

AAR for JOE:

Fourth Revised Draft:

This AAR process was initiated at the 6 month mark of working together. The first mini survey had just been completed. This was a dynamic process and its completion continued over the remainder of the year long coaching process.

After Action Review on APEX Leadership Program

## **1) What did you set out to do in the coaching process a year ago?**

I was fortunate that John Adams and John Washington enrolled me for the APEX program last October. As part of the coaching process, there were several leadership behavioral profiles that I wanted to work on based on the 360-degree feedback process input that I got my stakeholders-that is manager, manager's manager, peers, direct reports and colleagues.

The first 2 objectives that I selected based on the first mini-survey feedback are:

1. I will delegate effectively by providing clear directions and by pushing accountability and decision making down to my team.
2. I will collaborate and communicate effectively with the ACF Leadership Team to raise the collective IQ and focus of the team.

My objectives for 2nd mini-survey again based on input from stakeholders are:

- A) I will focus my energy on the critical few issues that need to be addressed; confirm and clarify with individuals to manage my time effectively and work smarter.
- B) I will be proactive and assertive to strike a balance of civility and positive creative tension to ensure that Customer Financing's end objectives are met.

I also learnt during the process that I wanted to significantly improve my communications skills-constant flow of energy in my communications instead of up/downs, use of proper language that moves me forward in my thinking and my perceptions of others and others of myself. I also realized that being proactive with my stakeholders on feedback and feedforward to ensure their input was key for my future leadership development.

## **2) What actually happened during the year?**

This was a roll coaster ride through out the year with some major shifts during the year. The highlights during the year are:

- 1) John Adams (my manager) and I had just got approved the multi-partner strategy with the XYZ Executive Management. This meant we could build the ACF team from 14 to 27, when the rest of the company was involved in major workforce reductions. Personally I got to build my team from 5 to over 13 people.
- 2) Building my team was an exciting experience and also a perfect opportunity to practice delegation skills, which was my key objectives then. I very quickly learnt to focus on getting things done through

others by influencing them rather than do things on my own, which was a way of being for me till I enrolled in the APEX program.

3) Also working cross functionally with the business groups and within Leadership team provided me the insight to share my knowledge my colleagues and helping my colleagues to be more successful.

4) My dialogues with Chris, my coach in the APEX program, were indeed very refreshing and provided me a new perspective and insight on my leadership behaviors. I was at that stage of my career having worked long hours for over 4 years and overfilled with "content and my core expertise". I actually as part of the coaching and focusing on my 2 objectives was starting to enjoy being a leader and really working with my team to make them successful.

5) Also the 360-feedback form gave me the opportunity to continue to reinforce on my core strengths of a) collaborating across organizations and functions b) continuing to demonstrate a bias for action and for results.

6) The 360-feedback form also gave me specific suggestions and feedback for the my leadership development for the next 6 months. As we continued to develop the team at that stage, the key suggestions were a) to share leadership team priorities on an ongoing basis b) provide clear functional directions with detailed roles and responsibilities and that there is ownership and accountability for each activity and measurable goals for the team as a whole and for each individual member. I realized from the feedback that the team wanted me to provide leadership by delegating as much as possible and provide a two way communication process by sharing the key goals/objectives with measurable results on an ongoing basis. The feedback/suggestions enabled me to move my focus from accomplishing things on my own to developing the team to produce even more powerful results.

7) The first mini survey was very encouraging since I had made solid improvement overall. On a scale of Minus -3 to plus +3, I scored just over +2 on my first objective on my ability to delegate effectively to my team. On my second objective to increase the IQ of the leadership team, I scored slightly less than Plus +2.

Overall the stakeholders felt that I had taken ownership of changing my behavior as part of my leadership development and made good progress on it. I was gratified with the results specifically in the improvement I had made in establishing a two-way communication with the team and the positive impact I had by spending time in developing the team by focusing on delegation. My team was recognized for its self-starter initiative and the team building spirit to get things done in a fast-paced, changing environment.

8) My stakeholders specifically commented on providing much clearer directions and priorities and overall communication with the team. The stakeholders commented that I had changed my weekly meeting formats to provide more directions, clearer priorities and measurable goals. I also got credit for communicating effectively the ACF strategy and linking it to the teams' individual projects and tasks. The survey also pointed improvement in my collaborations skills, specifically in my ability to comfortably assert myself and confidently present my ideas to Senior Management.

9) The first min-survey feedback from my colleagues and peers made realize that I needed to communicate even more with colleagues and peers outside of ACF. These are other ACF stakeholders such as the Business Groups, Corporate functions such as Credit, Legal, Contracts, Taxes and Administrative functions. Since then I have made it a point to communicate on my project updates frequently and have built 1-1 relationship with key functional leaders.

10) Around half way though the program, there were some major changes in the team. We had a major-lay-off in the team and my manager also lost his job. I had the opportunity to interview for that position but did not get the job. I have a new manager and reduced responsibilities. This has been a painful transition and being able to survive these changes will strengthen me from within for the long run.

11) My coaching objectives of focusing on the critical few and the balance of civility and positive creative

tension have provided me personal goals to achieve in these uncertain times. I believe that I really have made good progress on focusing on the critical few and where possible on creating positive tension with civility. The second mini-survey will confirm this towards end of the month.

12) My coaching sessions with Chris has been very exciting, insightful and refreshing. My discussions with Chris and the reading material that Chris has provided me has provided me:

a) Focusing in improving my communications skills though focus on my use of language and constant flow of energy. Result is much more positive and clearer communications with people.

b) Distinguishing between dialogue and discussion, Being in Control versus being Effective-power to enhance my communications effectiveness

c) Other key reading and discussions with Chris that have provided me really value are:

i) The Tipping Point book-stickiness factor, power of the few and importance of context.

ii) Change the World-Robert Quinn-Power of Transformational perspective

iii) Having a Successful Mindset-The Coaches Playbook

iv) Marshall Goldsmith Coaching Process

v) Informal Influence Do and Don'ts and the importance of each

vi) Leadership Styles Do and Don'ts and the importance of each

### **3) Why did this happen?**

I had realized that for me to develop myself as leader based on the specific feedback from my stakeholders that I would need to push myself out of my comfort zone. I would need to experiment and push the envelope on an ongoing basis to accomplish and make meaningful progress on my leadership development goals. Early on it was uncomfortable for me to ask for ongoing personal feedback but with the help of Chris, I was able to engage with my stakeholders on an ongoing basis.

The major events happened for the following reasons from my perspective:

a) The major re-organization in the group was the result of economic situation and XYZ's role in the technology industry. Also that ACF was not able to deliver very quickly in terms of revenue growth support caused management to reduce resources in the team and cost my manager his job.

b) I was able to deliver significant improvement on my 2 objectives of delegation and collaboration with the team. Part of it the constant coaching I got from my coach and other half is my being sensitive to my team's needs and the feedback I got from them. Also being able to achieve results through influencing rather than doing it on my own, seemed very refreshing. Just being engaged with the team in providing direction, guidance and really listening to them was also insightful and a huge eye-opener for me.

c) Learning the leadership styles and the distinctions on delegation versus directing and able to and willingness from leadership styles helped me to work easily with others.

d) Investing time in working with others and communicating more effectively by making my message more sticky and memorable helped me in my collaborations skills with my colleagues

e) Overall, the leadership behavior profile was made possible through the feedforward mechanism. The power of feedforward and suggestion mechanism and changing perception is truly what I have derived from the coaching.

f) Also by pushing myself outside of my professional comfort zone, enabled me to step outside of my comfort zone in my personal life too. On my Hawaii vacation, I participated for the first time in water activities such as snorkeling, jet skiing and surfing something that was very afraid of before and would not have even attempted it.

g) The progress I made by working with my coach enabled me to share powerfully the benefits of executive coaching with my colleagues and friends and family.

## **4) What are you going to do moving forward as a result of this year long opportunity XYZ has provided to you?**

This program has been an outstanding experience for me. Working with Chris has truly been a marvellous learning experience. I truly enjoy being a leader now and I want to learn and develop myself further as a Leader.

a) I will continue to use the feedforward mechanism on a regular basis. Regular basis means asking folks for things I can improve in my frequent conversations with them. Will create a key team of stakeholders that I can work with. Will also use the mini-survey to get formal feedback from my stakeholders.

b) Continue to focus on delegation, collaboration, creative tension and focusing on the critical few in my daily work.

c) To further my leadership behavioral development, there are a few areas that I have identified that I am interested in pursuing. I will have a dialogue with John Washington, my key sponsor for this program, to keep providing me the opportunity for the next year. The topics are:

i) Improve my decision making by soliciting and listening to different points of view. I would like to seek out and value different opinions.

ii) Raise my communication skills bar with others through appropriate use of language, using the right flow of energy, asking questions, and learning to influence in an informal environment. Being more assertive and proactive in my collaboration with others especially at the Executive Level.

Joe