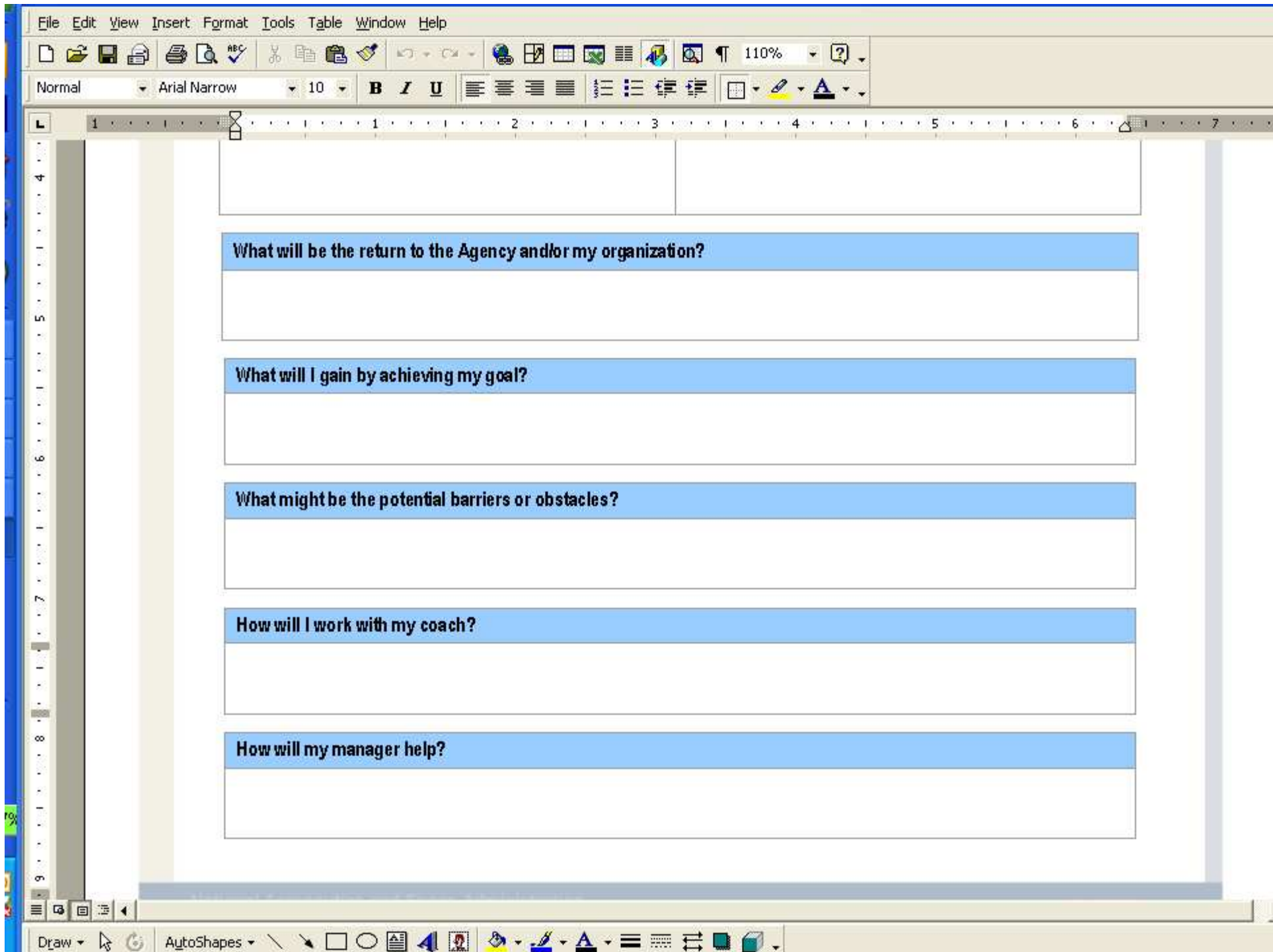
Participant	Coach	Date Updated

Coaching Goal(s) (including completion dates and/or timeframe)

What will be different?

Behavior From:	To:


Draw AutoShapes



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Final Check-In

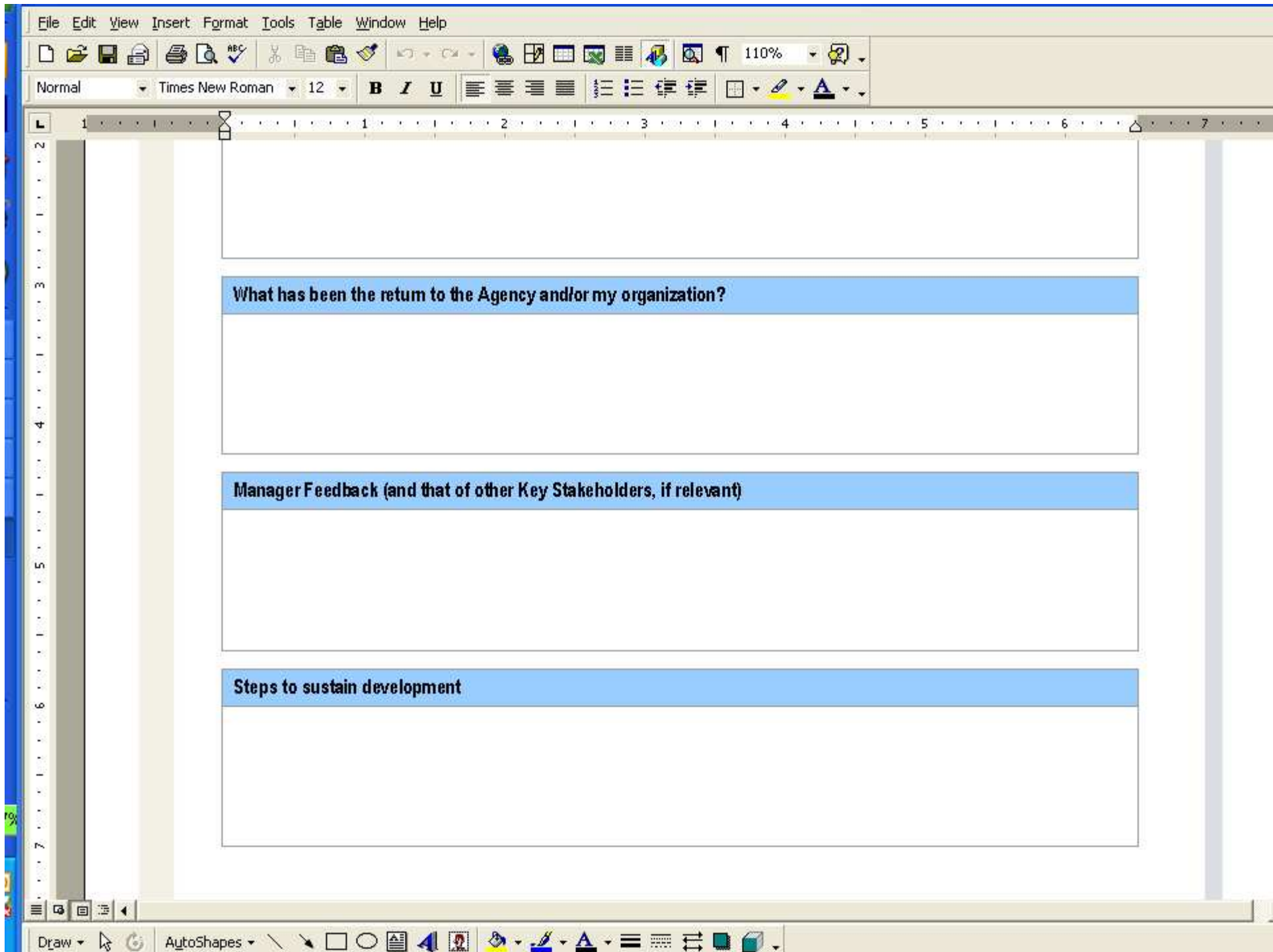
As a coaching engagement comes to a close, a final check-in provides an opportunity for participant and coach to document their accomplishments throughout the coaching engagement, and establish a going-forward plan for the participant that will help sustain their development.

Check-In Date

Progress Toward Goal(s)

What has been the return to the Agency and/or my organization?

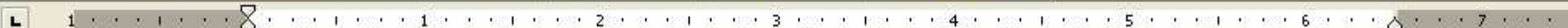
Draw AutoShapes



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What has been the return to the Agency and/or my organization?

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Manager Feedback (and that of other Key Stakeholders, if relevant)

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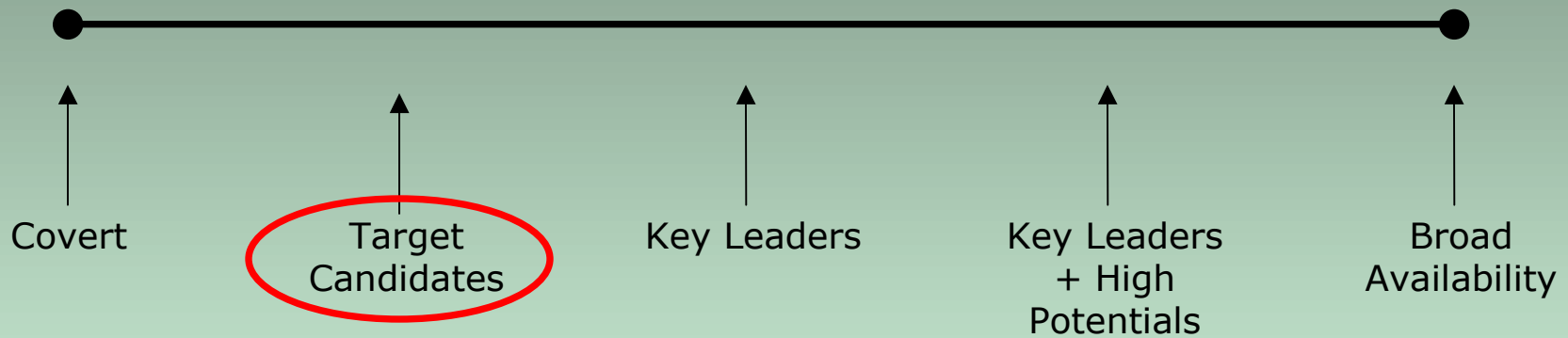
Steps to sustain development

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FACTOR #1 – System Entry (access to coaching)



<http://www.opm.gov/fedcdp/>



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http://www.opm.gov/fedcdp/

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Senior Executive Service Federal Career Development...

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Recruiting, Retaining and Honoring a World-Class Workforce to Serve the American People

Advanced Search

SES Federal Candidate Development Program

- Introduction
- Job Announcement
- Applicant Guide and FAQs
- Goals
- Application/Selection
- Educational Components
- Program Funding
- Timeline
- Resources
- Download Brochures

Introduction

The Senior Executive Service (SES) Federal Candidate Development Program (Fed CDP) will help Federal agencies meet their succession planning goals and contribute to the Government's effort to create a high-quality SES leadership corps. The information contained on this site provides information about the program and the educational model used to develop the candidates. This model includes feedback-intensive and mentoring components to further assist candidates in their developmental journey. The program will introduce candidates to the best leaders in the Federal Government.

People who complete the program and obtain certification by an SES Qualifications Review Board (QRB) may be selected for an SES position anywhere in the Federal Government without further competition.

Individuals interested in this program can start preparing to apply for upcoming opportunities by reviewing the competencies covered by the [Executive Core Qualifications](#).

Agencies interested in participating in this partnership program should review our [Fostering Future Agency Leadership brochure](#) [223 KB] and [contact us](#).

Fed CDP opportunities are posted on [USAJOBS](#) during the application period. See the left

Internet Explorer browser window showing the URL <http://www.opm.gov/fedcdp/FFALbrochurefinal.pdf>. The browser interface includes the menu bar (File, Edit, Go To, Favorites, Help), the address bar, and the toolbar with various navigation and utility icons. The page is currently on page 1 of 8, zoomed to 66.7%.

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
CENTER FOR LEADERSHIP CAPACITY SERVICES

THE SENIOR EXECUTIVE SERVICE
FEDERAL CANDIDATE DEVELOPMENT PROGRAM

FOSTERING FUTURE AGENCY LEADERSHIP



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COMPREHENSIVE LEADERSHIP TRAINING

The Fed CDP draws from the latest research on learning and leadership development. The program offers an ongoing cycle of assessment, feedback-intensive training, challenging work and learning opportunities, as well as support from mentors. Through a combination of classroom, hands-on projects, and interagency experiences, candidates will experience a powerful mix of learning methodologies to prepare them for the variety of challenges they will face as executives within the Federal Government.

PROGRAM CURRICULUM DETAILS

Classroom Learning

Program Orientation

Candidates and supervisors will be invited to a program orientation. This two-hour session will include a welcome from OPM, a briefing on the program, Q&A, and an informal networking social.

Executive Leadership Assessment Experience

Prior to attending the first week of residential classroom training, candidates will complete skills assessments and targeted readings on values-based leadership. The focus for this initial week will be fivefold:

- 1) Engaging participants in an active and supportive learning community, including a participant-led and -managed Leadership Forums Committee (formed during the first week of training);

Program Highlights

- Personalized Executive Development Plans
- Residential, Classroom, Field, and Web-based Training
- Executive Learning Teams
- Team Leadership Projects
- Individual Coaching and Mentoring
- Cabinet-level and White House Speakers
- Developmental Assignments with Leadership Responsibility
- Policy Seminars and Leadership Visits
- Field Experiences Outside Government
- Reading Groups

FACTOR #2 – Delivery

Internal Coach	External Coach
Benefits <ul style="list-style-type: none">• Reliability• Consistency• Financial constraints• Quicker, more efficient integration	Benefits <ul style="list-style-type: none">• Confidentiality• Not caught up in the company politics• Expertise• Paid only for the hours used
Challenges <ul style="list-style-type: none">• Role clarity and differentiation• Accountability issues• Maintaining confidentiality and information boundaries	Challenges <ul style="list-style-type: none">• Time to understand the true culture of the organization• Consistency when using multiple coaching firms



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FACTOR #2 – Delivery

Internal Coach vs. External Coach?

Consider the importance of -

- Political neutrality
- Objectivity in the coaching effort
- The need for expertise not available internally
- The importance of high confidentiality
- Internal integration with other organizational programs
- Cost constraints of the organization



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FACTOR #2 – Delivery

- Licensing not currently required
- International Coach Federation (ICF)
www.CoachFederation.org
 - Ethics
 - Accredit coaching schools
 - Accredit specific training programs
 - Credential individuals
 - Local and virtual chapters
- RFPs more commonly cite credentials



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FACTOR #3 – Focus

Developmental Coaching	Process Coaching	Systems Coaching
Increase readiness for promotion	Strengthen interpersonal skills	Strengthen alignment
<ul style="list-style-type: none"> • Executive Presence • Strategic thinking • Process orientation • Problem-solving • Influencing culture • Strategic networking 	<ul style="list-style-type: none"> • Conflict management • Effective time management • Effective delegation • Effective networking • Giving effective feedback • Life balance 	<ul style="list-style-type: none"> • Teams • Work Groups • Change Management • Transformation • Acquisitions • Silo busting



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Factor #4 – Measuring the effectiveness of Strategy & Delivery

- Periodic evaluation of strategy/program
- Organizational expectations for ROI calculations
- Identify existing performance metrics
- Ability to isolate the cause and effect of coaching



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Major Updates

Expansion of coaching to all levels of leaders

- Proactive vs. reaction selection of coaching clients
- Stronger, more intentional link of coaching to the NASA Leadership Model
- NASA standards around structure, length of time within engagements, and delivery of coaching
- Use of the Metrics that Matter (MTM) tool to evaluate engagements
- Inclusion of coaching in SATERN, recorded on participant learning history
- Change in funding strategy
 - Agency priorities -Program funded engagements
 - Center slot allocations
 - Center funded engagements

FACTOR #4 – Measuring the effectiveness of Strategy & Delivery

Corporate Learning Strategies: The Fallacy of ROI Calculations, Daniel R. Tobin, Ph.D. (1998)

Executive Coaching Yields Return of Almost Six Times its Cost!, Work/Life Solutions, Inc., Manchester, Inc. (2001)

Measuring Snowflakes? Calculating the Return on Investment of Executive Coaching, Dr. Sabine Dembkowski and Fiona Eldridge, The Coaching and Mentoring Network (2003)

Measuring ROI in Coaching Relationships, Amy Selwyn (2005)

The ROI of Leadership Coaching: Three Key Insights for Value Creation, Dianna L. Anderson and Merrill C. Anderson, Ph.D., MetrixGlobal (2005)

Building the Business Case for Coaching, Dianna L. Anderson and Merrill C. Anderson, Ph.D., MetrixGlobal (2006)

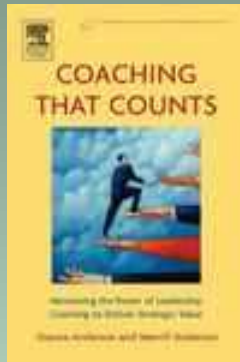
Executive Coaching: An HR View of What Works (Summary of Research), Dr. Gavin R. Dagley, Australian Human Resources Institute (2007)



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Coaching That Counts
Harnessing the Power of
Leadership Coaching to
Deliver Strategic Value
Dianna Anderson and
Merrill Anderson

- how coaching adds value for individuals and organizations.
- distinguish how coaching differs from other development interventions
- process for creating effective measurement programs. how to design, deliver, measure and evaluate coaching that adds real value



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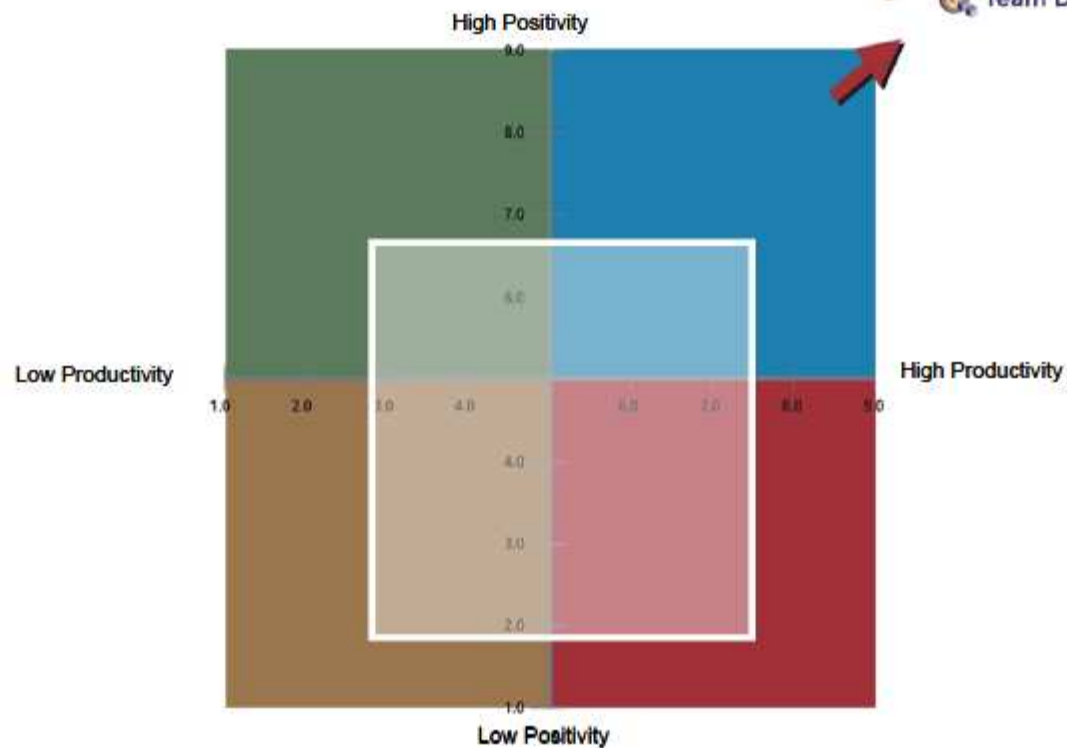
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Team Matrix Position



Team Diagnostic ASSESSMENT

<http://www.theflourishingcompany.com/images/Sample%20Team%20Diagnostic%20Report.pdf>

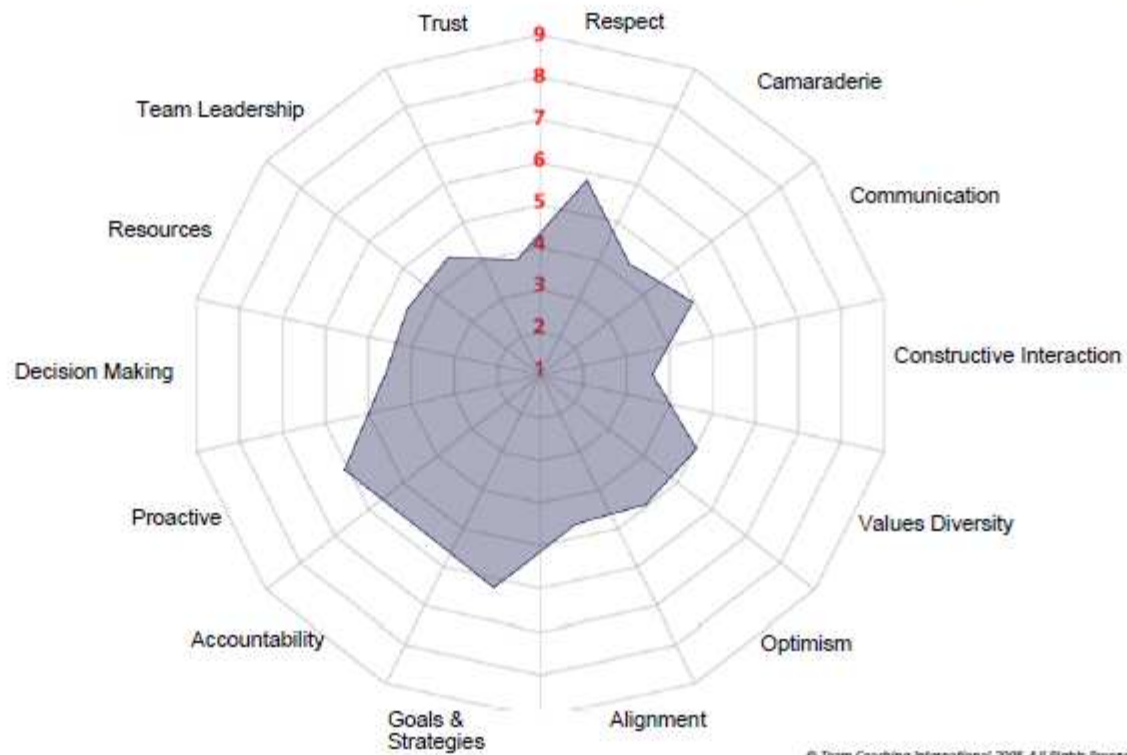
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Polar Diagram

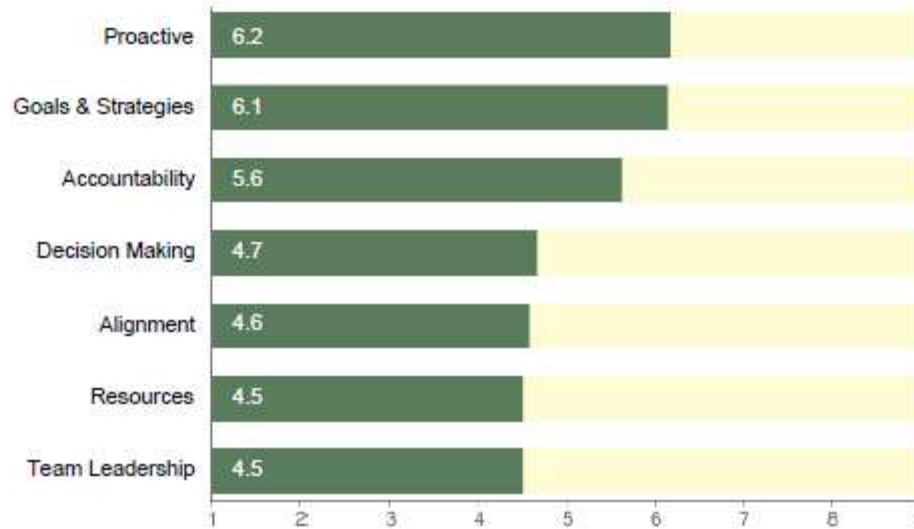


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Productivity Strengths



Productivity Strengths Rating



"1" = Does Not At All Describe Our Team

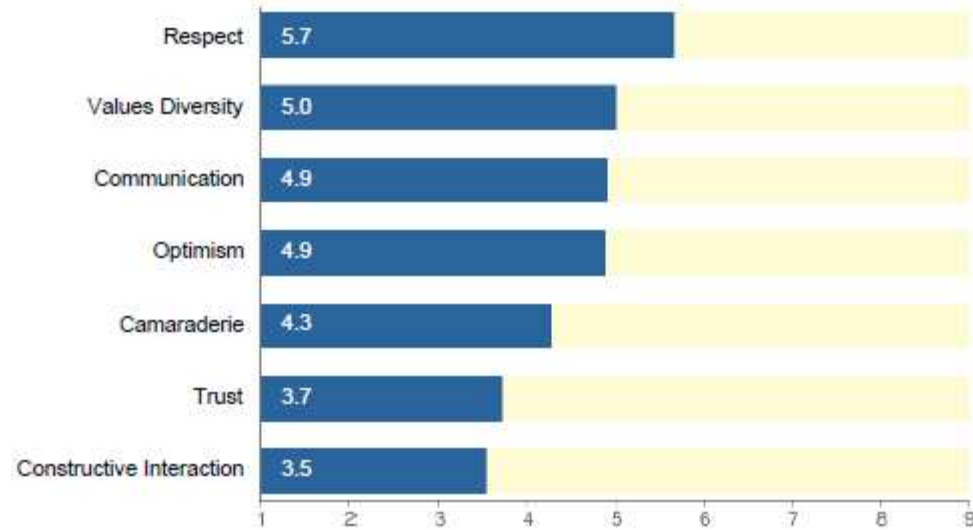
"9" = Completely Describes Our Team

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Positivity Strengths



Positivity Strengths Rating



"1" = Does Not At All Describe Our Team

"9" = Completely Describes Our Team

SUMMARY

Coaching can be integrated to ensure organizational

- preparedness
- alignment
- retention

4 main factors influence the integration of coaching in the succession planning process

- Point of entry
- Delivery
- Focus
- Measurement



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QUESTIONS?

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