

“I Opt”

(Input Output Processing Template)

Advanced Leadership



This report has been prepared for:

Corporate Officers

4/26/2005

A composite of 182 corporate executives including 49 CEOs, 8 Subsidiary Presidents, 4 Managing Partners, 11 Executive VPs, 5 Senior VPs, 5 VP General Managers, 10 VPs with Corporate titles (e.g., CFO, General Counsel, etc.) with the balance being VPs heading various operations (e.g., Divisions, R&D, Sales, Operations, etc.).

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ADVANCED LEADERSHIP COACHING REPORT

LIMITS OF THE REPORT

PAGE 1 of Corporate Officers Report



EXPLAIN:

- ? Information processing is not everything. Other factors can, and do, influence behavior. Education, experience, upbringing, and other factors do count in setting behavior.

- ? Some of these other influences will come out in the coaching conversation.

- ? However, information processing does supply a general “framework” within which these other factors play out.

EXAMPLE:

- ? Even when working on an issue that could be resolved by new ideas applied quickly, Corporate may hesitate if there has been negative outcomes on similar issues in the past. Experience, as well as styles, influence behavior. This aspect of behavior can be addressed in the coaching interaction.

ADVANCED LEADERSHIP COACHING REPORT

DISTRIBUTION OF STYLES

PAGE 2 of Corporate Officers Report



EXPLAIN:

This paragraph refers only to the primary style. Everyone can use all of the styles. This is just the one that Corporate favors most. It is also the one most likely to be associated with Corporate by others.

? **SAY** that most of the people in the world do **NOT** use the RI (new ideas) approach as their basic way of navigating life.

? **SHOW** the Distribution of Strategic Styles graphic on the next page.

BACKGROUND FOR STYLE DISTRIBUTION GRAPHIC (Next Page):

The distribution draws on all levels (CEO to janitor) in all types of organizations (profit, non-profit, government, military, municipalities, agencies, etc.).

Other people are likely to see the idea-oriented RI strategy as Corporate's overall preference. The fact that they may not share the same approach may make Corporate's preference stand out more vividly.

ASK:

How many people in the group being lead share Corporate's orientation toward new, often groundbreaking, ideas (RI) when addressing an issue?

BACKGROUND FOR QUESTION:

The question is designed to help reinforce that not all people share Corporate's approach.

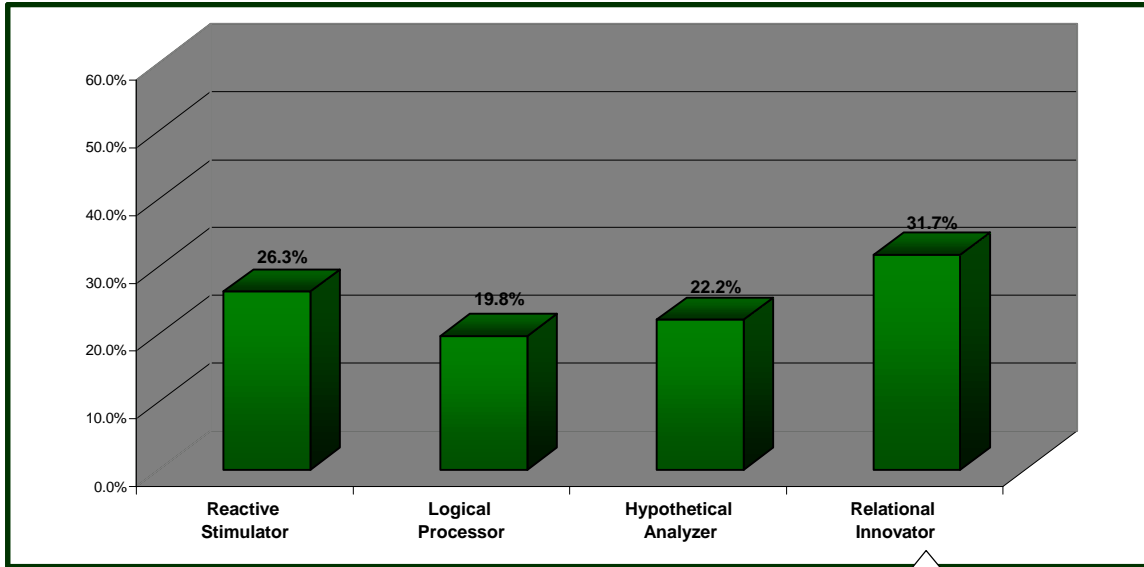
One goal of an organization is a mix of people who cover all of the bases involved in the mission of the group.

Potential follow-up question:

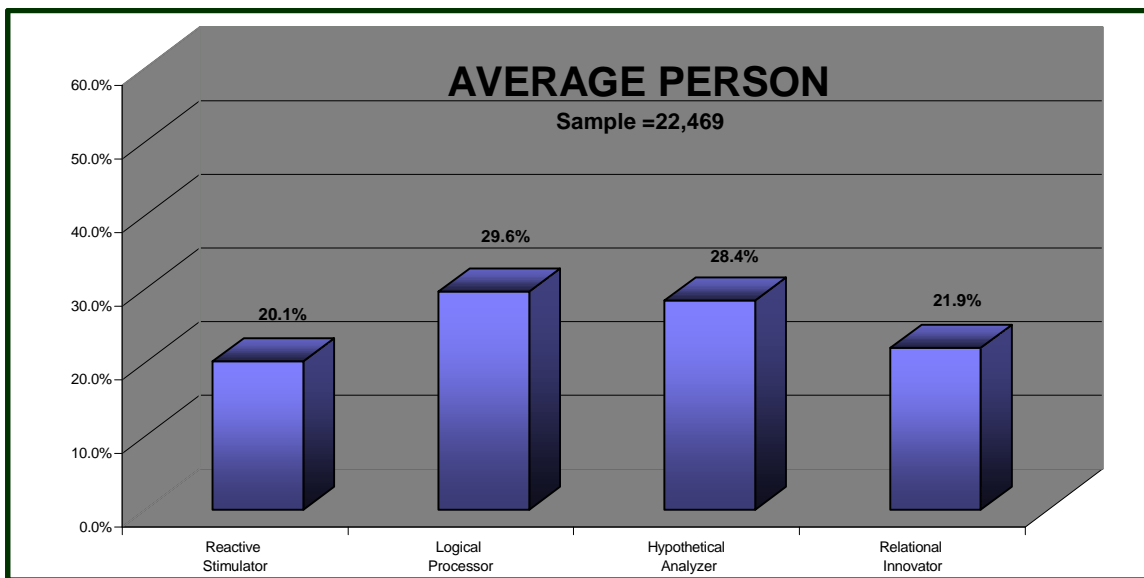
Do these other people cover bases that you do not want to cover yourself?

ADVANCED LEADERSHIP CONSULTANT REPORT DISTRIBUTION OF STYLES

Corporate Officers Style Distribution



↑
Dominant Style



ADVANCED LEADERSHIP COACHING REPORT

PRIMARY RELATIONAL INNOVATOR STYLE

PAGE 3 of Corporate Officers Report

COACHING BACKGROUND:

The purpose of the bullets is to give an idea of behaviors “falling out” of the primary style. For example, focusing on new approaches automatically prevents using trusted, standard methods for an issue. Whether a posture is good or bad depends on the issue being addressed.

ASK:

Does a general posture of sticking closely to methods that are already known seem to be “wrong” or “short sighted” to you?

BACKGROUND FOR QUESTION:

People do things because they believe it is the “right” thing to do. This can cause people who use different kinds of input to feel frustration, irritation, or even anger.

Potential follow-up:

Do you see any value in people who use a detailed, methodical, and perhaps plodding approach?

How accurately do you think the bullet points reflect your leadership approach?

COACHING BACKGROUND:

People have access to and use all four information-processing styles. This section shows how likely it is that Corporate’s dominant RI style will be used in a particular situation.

ASK:

Do the people you lead regularly try to get you back to “the point?”

BACKGROUND FOR QUESTION:

RIs can wander as they explore various dimensions of an issue. People using an RI style tend to believe that their diversions are enjoyable. You may have to probe on this issue. Since Corporate is the leader, there is unlikely to be direct criticism.

ASK:

Do you think that your style supports or frustrates the group’s major work?

BACKGROUND FOR QUESTION:

Expect to hear that the approach being used is valuable. Every style contributes. The issue is how much of the work being supervised by Corporate benefits from the use of the RI strategy, or if a mix heavier in another style would better serve.



ADVANCED LEADERSHIP COACHING REPORT

SECONDARY REACTIVE STIMULATOR STYLE

PAGE 4 of Corporate Officers Report

EXPLAIN:

Styles come in different strengths. The higher the score:

- ? The more quickly Corporate will be in applying it (speed of response).
- ? The more often it will be used (frequency of use).

This percentage is the probability of using the secondary style over a long series of decisions.

ASK:

Does Corporate see quick action using expedient methods as a fallback to the idea-generating (RI) posture?

BACKGROUND FOR QUESTION:

Corporate is likely to say that this kind of shift is just the “right thing to do.” Point out that people using different styles will see different “right” things to do (e.g., study, analysis, reverting to traditional methods, etc.).

ASK:

Is the group able to anticipate your shift in styles?

BACKGROUND FOR QUESTION:

If the group can anticipate a change, they can move forward without asking. Lead this into a discussion of how well Corporate’s direction can be anticipated. In other words, how fast will Corporate jump from new ideas to a “get it done using any means at hand” posture.

DISCUSS:

What can be done to make these changed expectations more predictable?

BACKGROUND FOR QUESTION:

If people can predict, they can act without being told anything. More things get done more efficiently. How can the group tell when it is safe to move to a “get it done” or to another, less favored, posture?

What is done for people who cannot perform well following Corporate’s shifts?

BACKGROUND FOR QUESTION:

People using a more disciplined style (LP/HA) can encounter problems if they are asked to act quickly without forethought. Forcing these people to accommodate this posture can lead to frustration or worse. Does Corporate make any allowances for these people?



ADVANCED LEADERSHIP COACHING REPORT

EXAMINING THEMES

PAGE 5 of Corporate Officers Report

BACKGROUND:

- ? Themes are consistent behaviors that repeatedly occur in the group setting. They can support or frustrate the group endeavor.
- ? Themes can arise from sources other than information-processing preferences. For example, a person's upbringing can make them sensitive (or insensitive) to neatness. Or, experience in an accounting function could have made Corporate sensitive to the need for detailed organization of backup materials.



ASK:

For each theme identified in the report, does it support, frustrate, or is it neutral to the functioning of your group as a whole?

- ? Environment: Do you think some of your people would prefer a more structured, stable setting?
- ? Planning: Could more stress on operational plans (step-by-step procedures) improve productivity and quality?
- ? Coordination: Does everyone in your group value your informal approach?
- ? Motivation: Do some people seem to be less than fully receptive to your strategy? Are these the people who use a more disciplined, logical approach in their work?
- ? Communication: Would some of your people prefer a more detailed, explicit approach?
- ? Control: Does your approach give enough support to people who need more structure?

ASK:

Are there other themes you have, or are trying to establish?

Cycle through and note any other themes Corporate has or wants to install. You are trying to get an overall picture of the culture that is being established.

- ? What effect does it (or will it) have on group performance? Will it detract from anything?
- ? With who would you expect to have a problem in implementing this initiative?
How do you intend to offset or mitigate the problem with these people (if any)?

DISCUSS:

All of your themes are good. But, how well do your themes work together to maximize the mission of your group?

BACKGROUND FOR QUESTION:

There is a probability that Corporate will encounter some conflict between things that support personal advancement and those that further the mission of the group. The discussion should help Corporate balance the tradeoffs (if any).

ADVANCED LEADERSHIP COACHING REPORT

EXPLAINING PATTERNS

PAGE 6 of Corporate Officers Report

SHOW:

The “How Patterns are Generated” Coaching Supplement graph on next page.

EXPLAIN:

- ? The RI style (new ideas) is the most frequently used—(follow arrow to RI axis).
- ? RS style (instant action) is next most frequent —(follow arrow to RS axis).
- ? Connecting the RS and RI creates a triangle in the upper left quadrant.
- ? That area is called the “Changer” quadrant. The natural outcome of new ideas (RI) being applied quickly (RS) is change.
- ? The size of the “Changer” area is compared to the size of the areas in the other quadrants and is given as a percentage under each pattern name.

SHOW:

The “I Opt Snowflake” graphic that follows. Explain:

- ? The axes (horizontal and vertical) show the behaviors associated with styles.
- ? The diagonals show the behaviors associated with patterns.

ASK:

- ? Are the behaviors on the RI axis consistent with Corporate’s self-image?
- ? How about the behaviors on the RS axis?
- ? Do the Changer pattern behaviors (upper left diagonal) resemble Corporate’s preferred approach?

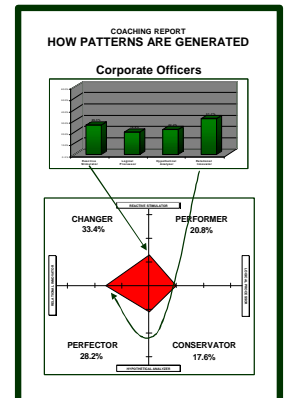
DISCUSS:

- ? How well suited are Corporate’s preferred styles (RI/RS) to the mission of the group?
- ? How important are the qualities across from Corporate’s preferred styles (i.e., HA and LP) and pattern (i.e., Conservator) to the group’s mission?

Background Discussion Note:

Corporate’s RS behaviors preclude the ones on the opposite side (HA). For example, rapid response and a careful analysis do not coexist at the same time and place—it is either one or the other. However, a thoughtful analysis is a good thing in many situations. Similarly, the Changer pattern’s orientation precludes the disciplined execution and precision preferred by the Conservator pattern (opposite diagonal from Changer). Again, precise, dependable execution is not a bad thing. Try to guide the conversation toward the recognition of the value that people using other styles bring to a group. Strictly enforcing Corporate’s approach could prevent those behaviors and the benefits they can bring.

HANDOUT 1

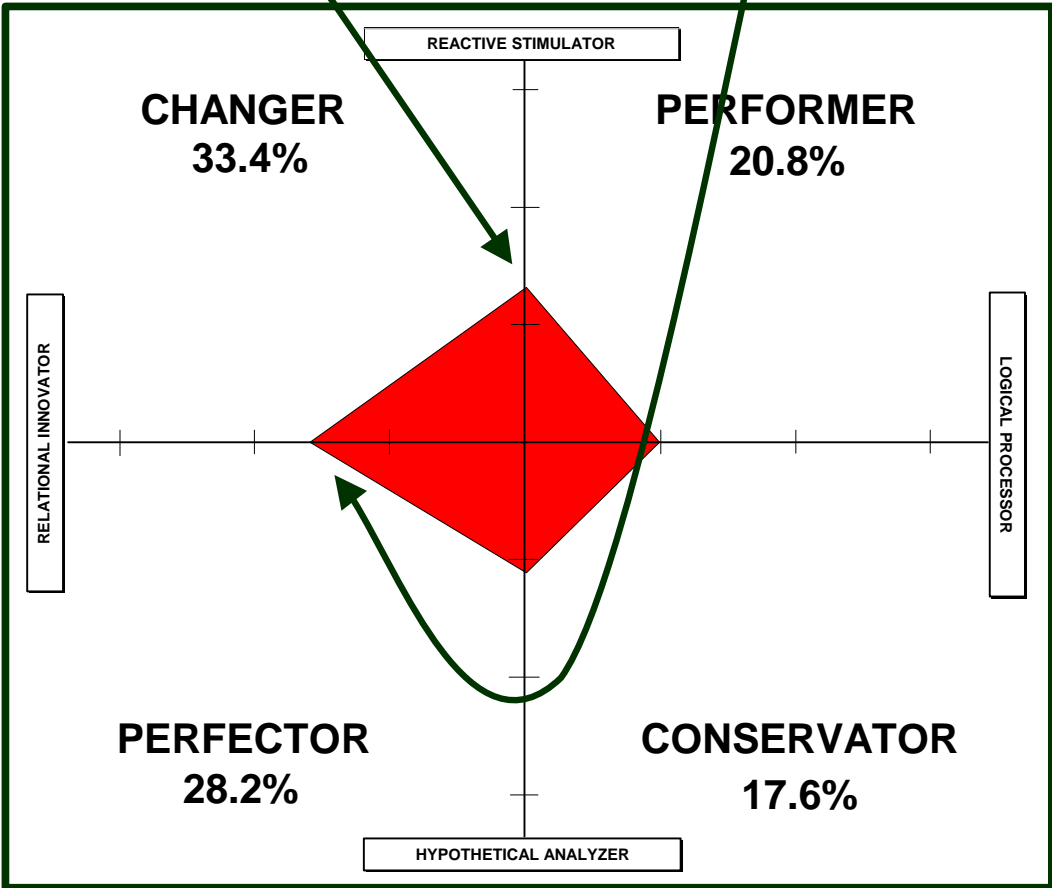
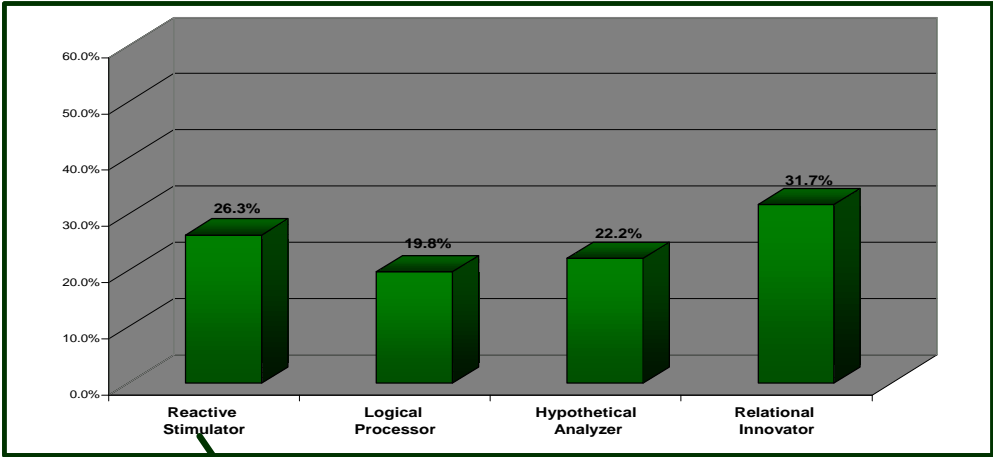


HANDOUT 2



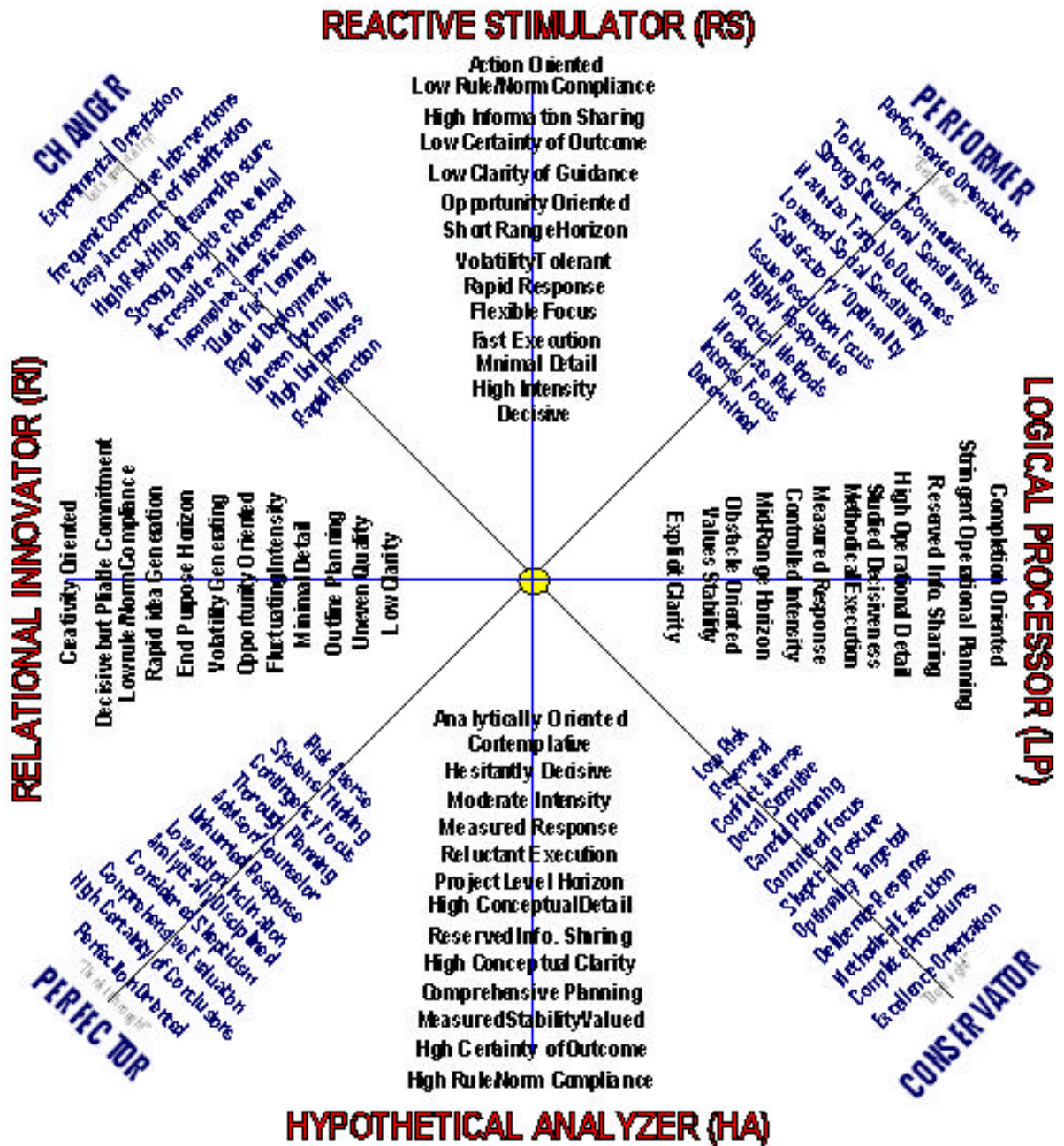
COACHING REPORT HOW PATTERNS ARE GENERATED

Corporate Officers



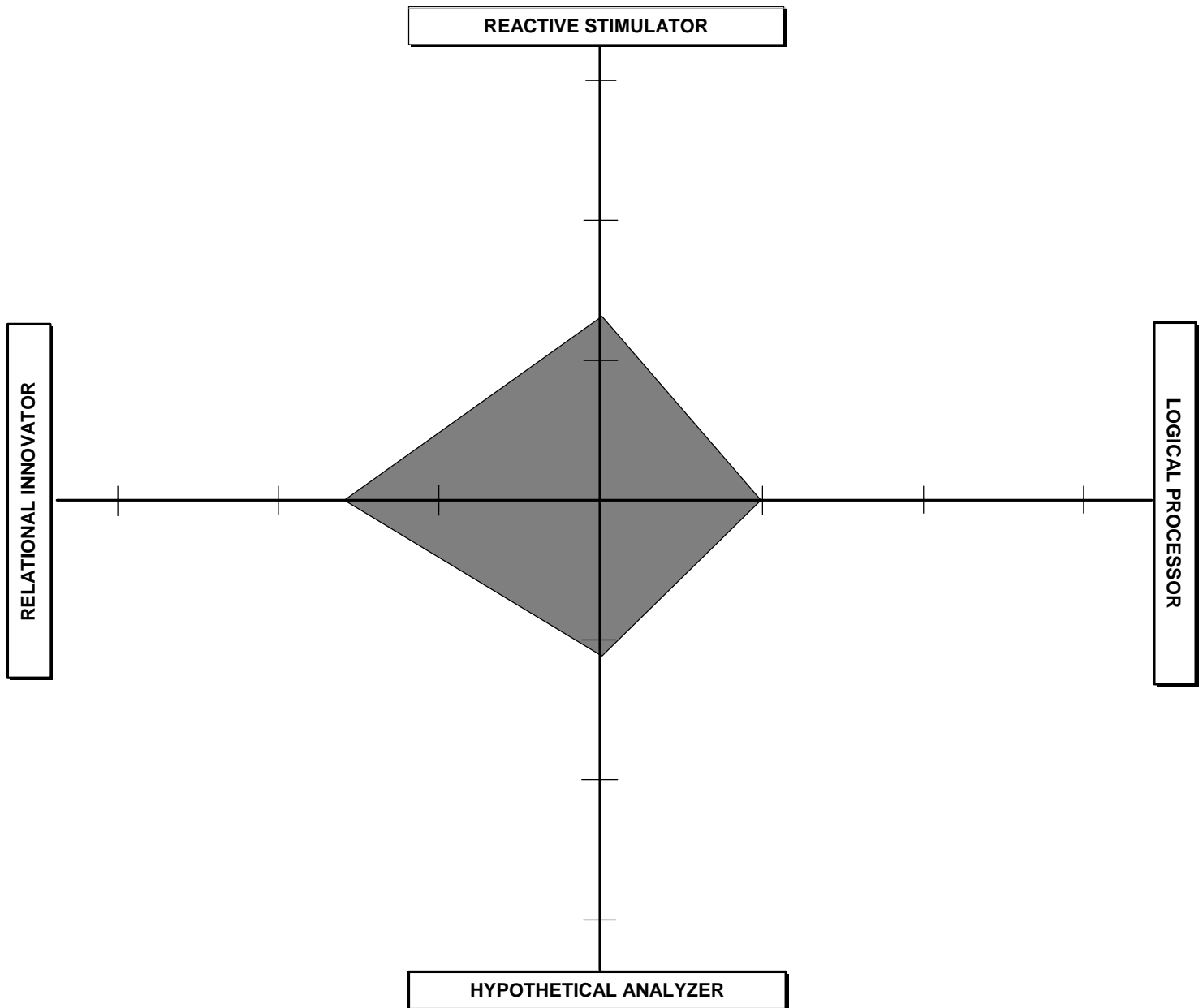
"I Opt" Snowflake

Selected Characteristics of *Strategic Styles and Patterns*



COACHING REPORT TRANSPARENCY GRAPHIC

(Overlay onto "Snowflake" to help illustrate behavioral probabilities)



ADVANCED LEADERSHIP COACHING REPORT

EXPLAINING THE PROFILE

PAGE 7 of Corporate Officers Report

BACKGROUND:

Group members must anticipate Corporate's shifts between styles and patterns. If Corporate's needs can be predicted on a particular issue, exactly the right thing can be done without even asking.

In Corporate's case, the shifts to other styles (LP or HA) and patterns are likely to be infrequent. In a sense, this makes them more unpredictable. Shifts do not happen frequently enough to be anticipated.

ASK:

- ? Do your people recognize when you need to move to exacting analysis/planning (HA) or disciplined, methodical use of the standard approach (LP)?
- ? Are there things you can do to make yourself more transparent in terms of your needs and expectations on issues as they arise?

BACKGROUND FOR QUESTIONS:

There is a probability that Corporate may view transparency as dangerous. Some people view unpredictability as an asset. These questions are meant to call attention to the positive value of being predictable. Efficiency and effectiveness can be improved if the people in the group know when it is safe (for them) to move to one of Corporate's less favored strategies.

BACKGROUND:

The second section shifts the focus to the needs of the people being lead. The discussion here should try to increase awareness to how the alignment between Corporate and the members of the group might be improved.

ASK:

- ? Do the people you lead have a good idea of what is in it for them if they are able to meet your leadership needs more exactly?
- ? Some of your group may be so different from you that they may have problems fully meeting your leadership needs. Is there something you can do to maximize their contribution?

BACKGROUND FOR QUESTION:

It is likely that at least some people in the group being lead have a lower alignment with the leader. You can recommend a strategy of division of labor for these people. For example, put them in an area where they will naturally excel and then leave them alone.



ADVANCED LEADERSHIP COACHING REPORT

EXAMINING VULNERABILITIES

PAGE 8 of Corporate Officers Report

BACKGROUND:

Information-processing preferences give rise to natural vulnerabilities. Speed is purchased at the cost of precision and certainty. The use of tested strategies (LP) automatically precludes entirely novel approaches. Vulnerabilities cannot be avoided, but they can be managed.

A vulnerability is a predisposition. It is only a potential. It becomes a real exposure when a situation or relationship makes it visible. Its severity is determined by how they are managed.

Cycle through the vulnerabilities identified to help Corporate begin to think about this aspect of leadership. The questions below are prompts to help solidify Corporate's focus.



ASK:

FOCUS SHIFTS: Does this posture seem to bother some people more than others?
There may be a tendency to focus on people who share the RI/RS styles and who will welcome focus shifts. The natural assumption is that if some can do it, all can.

SUSTAINED RESULTS: Do you systematically capture the gains that you realize?
It is likely that Corporate will focus on improvements and will probably see the need to permanently capture gains. However, once obtained, interest can be lost and capturing the gains as standard methods may not be a high priority.

DIRECTION: Do some people seem at a loss to understand what you want?
Structured styles (LP/HA) need more explicit direction. Corporate may tend to cut them off before they have what they need.

DELEGATION: Do you consider the abilities of the people when giving an assignment?
It is likely that assignments will be made spontaneously when the idea arises. Probe on whether Corporate is asking too much of the wrong people.

HORIZON: Do you think you give enough time to the operational issues of the group?
Corporate probably sees this as detracting from the ability to "get things done." Examine the kind of gains that might be available if more attention were given to process and procedure codification and standardization.

ROUTINE: How much attention do you give to the day-to-day activities of your group?
Probe on whether performance might be improved if more time were devoted to the routine matters of the group.

ADVANCED LEADERSHIP COACHING REPORT

EXAMINING STRENGTHS

PAGE 9 of Corporate Officers Report

BACKGROUND:

Information-processing preferences give rise to natural strengths as well as vulnerabilities.

Cycle through the strengths identified to help Corporate begin to focus on how these might be magnified.

ASK:

VOLATILE ENVIRONMENTS: Does your current situation use your capacity to handle turbulence?

Is there something that can be done to shift more volatile duties into the area in a way that will reward Corporate? Alternatively, is your ability to handle chaos sufficiently recognized and rewarded?

RESILIENCE: Do you think you take more inappropriate risks than you should?

While Corporate may bounce back quickly, there could still be some damage done. A bit more prudence may allow damage, if any, to be minimized.

CHARISMA: Are there enough challenging tasks to use your ability to inspire?

Applying charisma to minor tasks tends to depreciate it as an asset that will be valued by others.

ATTITUDE: Are there times your positive attitude might be a bit overdone?

Examine how the effects of Corporate's positive attitude might be expanded to even greater effect. A more orchestrated approach of gradually increasing confidence might be more effective. This is not likely to be a major issue but is worth examining.

RANGE: Do you make full use of the versatility that you command?

Are there parts of the job that could be expanded to allow Corporate to make greater use of the scope of abilities commanded? Would this effort be rewarded?

CREATIVITY: Are you, perhaps, too creative? Do you apply it to things that do not need it?

Corporate probably gets ideas on everything. It is likely that creativity will be applied to things that are fine the way they are. The "if it's not broken, don't fix it" principle may apply.

ACTION: Are you bringing the right amount of action to the issues you face?

The fast acting "Changer" pattern (RI/RS) tends to move quickly. However, Corporate also maintains a deliberate "Perfector" pattern (RI/HA) as a secondary option. Examine the forces that cause Corporate to elect a fast versus deliberate posture.



ADVANCED LEADERSHIP COACHING REPORT

LEADING INDIVIDUALS

PAGE 10 of Corporate Officers Report

BACKGROUND:

Ideally you will have the “I Opt” scores for all of the people reporting to Corporate.

If “I Opt” scores are not available, you can attempt to classify the people in the group based on their behavior. This will often be inaccurate but does provide a focus for discussing leadership strategies.

If there is no group currently reporting to Corporate, use the people with whom Corporate is associated as a focus of discussion.



DISCUSS:

Let's cycle through all of the people in your group and see how they fit into the framework.

Background:

Use the “Snowflake” pass-out to identify their tendencies. Keep track of who is assigned to each category for use in the next section.

ADVANCED LEADERSHIP COACHING REPORT

LEADING GROUPS

PAGE 11 of Corporate Officers Report

BACKGROUND:

Ideally you will have a TeamAnalysis™ for all of the people reporting to Corporate.

If a TeamAnalysis™ is not available, you can attempt to classify the group by counting the number of people you classified in each category in the previous exercise. The result will be inaccurate but it can still provide a focus for a group assessment.

The purpose of this section is to discuss the effects of Corporate on the group as a whole. Things like policies, standards, and cultural norms affect the entire group simultaneously.



ASK:

Do you feel that you really get across to more than the percent (see circle) of people in the average group?

Background:

Corporate probably thinks that new ideas and experimental action are understood and valued by everyone. It is unlikely that they are seen as a potential source of stress and discomfort. Corporate's general posture of avoiding operational detail is also likely to seem to be the "right" thing to do. It is unlikely that Corporate will recognize that some people (LP) value and like detail and specificity.

When we classified the people, the group as a whole seemed to register highest on the (select one: RS, LP, HA, RI) category.

- ? How well do you think your approach matches the needs of the group as specified in the categories cited on Page 11 of the Advanced Leadership Report?
- ? How do you think the people whose style lies outside the dominant group would respond if you fully satisfied the dominant style of your group?
- ? What kind of mix of leadership behaviors do you think would optimize the group as a whole?

ADVANCED LEADERSHIP COACHING REPORT

FOLLOWERSHIP

PAGE 12 and 13 of Corporate Officers Report

BACKGROUND:

This section changes the focus from down to up the organization. The purpose of this section is to discuss the followership effects of Corporate's strategy.

ASK:

- ? Where do you think you are located on the "Loose Cannon—Total Compliance" continuum?
- ? Where is your ideal position from your leader's perspective?

BACKGROUND FOR QUESTIONS:

It is likely that Corporate will tend toward the Loose Cannon end of the continuum. The contributions made from that position will stand out vividly. The cost to Corporate's leader will tend to be obscured. In other words, Corporate may not see the leader's need for greater coordination or highly predictable behavior.

ASK:

- ? Do you think your leader views you as a bit "scattered?" Could you gain anything by becoming a bit more focused on fewer things?
- ? Do you think your leader sees you as lacking a bit in terms of establishing routine ways of doing things?
- ? Could focusing more on items of interest to your leader (and a bit less on self-initiated items) pay dividends to both you and your group?
- ? Do you think your leader sees you as sufficiently responsive across the board, or is your responsiveness localized to specific issues where it is clearly called for by the situation?

BACKGROUND FOR QUESTIONS:

These questions are drawn from the bullets on Page 13. These are only tendencies. Any actual exposure depends heavily on the leader's strategic style. However, they do provide a means to begin to explore the relationship to the leader. Encourage the addition of items that Corporate views as an exposure.



ADVANCED LEADERSHIP COACHING REPORT

WRAP-UP

Corporate Officers Report

BACKGROUND:

Using the notes taken from the coaching conversations, rough draft a bullet point summary of actions that Corporate might take to improve. Focus on the points where you seem to have reached a consensus that there was an exposure to be avoided or an opportunity to be gained.

Make the draft brief. Corporate's strategy is to focus on the central aspects of an issue. Cover major justifications, elaborations, or explanations but not extensively. Creating a long document may tend to discourage Corporate from actually using the document. Also, be certain to point out that this is a draft and that it requires Corporate's participation to make it an effective tool.

GENERAL STRUCTURE OF DRAFT:

Corporate Officers LEADERSHIP ENHANCEMENT PLAN

New Themes to Establish (Page 5)

Existing Themes to Modify (Page 5)

Actions to Limit Vulnerabilities (Page 8)

Actions to Enhance Strengths (Page 9)

Individual Leadership Initiatives by Person (Page 10)

Group Leadership Initiatives (Page 11)

Followership Initiatives (Page 12 and 13)

ON-GOING SUPPORT (IF APPLICABLE):

- ? Review and finalize the Leadership Enhancement Plan to the point of firm agreement.
- ? Establish a protocol to continue coaching based on the initiatives agreed to and expressed in the Leadership Enhancement Plan.