

# Katie Leadership Coaching



*Katie School of Insurance  
Illinois State University*

## Why Coaching?

- ▶ **In knowledge-industry companies, the only sustainable competitive advantage is in developing “human capital”**
- ▶ **The failure rate among corporate executives in the past 10 years has been at least 50% (DeVries 1992)**
- ▶ **As a result, companies must get the best returns possible on their investment in leadership**
- ▶ **Traditional classroom leadership programs do not always change behaviors**

## Why Katie School Leadership Coaching?

- ▶ **All Katie School coaches are “Business Leadership” coaches that understand business issues and strategies (in contrast to psychologist coaches)**
- ▶ **All Katie School coaches are certified in Character/Drivers/Rewards (CDR) assessments**
- ▶ **All Katie School coaches have support and access to Katie School resources to help with industry context**

# CDR 3D Assessment Tool

## ▶ Inherent Leader Traits

- Character – Acumen, Inherent Differences, Fitness, Gifts & Gaps
- Risks – Problematic Behaviors, Derailment
- Drivers & Rewards – Accountability, Reinforcement, Fulfillment, Culture, Loyalty

## Advantages of the CDR 3D Assessment Suite

- ▶ **Available in five languages**
- ▶ **Based on science, statistical validity, and strict research standards**
- ▶ **EEO/ADA neutral—no adverse impact for minorities, females, or the disabled**
- ▶ **Diagnostic and Configural Capabilities**

## Companies use this tool for:

### ► Individuals

- Executive/Management performance improvement
- Career development and performance coaching
  - 3D-CDR tells “strengths and weaknesses”

## Companies use this tool for:

### ▶ Teams

- Team selection
- Team building
- Interventions
- Training
- Aligning teams with strategic initiatives

## Companies use this tool for:

### ► Organizational Issues

- Leadership and staff selection
  - Internal & external -- all positions & all levels.
- Re-staffing projects—mergers and acquisitions
- Identification of hidden talent and retraining
- Succession planning—building the “bench strength”



# CDR Character Assessment

## ADJUSTMENT

Self assured, steady under pressure, relaxed, - or -  
Self-evaluative, edgy, intense performer, ...

## SOCIABILITY

Extraverted, socially energized, - or -  
Socially remote, reserved, an avid listener, ...

## PRUDENCE

Dependable, self-controlled, conscientious, - or -  
Risk taking, adaptable, not detailed, ...

## LEARNING APPROACH

Academically inclined, achievement driven, - or -  
Content learning with “hands on” approach, ...

## LEADERSHIP ENERGY

Take charge, upward mobility driven, - or -  
An individual contributor, modest ...

## INTERPERSONAL SENSITIVITY

Warm, caring, sensitive to others' needs, - or -  
Task focused, hard-nosed, direct, ...

## INQUISITIVE

Adventurous, curious, imaginative, - or -  
Practical, process focused, methodical, ...

# Example: Leadership Character Assessment's Definitions & Performance Implications

Each Primary Character Scale is described to the "Subscale" level providing a very insightful or robust leadership development assessment report.

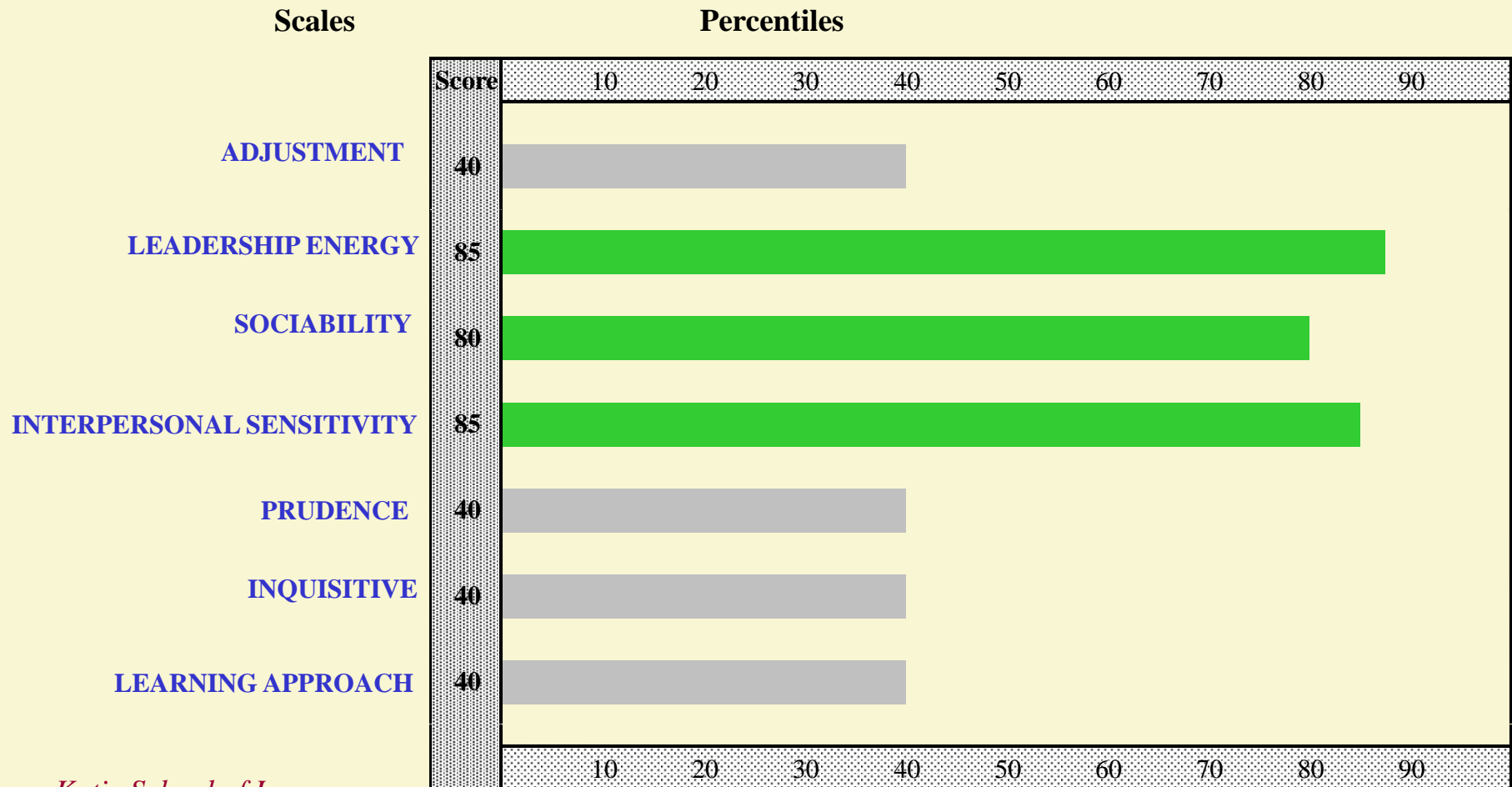
**Adjustment** – measures the extent to which a leader is calm, self-assured and steady under pressure versus being self-critical, edgy, and an intense performer.

CDR Subscale Titles for **Adjustment** include the following tendencies:

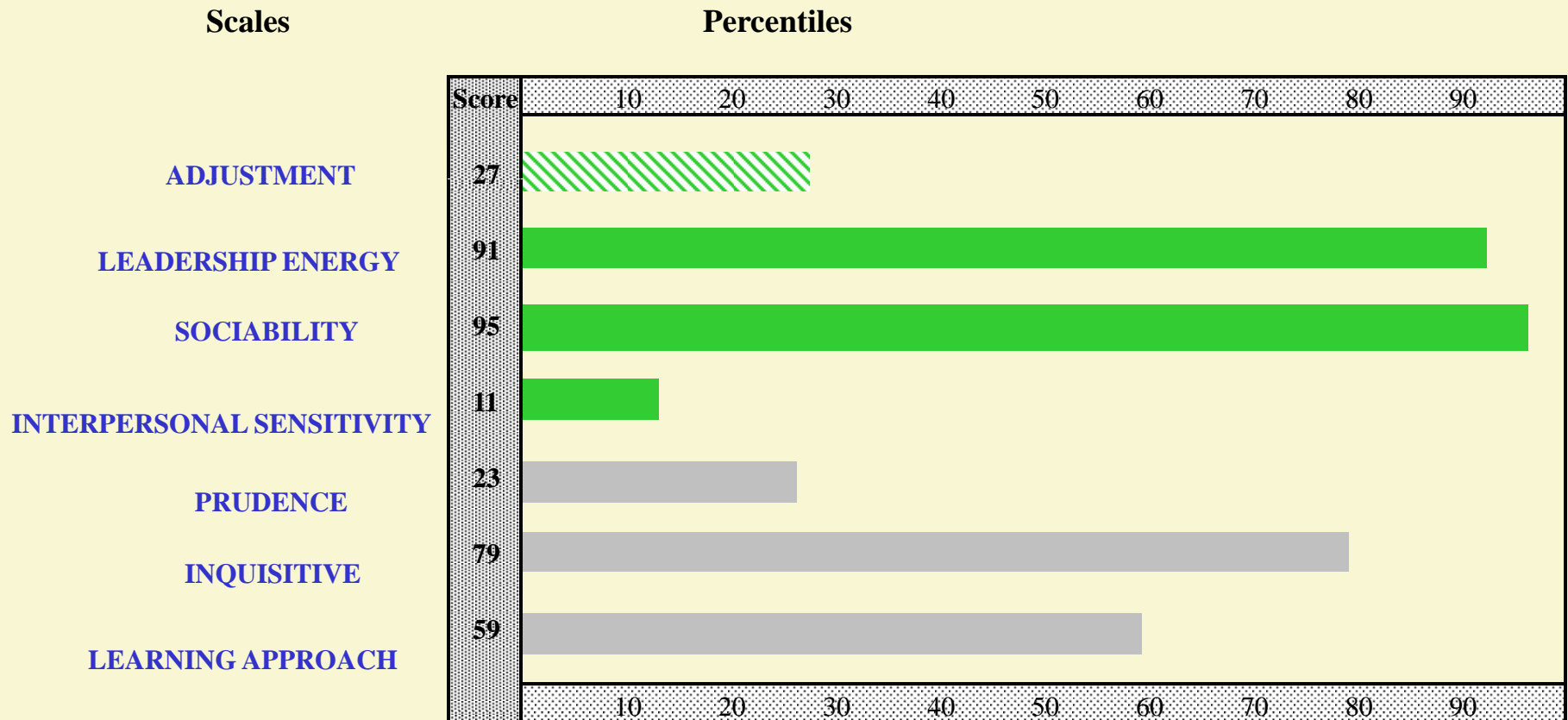
- ⇒ easygoing
- ⇒ not anxious
- ⇒ no regret
- ⇒ calmness
- ⇒ even tempered
- ⇒ stress stamina,
- ⇒ trusting, and
- ⇒ childhood authority relationships.

# Character Assessment

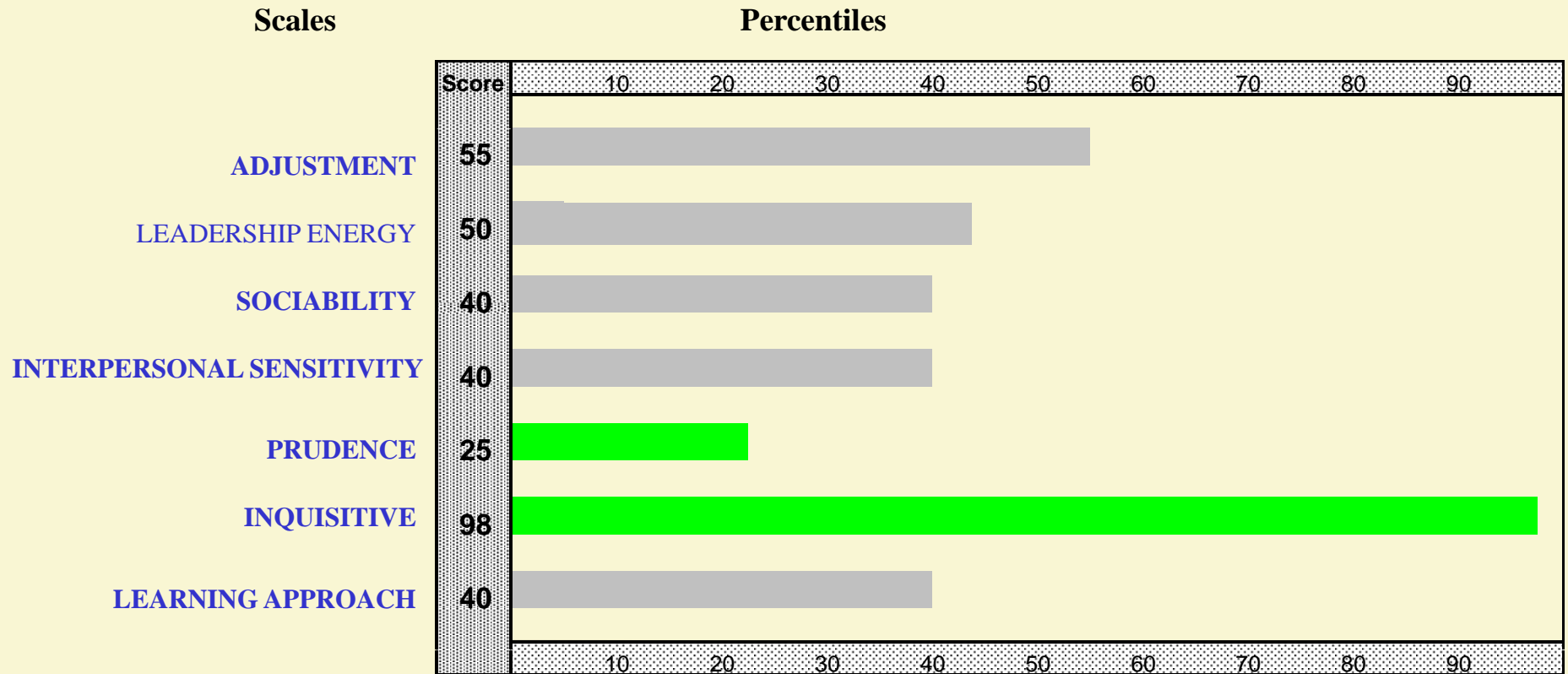
## Interpersonally Skilled Profile



## Character Assessment “Tough & No Nonsense” Sales Leader Profile



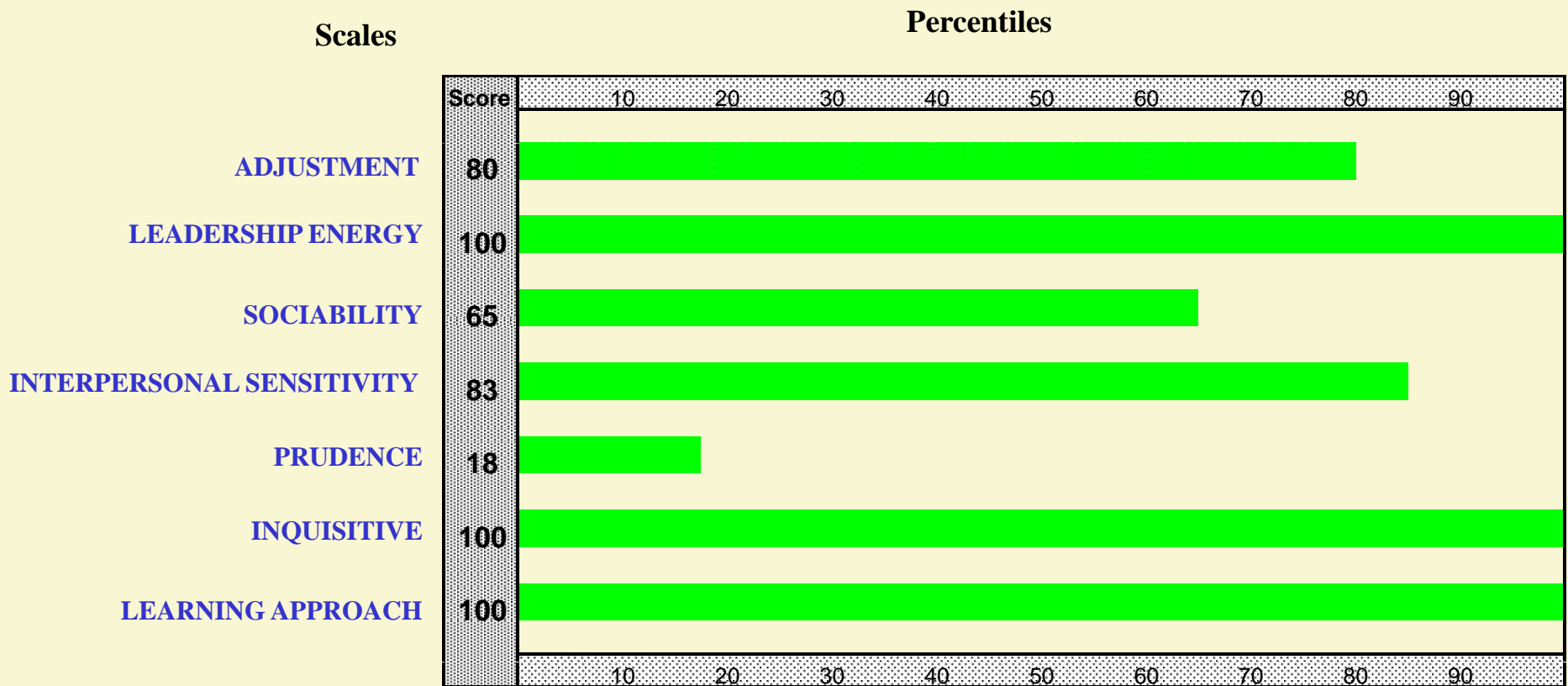
# Character Assessment Creative Profile



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# Character Assessment

## Visionary Leader Profile



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# Assessing An Individual's Drivers & Rewards

## Revealing a person's

- lifestyle interests & fulfilling activities
- beliefs
- occupational preferences
- human interaction  
“wants” *and*
- aversions.

## And, measures needs:

- types of rewards & recognition desired
- optimal work environment & culture fit, and
- the types of work and tasks that are most enriching and valued.

# Drivers & Rewards

## *Facet Titles*

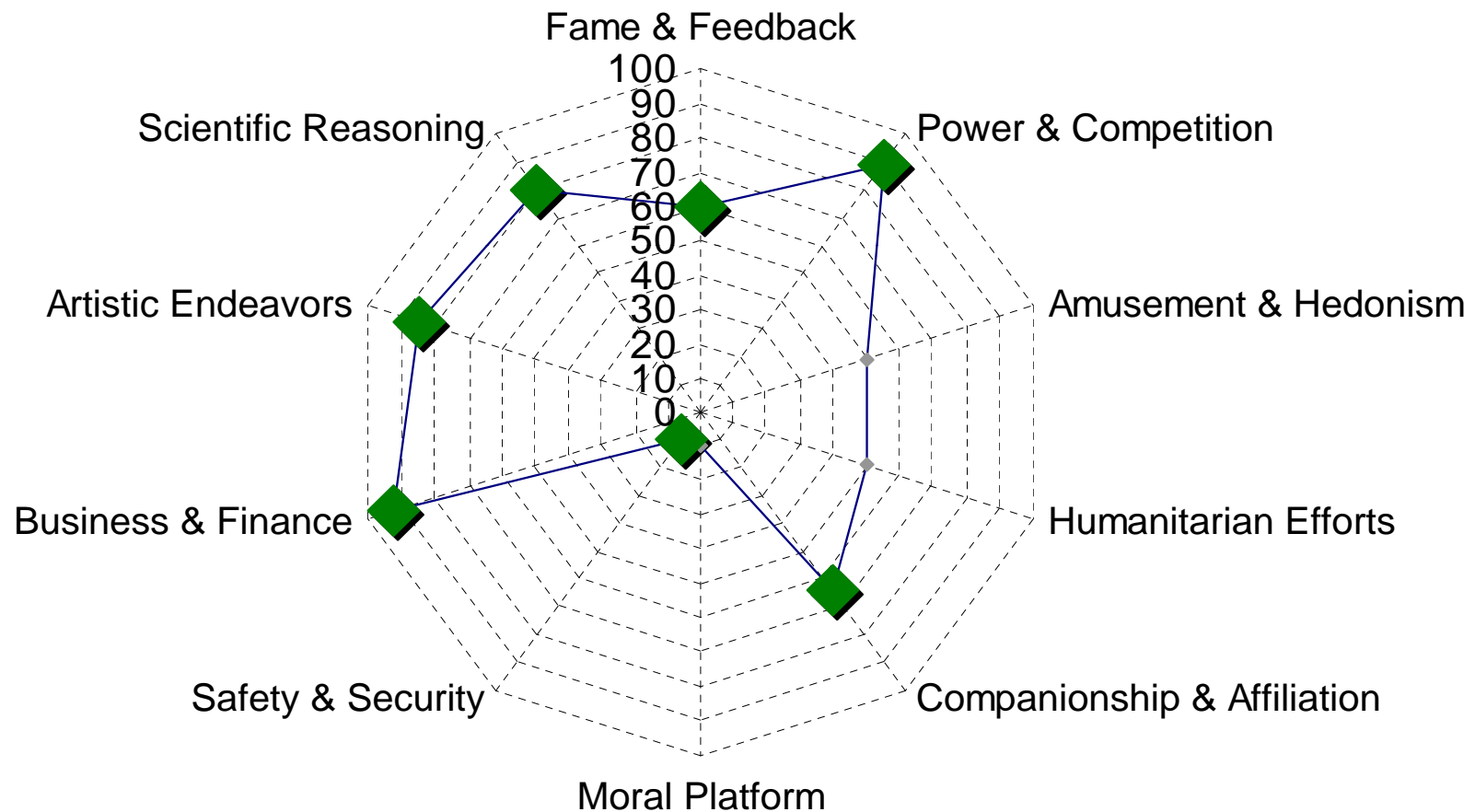
- **Fame & Feedback**
- **Power & Competition**
- **Amusement &  
Hedonism**
- **Humanitarian Efforts**
- **Companionship &  
Affiliation**

- **Moral Platform**
- **Safety & Security**
- **Business & Finance**
- **Artistic Endeavors**
- **Scientific Reasoning**



# Drivers & Rewards Assessment

*Describe this Leader's Motivational Drivers*



## Executive Risks

*(that undermine effectiveness & can result in derailment)*

- False Advocate
- Worrier
- Cynic
- Rule Breaker
- Perfectionist
- Egotist
- Pleaser
- Hyper Moody
- Detached
- Upstager
- Eccentric

## Risk Assessment Clusters – Traits that Commonly “*Hang Together*”

*Hyper-Moody*

*Cynic*

*Worrier*

*Detached*

*False Advocate*

### Moving Away from People

withdrawing oneself from others to  
achieve self-sufficiency and protection  
from interpersonal confrontations

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*Egotist*

*Rule Breaker*

*Upstager*

*Eccentric*

### Moving Against People

using aggressiveness and hostility to  
achieve power and personal admiration

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*Perfectionist*

*Pleaser*

### Moving Toward People

going along with people in order to  
receive approval and affection

## Ground Rules

### ▶ Coaches will:

- Hold personal results in confidence
- Hold our conversations in confidence
- Give feedback that is constructive and positive
- Give feedback with client best interests at heart

## Ground Rules

### ▶ We ask our clients to

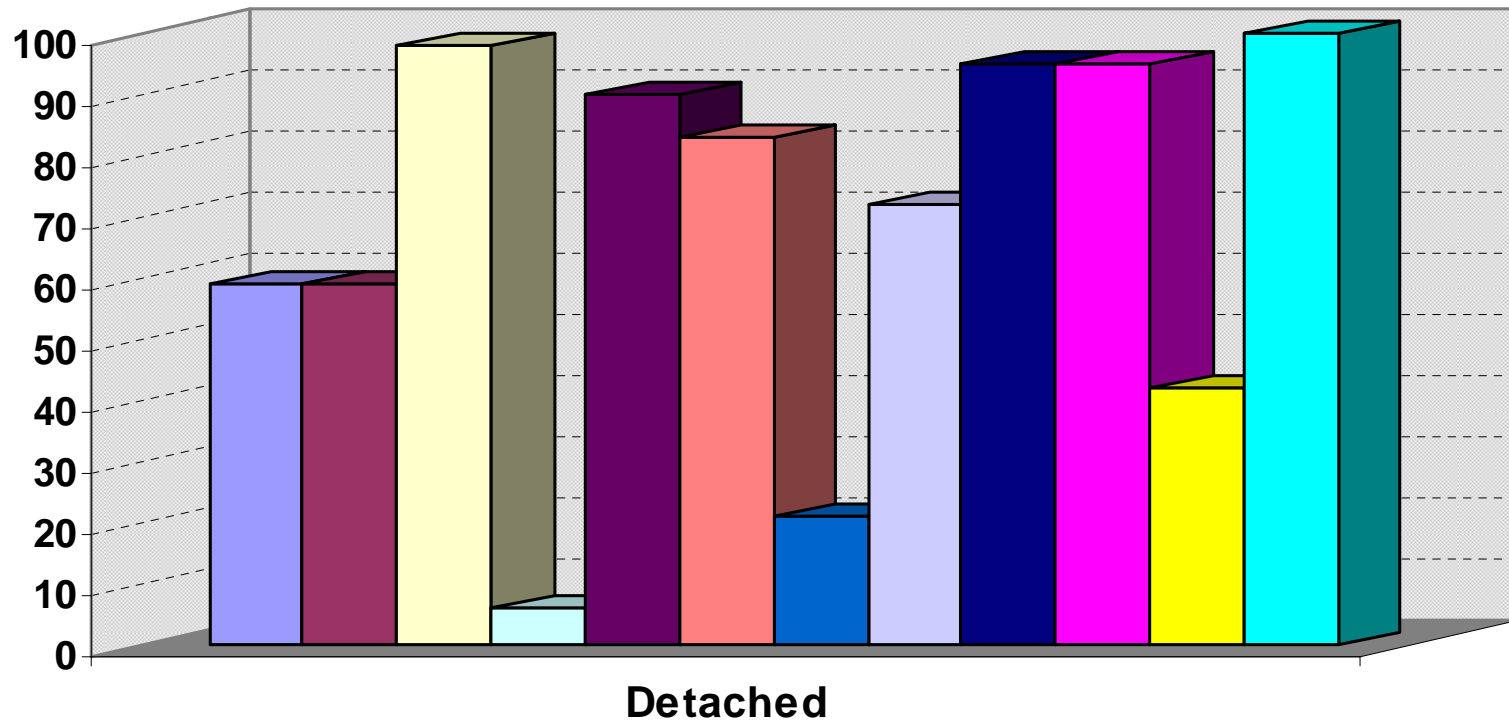
- Ask questions freely
- Challenge any results that don't make sense to you
- Share openly, knowing that our conversation is confidential and that candid discussions lead to better understanding of feedback
- Enjoy your results and use them as you go forward.

# Team Coaching

- ▶ **Following individual assessments team coaching may be indicated:**
  - Identify issues of team as a whole
  - Explain how this will affect decision-making
  - Be customized to help deal with development issues of team to enable them perform at higher level. (See following examples)

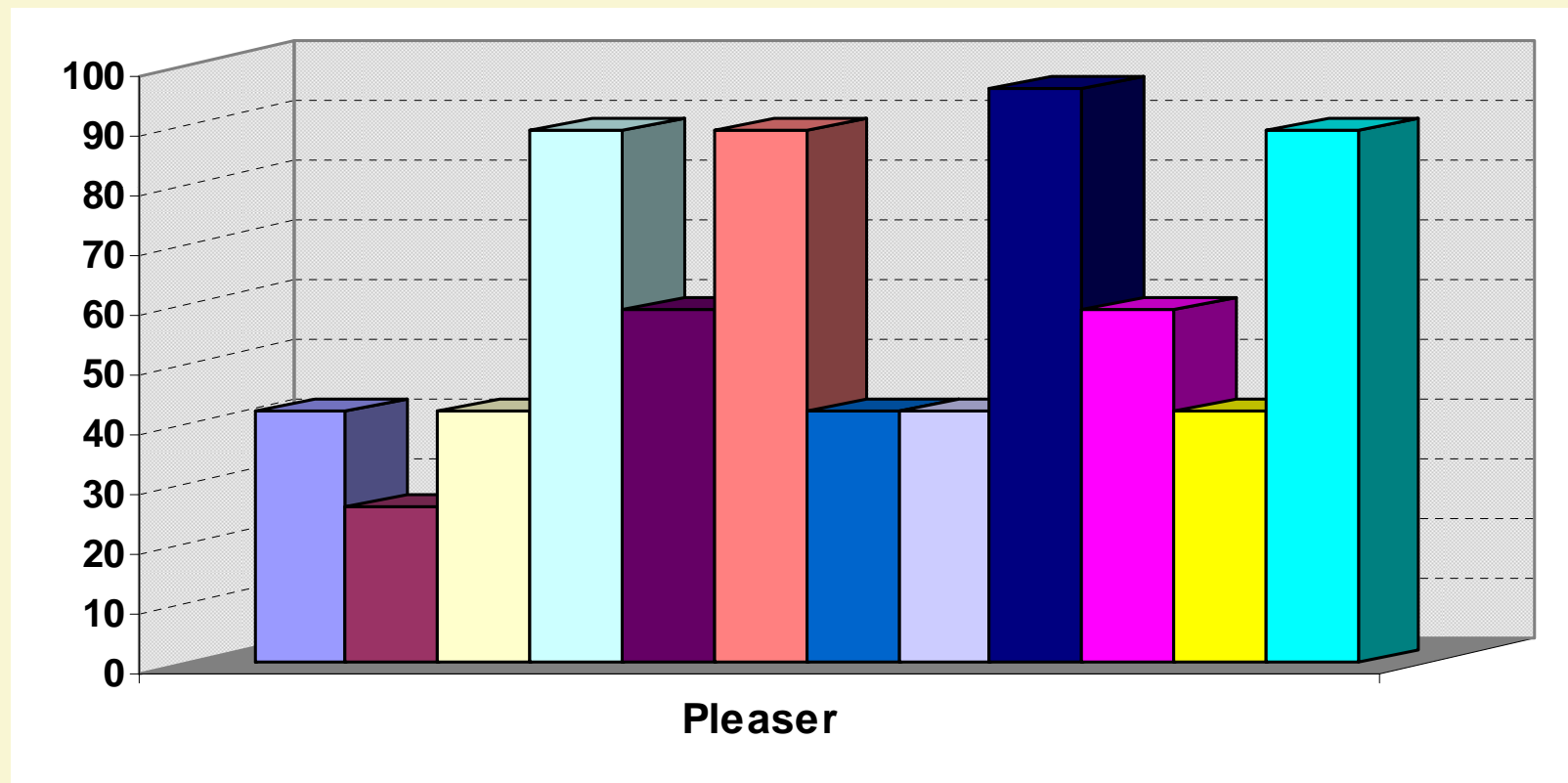
## Use of Actual Team Results

This team results indicate that several 9 members take shelter and become invisible in times of stress and may avoid conflict. A workshop could be conducted to help with this.



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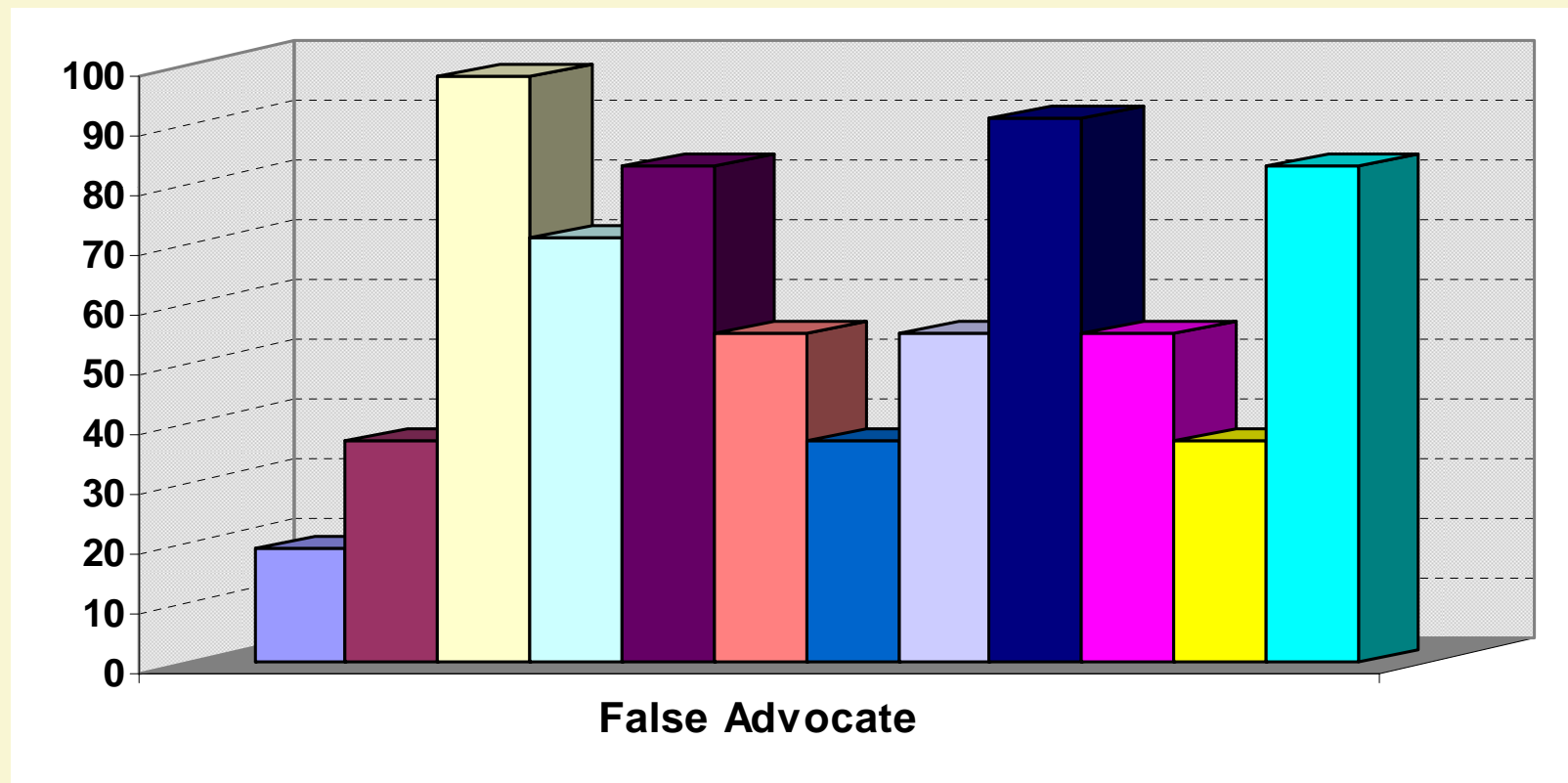
This team results indicates high scores on “Pleaser” which may make movement on underperformance difficult and allow “conventional wisdom” to hold too much sway over decisions.





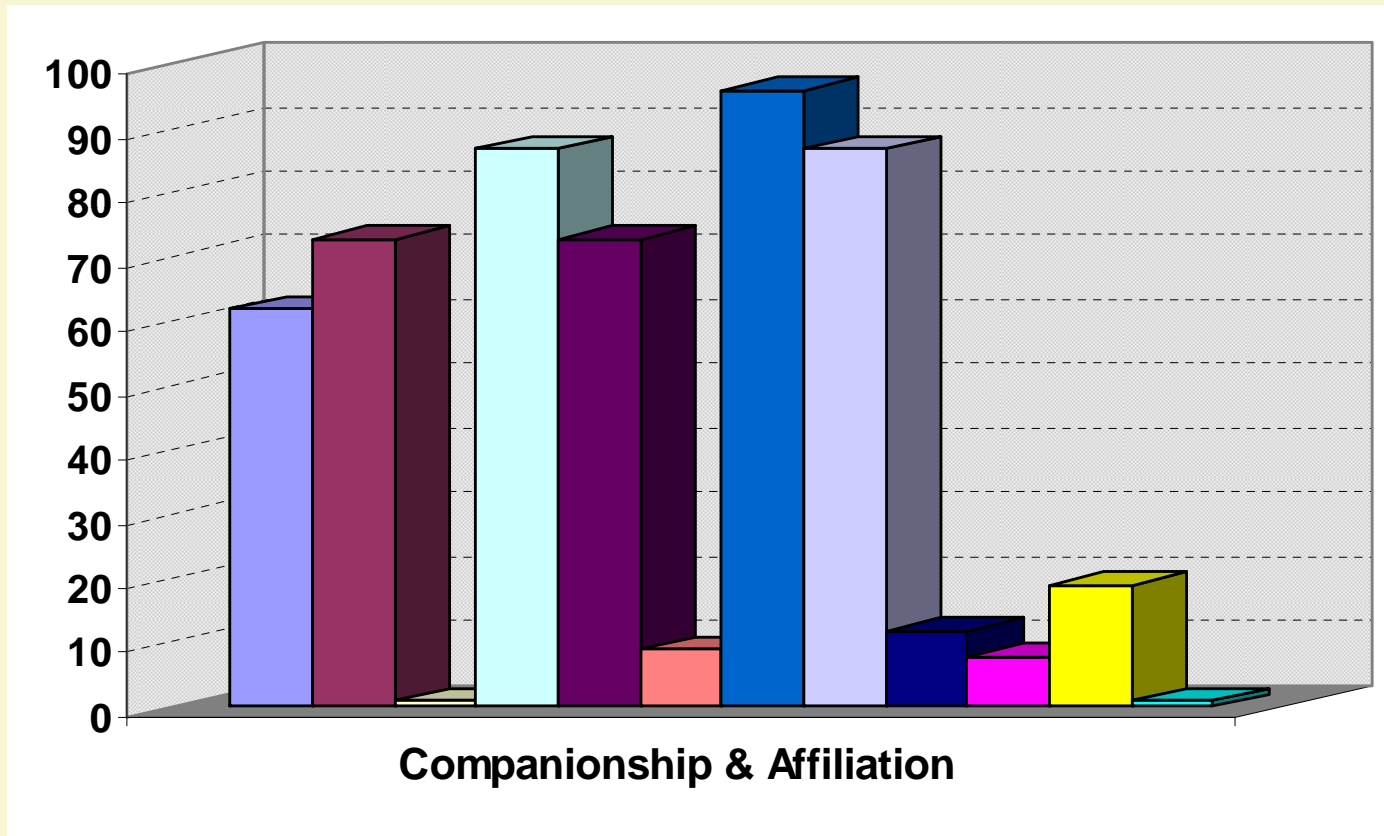
## Katie Leadership Coaching

This team result show high scores on “False Advocate” means that a lot of people are nodding “yes” to things they would really like to say “no” .



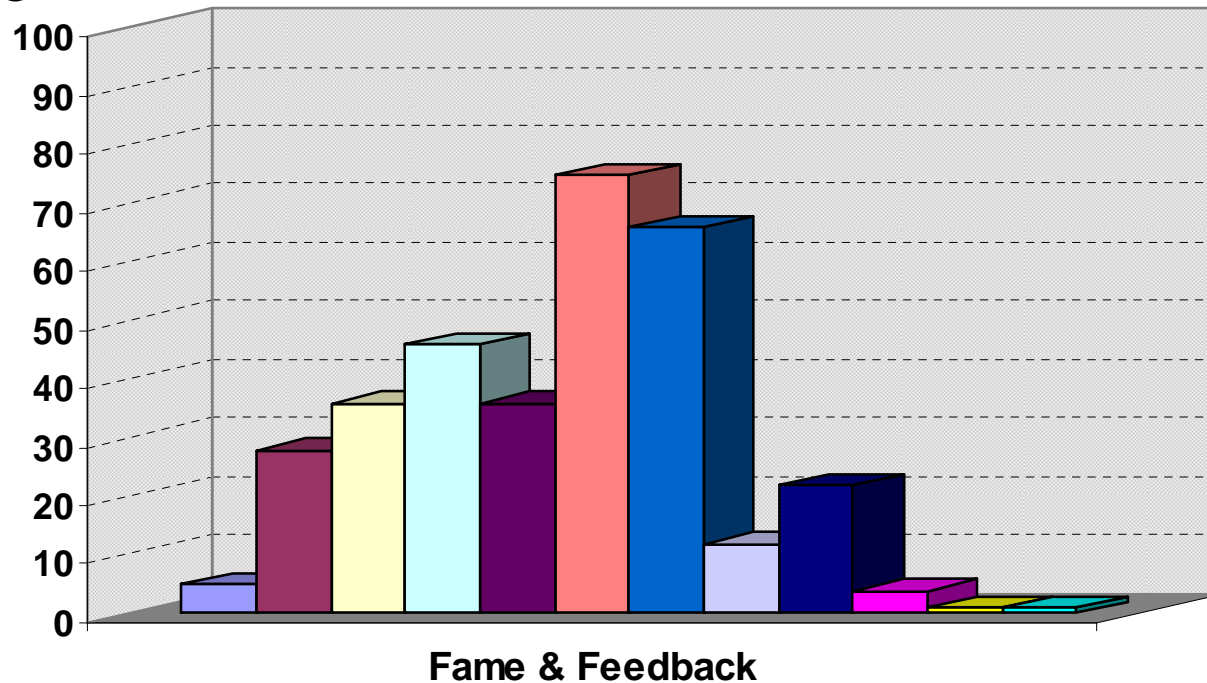
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This team has a bimodal distribution on Companionship as a driver: Very high for half the team yet nearly non-existent for other half.



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This a fairly low profile for management team for “fame and feedback” as a driver. It actually is an aversion for several members of this team. Consequently, many of the leaders are avoiding the spotlight. Need them to understand the impact of this on the organization.



# What is the Resource Commitment?

## ▶ **The Individual Assessment and Coaching includes:**

- 3 assessments (character, risks, and drivers)
- In-person feedback and coaching based on assessments
- Individualized Leadership Development Plan
- Follow-up contact at 90 and 180 days

# Questions

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