



Mini-Survey Feedback

April 2011

for

Jerry Rice

Jerry is a General Manager in a major Insurance company. Chris worked with Jerry from March 2010 until April 2011



Mini-Survey Feedback Report for JerryRice

		<i>Less Effective</i>		<i>No Perceptible Change</i>		<i>More Effective</i>	<i>No Change Needed</i>	<i>Not Enough Information</i>	
	-3	-2	-1	0	+1	+2	+3	+3	NI
1. Is building trust across Divisional / Departmental lines				2		2	5	1	
Self							S		
2. Collaborates effectively				1	1	2	6		
Self							S		

Response and Follow-Up		
Has Jerrytalked with you about his stated goals?	YES = S, 10	NO = 0

To what extent has Jerryfollowed-up with you on the areas that he has committed to improve?		No Perceptible Follow-Up
	2	Little Follow-Up
	S, 4	Some Follow-Up
	4	Consistent (Periodic) Follow-Up

Please provide additional comments/suggestions for Graham's consideration ...
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What specifically has Jerry done to improve that you want to acknowledge and reinforce?

- As a result of his open mind, I believe Jerry has become more cognizant to the talents of others.
- Expanded decision groups.
- Facilitates more open dialogue
- Jerry has become more patient, tolerant and open minded to different levels of employees
- Jerry has been more than willing to provide support by attending my local JPA meetings and helping with the SAFER Excess Liability initiatives.
- Jerry has created an environment that allows PLCA to more effectively participate in pool claims process and attend more pool functions which helps PLCA promote itself with clients.
- Jerry has provided valuable input when solicited and constructive suggestions even without solicitation
- Jerry has sought out PLCA opinion on claim/client related matters.
- Jerry has stayed true to his professional development commitment



- Jerry is collaborating more often on Superpool goals and objectives and seeks my input
- Jerry is much more positive when communicating. Less challenging and more engaging.
- Jerry was very helpful in picking up the slack and providing support to my clients and co-workers during my leave of absence.
- Great progress in compromising and meeting PLCA half-way on issues of concern
- He has a bit more patience
- He has focused on being more involved with other departments and considered their perspective(s)
- He has reached out in a very effective way, non threatening to employees
- He is happier
- He is much more apt to listen to other viewpoints than in the past
- He's friendlier and more approachable and seems to listen more attentively
- He steps back and will listen to sides before jumping in.
- Marked improvement in his relationship with PLCA and ITPA Operations
- Quick to listen. Slower to speak.
- Since July, I have much more interaction with Graham. I have found him to be very positive and coaching.
- There is a more collegial and business-like relationship between Super Pools and the rest of P&C

What suggestions (feedforward) can you provide to Jerry moving forward to improve even more?

- continue doing what he is doing
- Continue open and honest communication
- Continue to be accessible
- Continue to communicate with everyone in a professional, no abrasive manner
- Continue to develop and improve your working relationship with Steve M
- Continue to Trust
- Find a way to promote similar changes he has made with others in pool management. Specifically, with SCR and PLCA.
- Jerry Is doing a great job. Some people with long memories are still hiding behind silos.
- he shows a sensitive / open side which indicates he is "human" - which is nice.
- He still has to bridge the gap with PLCA.
- Keep open the lines of communication
- Keep up the great work!
- Keep up the team work and every coaching opportunity
- Manage body language and facial expressions more carefully in public areas when others are observing
- To truly collaborate one not only has to listen, but be willing to be open to another's point of view and be willing to change his mind, and compromise. He can't control everything.
- work collaborative with all departments

Is there any other information you would like Jerry to consider?

- be happy, I admire his approach to things and his openness and honesty.
- From my experience, Jerry is on the right track and I encourage him to continue the journey.
- From the beginning, I have commented that I had not had much interaction with Graham. As I said above, that has changed since 7/1/10. I can't speak to all of Graham's challenges, or opportunities for development,



however, I can tell you that since working more closely with him, my experience and our interaction has been positive. Jerry has reached out to me to offer assistance, support and coaching. He has provided me candid (professional but not sugar coated), direct, feedback (which I appreciate). He has demonstrated team work by assisting me as I take on expanded responsibilities.

- He has our support.
- He seems to be under more stress right now.
- Just be sure to listen objectively before taking a stand.
- Keep doing what you are doing
- Leaders will always have a few bullet holes in their back.
- Needs to continue working/mentoring Doug Ross to adopt a similar attitude to Graham's
- Not at this time.
- Please try to take the other parties point of view, position, responsibilities and the challenges they are faced with into consideration when there is a difference of opinion

1. What did I want to accomplish?

- **Build Trust Across Departmental/Divisional Lines by:**
 - **Keeping an open mind to other points of view**
 - **Focused communication**
 - **Promoting PLCA**
 - **Use fact based statements**
 - **Respect other peoples point of view**
- **Collaborate Effectively by:**
 - **Listening more**
 - **Encouraging others' input on issues**
 - **Suggesting rather than ordering**
 - **Asking for feedback**
 - **Meeting regularly with other departments**
 - **Sharing my experience openly and honestly**

2. What Actually Happened and Why?

- a. **After analyzing the feedback from a number of colleagues, I selected ten stakeholders to assist me in reaching my stated goals in conjunction with my regular coaching sessions. At first I found some of the stakeholders to be very skeptical of my intentions and I believe played along, while the majority could see I was making the effort using the tools provided**



to me by Chris. For the most part, I used the daily checklist developed by Chris to keep me focused on my goals. While this was initially a drag, now I see how powerful a tool it can be. It was important for me to also have access to Chris when needed and at short notice, which happened even when he was overseas on trips he made sure I could contact him. During this period I interacted more with those stakeholders I felt were the skeptics, while still respecting the input of the others.

- b. During the process Chris conducted two blind mini-surveys with the stakeholders in order to determine how they felt my commitment was progressing. I was pleased to note on the initial survey only two stakeholders still held negative perceptions that I had in fact deteriorated while the other stakeholders all noted improvement. The second mini-survey on the other hand showed all stakeholders had moved into the neutral or positive change areas. The difference between the two surveys' average was: i) 1.4 & 1.5 and ii) 2.2 & 2.3 on my two goals.
- c. Thanks to the support and commitment of Sean , Suzanne and the firm, I have been able to better understand certain dynamics in my life with the engaging of Chris to coach and mentor me through the past year or so. With the new skills he has taught me, it has not only enabled me to successfully complete what I set out to do, it has allowed me to use those skills within my department working with Doug Ross. Although I have not gotten Doug to the level a person of Chris' experience would, I have made progress. It makes me wonder if the likes of R, M, G and G were collaborating at a high level what value that would bring the firm. The firm's investment in me has paid off in my mind. I have been able to apply the lessons learned in Steering and other internal committee meetings. For example I learnt the power of thoughtfulness, clarity and words have meanings to be of tremendous help during my depositions for the firm. It is my intention moving forward to continue to hone the skills, behaviors and interactions taught to me by Chris. I believe his methodology/program may be something the firm should look at on a broader front.
- d. As respects the stakeholders, initially I felt some reticence on some of their parts that I was actually committed to being coached and achieving my goals of building trust and being collaborative. What a pleasure it is to provide some of the comments/observations made by both stakeholders and other employees:
 - Dave told me Trina and Marco had complimented me on my interactions with them
 - Arlene. It is a pleasure to deal with you these days
 - Sharon . I have noted a change in you; you seem easier to talk to
 - Tara. Initially acknowledged positive improvement in my attitude and behavior towards all. She has since congratulated me on the great strides I have made interacting with iTPA and PLCA in particular
 - Dave. Making a big effort to be involved in making things happen. Had heard very positive feedback from Tara and Steve Moccardini.
 - I apologized to my son for interrupting him and he told me he had noticed a difference in our relationship for the positive.



- There are more similar comments as those above in the mini-survey.
- Due to this investment the company made in me, I have become less defensive and more open with my colleagues and friends which in turn has made life more enjoyable overall

3. What am I going to do moving forward to maximize this investment of time and money in me.?

Going forward I will continue to use the new methods and tools I have acquired in my personal interactions, more specifically continue to hone the following:

- Listen carefully without interrupting
- Suggest a course of action rather than dictate one
- Mastering the difference between dialogue and debate
- Aligning relationship quality with the importance of the issue/problem
- Incorporate the 360 feedback provided by CORE Advisors
- Continue to eliminate the use of but or however in my communications, both written and verbal
- As a part of my legacy, use what I have learned to help ingrain these methods/processes within K
- Implement more of this into my personal life

Although when I first started this program I had a negative attitude, at the present time, I realize that thanks to the firm and Chris' coaching I was saved from a possible career setback and overall found the experience to be rewarding in many ways: a happier life, stronger relationships (both internally and externally), better negotiating skills and more. I am committed to continue with this program's concepts and values because I believe in it and I've seen the positive results for me and the firm.

Again, thank you Sean and Suzanne for providing me with this opportunity.

Sincerely,
Jerry Rice