

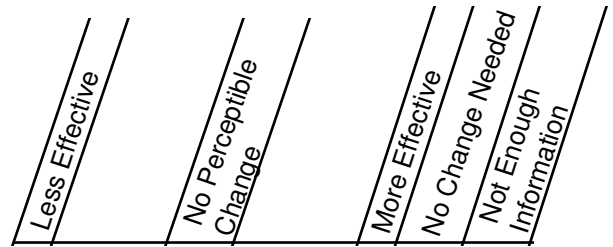
## **Mini-Survey Feedback and After Action Review**

# **James**

**This Coaching engagement was from November 06 to December 07. James was the Regional Manager for a large international Beverage company**

### **Mini-Survey Summary Feedback from Direct Reports of James**

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-3   -2   -1   0   +1   +2   +3

Please rate any change in James's behavior over the past few months:								
Engages in frequent and meaningful development discussions and dialogues for the purpose of establishing challenging and relevant assignments/special projects in order to <b>delegate appropriately, manage his time more effectively</b> , and manage performance.....				1		2	2	
Has further developed <b>communication skills</b> specifically, expressing ideas clearly and logically and using active <b>listening skills</b> and together get <b>clarity on desired results</b> , ground rules, measurement and <b>accountability</b> .....						3	2	
Response and Follow-Up								
Has the James talked with you about his stated goals?	YES = 5		NO = 0					
How much follow-up has James done with you to seek your feedback and suggestions (feedforward) on these specific leadership goals?								
	He has not asked for Feedback or Feedforward							
	2	He has done SOME Follow-Up						
	3	He has done CONSISTENT/PERIODIC Follow-Up						
Please provide additional comments/suggestions for James...								

**What specifically has James done in the past few months that you want to reinforce and encourage him to continue?**

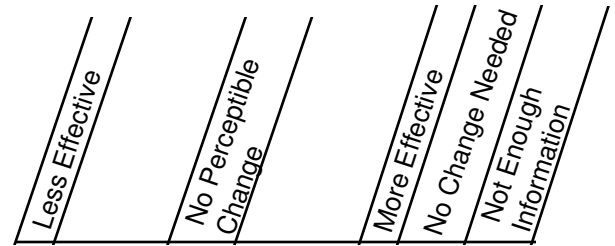
- James has **begun to express my goals as part of his goals**. It's nice to know we're in this together.
- James has **stated he will begin to take a stand in support of the channel group's initiatives**...to help us hit our mutual goals. He says he will go to "battle" more often for us. Thanks! We're in this together.
- Due to tight schedules or conflict in scheduling, it was difficult for us to meet periodically. We've met approximately twice. **Both of us need to prioritize this matter to make the process more effective.**
- I've been out consistently over the past 3 weeks, so our contact has been very limited. None the less, I **continue to see improvements when we meet for our monthly meetings. He is using clear and concise agendas** that are not too long. They are clear and executable.
- Just today, we had a problem with the roll out of the..... **James took charge and delegated appropriately and** clearly described the situation to both Bonita and I. He asked us to wait until he **could obtain clarification and would then communicate back to us on what actions to take.**
- **More productive and informative staff meetings**
- Provided status on projects even when our involvement is limited

**What suggestions (feedforward) would you give James so there will be continued improvement in the future?**

- **James is definitely making an effort to improve, he is slowing down and not making hasty decisions.**
- **Continue to be clear and concise on expectations** and responsibilities of projects – periodic updates
- **Definitely see progress and we appreciate the focused effort!** Sometimes we're in constant motion that we tend to default on "assumptions" (assuming both parties understood each other). We need to remind ourselves to always find the time to seek for confirmation to ensure the communication was effective.
- **I would like to talk about when, where appropriate, I could participate in special projects to help the company while also providing me important developmental exposure to other members of the management team.**
- **Keep us updated on Regional objectives and successes**
- **When appropriate, I would like to have a meaningful discussion about my value to the company and where the co. would like to see me contribute in the future. I would hope that this discussion would include my aspirations as well.**

## Mini-Survey Summary

### Feedback from Manager and Associates/Peers of James



-3   -2   -1   0   +1   +2   +3

Please rate any change in James's behavior over the past few months:								
Engages in frequent and meaningful development discussions and dialogues for the purpose of establishing challenging and relevant assignments/special projects in order to delegate appropriately, manage his time more effectively, and manage performance.....				1		2	1 M	
Has further developed communication skills specifically, expressing ideas clearly and logically and using active listening skills and together get clarity on desired results, ground rules, measurement and accountability.....				1		1 M	2	
Response and Follow-Up								
Has the James talked with you about his stated goals?	YES = 4		NO = 1					
How much follow-up has James done with you to seek your feedback and suggestions (feedforward) on these specific leadership goals?	1	He has not asked for Feedback or Feedforward						
	2	He has done SOME Follow-Up						
	M	He has done CONSISTENT/PERIODIC Follow-Up						
Please provide additional comments/suggestions for James...								

**What specifically has James done in the past few months that you want to reinforce and encourage him to continue?**

- M He is being more brief and to the point .in his conversations**
- Communicate in writing.
  - **He has made a effort to be clearer in his communication by being more prepared in meetings and discussions. He has thought more about what he is trying to communicate before speaking making his message clearer.**
  - **He is better about saying, “I want to process this with you” so communication may still be a bit scattered, but at least he is letting the receiver know ahead of time that his thoughts are not completely buttoned up.**
  - Set up meeting time to review critical issues.
  - **Updated the chain ad alert activity form using the suggestions we made. Listening.**

## What suggestions (feedforward) would you give James so there will be continued improvement in the future?

**M** Ask for more feedback immediately following an interaction, meeting, conference call, versus waiting a week or two.

- James has openly asked for clarification, but doesn't appear to comprehend ideas and thoughts. Often the goals, measurement and accountability do not match the intended or agreed-upon initiatives.
- He needs to assign projects and manage performance – if he is unable to do it, likely it doesn't get completed.
- Still had communications issues on the 5-L ..... proposal. Sometimes when James has an agenda he wants to move forward, hard to get points across to him since he doesn't always listen while he's selling his agenda.
- When meeting with me, he "unloads" a laundry list and follow up to list is not always consistent or noticeable – does anything get accomplished?

## The AAR was prepared totally by James

**Subject:** After Action Review and Next Steps      **Date:** 12/3/07

I thought it relevant to take a moment of your time to review of my thoughts, observations, actions, and future plans regarding my "personal action plan" project this year. After a quick overview of how this came to be I would like to update you via four Jamesets posed as questions.

Last Spring, Ken (James previous manager) asked me if I would be interested in a development plan to help me raise my awareness and address some of my personal management and communication challenges that had been noted in my year end review. I was delighted that the senior management team was willing to invest in me in a project of this magnitude as well as **select me to inaugurate a new concept of a personal executive coach**. After thinking about it for a few days it was also clear to me that once I committed, it would take a good deal of **professionalism, courage, trust, and humility** on my part to expose and acknowledge my challenges to my peers and direct reports soon to be selected as my "stakeholders." After all, I am unaware other Stakeholder's development focus areas noted in their personal reviews. These issues have always been approached confidentially in our organization. It was also clear that it would take **a good deal of commitment as well as courage on the part of my Stakeholder's to let go of the past and offer candid feedback**.

I interviewed two candidates and selected Chris Coffey as my coach. I have not regretted my decision. I am and will continue to be fully committed to improving my skills.

### **1) What did I set out to do?**

To quote my original action plan discussed and approved by Ken there were two areas where I was to focus:



2 Peers and 1 direct report did not submit a survey response (Sharon out on leave)

<u>Communication</u>	Direct Reports							Peers						
	-3	-2	-1	0	+1	+2	+3	-3	-2	-1	0	+1	+2	+3
Less Effective														
No Perceptive Change											1			
More Effective						2	2						2	2
No Change needed														
Not enough Information														

<u>“Has talked with you about his stated goals”</u>	<u>Yes</u>	<u>No</u>
Direct Reports	5	
Peers	3	1

<u>“Ask for feedback and Suggestions”</u>	<u>Asked for Some</u>	<u>Not Asked</u>	<u>Consistently Asked</u>
Direct Reports	3		2
Peers	4	1	

**There were also many specific comments submitted as reinforcement, encouragement, and feed forward suggestions which are available upon request.**

Of note were the detailed constructive criticisms given from some of my peers regarding the need for more effective follow up communication on projects and continuing to elevate my listening skills. These candid observations are appreciated and will be addressed.

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

I have improved my delegating and communicating skills because:

- **My willingness to go "public"**
- **My Stakeholders have been willing to let go of the past**
- I have more productive one on one meeting with my peers and direct reports
- I have **shared my action plans** and have built future plans off of my Stakeholder’s suggestions
- I listen better and more **actively check for clarity**
- **I have started to change perceptions**
- **My Stakeholders are more willing to offer candid feedback**
- I have utilized my Stakeholder’s feedback and forward suggestions

### **4) What am I going to do about it? – Next Steps**

- Solicit more feed forward suggestions from my stakeholders and ask for feedback more often as brought to my attention in my survey
- Elevate effort to eliminate the three (3) “No Perceptive Change” scores noted in survey
- Address specific comments given to me in survey (many of which I was unaware!)
- Continue to meet with Chris for one on one coaching
- Continue to incorporate techniques to develop my communication and listening skills
- Meet with each of my staff members more often and delegate appropriate projects

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- Bring Allan (James's new manager) aboard and incorporate his feedback and directions
- **Utilize Situational Leadership skills learned**
- **Continue to develop trust with my stakeholders** so that they will offer even greater and more detailed feedback and feed forward suggestions
- Serve up my own feedback and feed forward suggestions to my Stakeholders in the interest of overall improvement
- "Manage up" more effectively
- Conduct additional survey at an agreed upon time

As noted in my e-mail from 12/01 I am truly appreciative and thankful for the opportunity I have been given to work with Chris Coffey and pioneer the one on one coaching concept within HUSA. I believe positive momentum is developing amongst my team and peers.

I have recently learned that our agreement with Chris is about to expire at the end of January. I would prefer my coaching to continue if possible for I believe it of great value to me as well as my Stakeholders. I will follow through with Allan on this request.

Regardless, I now have a firm base from which to further build and improve these skills. I look forward to capitalizing on this energy in 2007 and beyond for the overall benefit of our team.

I welcome your continued comments and feedback.

James