



waldron
EXECUTIVE COACHING SERVICES



EXECUTIVE COACHING OVERVIEW

ABOUT WALDRON

For over 30 years, Waldron CPI has helped organizations and individuals realize their full potential and sharpen their competitive edge. Committed to excellence and achieving desired results, we tailor flexible solutions for our corporate and social-sector client organizations and for their key leaders. In each of our market geographies, Waldron CPI coaches take the time to understand and appreciate the complex environments in which executives operate; we work with clients to co-create engagement plans tailored to both our clients' and their sponsoring employers' specific objectives. More broadly, as equity owners of Career Partners International (CPI), Waldron CPI offers its services worldwide in over 200 locations. Through this global footprint we are able to deliver our consultancy services consistently, with common methodology and high standards through top-tier coaches and consultants while employing state-of-the-art proprietary infrastructure and project tracking technology.

PRIMARY EXECUTIVE COACHING APPLICATIONS

HIGH-POTENTIAL COACHING

Created to further enhance the leadership skills and successes of your most promising upcoming leaders, this program focuses on the specific needs of each individual. The tailored program identifies key areas for personal leadership improvement by using background interviews of those working closest to him or her, models of effective leadership and a practical, fact-based approach designed to be put immediately into action. The follow-up aspect of this program allows for on-going private coaching and fine-tuning.

TARGETED PERFORMANCE COACHING

Targeted Performance Coaching focuses on improving an executive's performance by teaching new behavioral, leadership or managerial skills to modify specific behaviors that may be impeding his or her greater success within an organization. Executives are selected to engage in this program because they play key roles and bring crucial knowledge or skills to their organization. Senior management or a board believes a coach could assist the executive to more quickly reach their full potential or overcome specific leadership barriers.

In a direct yet supportive manner, the coach assists the executive to reflect upon actual on-the-job performance challenges. The coach helps build personal strategies that better meet those challenges by facilitating specific behavioral and mind-set changes and improved communication methods.



NEW LEADER COACHING

In our high stakes business world, boards of directors and senior management demand immediate and effective results from newly appointed CEOs and other key executives. Leaders who are either new to an organization or who take on new responsibilities know their mandate requires making all the right moves, making them quickly and definitively. We can support the success of leaders stretching into roles of greater scope and scale by helping them determine the leadership capabilities which they need to focus on in their new roles, and how they can amplify their leadership to best support the business strategy.

Waldron CPI's New Leader Coaching provides a seasoned coach to help highly visible new leaders clearly define their mission, gain buy-in, build necessary relationships, then implement action plans. Time is spent on real-life, immediately applicable game plans. New leaders, ranging from manager through C-level, enjoy the ability to speak openly, frankly, and confidentially with their executive coach and gain the unbiased perspective of an independent senior leader as they chart their course of action.

LEADERSHIP TEAM COACHING

A group of individuals does not function as a team without significant effort and management. An effective leadership team evolves through clarity of purpose and establishes mutual expectations and accountability for reaching goals of strategic importance. Team dynamics will either support or hinder the accomplishment of these goals.

Waldron CPI is able to assist your organization in improving leadership team function at any level. Whether focusing on enhancing relationships, achieving collective results or helping a newly formed team define its mandate, it is critical that all team members be able to articulate an understanding of why the team exists, what is expected of its members individually and collectively, and what results are to be delivered.



EXECUTIVE COACHING PROCESS & FRAMEWORK

Our engagements are designed to target both the client organizations' and the individual executives' specific needs. While the circumstances vary from engagement to engagement, the following provides a basic outline of our 6-phase process and framework.

STAGE 1 CONTRACTING & GOAL SETTING

Purpose - Building the foundation that will support the success of the coaching engagement

Process - Stakeholder discussions to determine: Objectives & expectations Roles & responsibilities

Outcomes - Clear and realistic expectations regarding the coaching process and action plans

STAGE 2 ASSESSMENT & FEEDBACK

Purpose - Assessing leadership impact, strengths, weaknesses, and gaps to determine areas of focus

Process - Assessments are administered; feedback provided to help coachee interpret results

Outcomes - A current profile is developed and a foundation is established for coachee's roadmap for success

STAGE 3 DEVELOPMENT PLANNING

Purpose - Detailed action plan agreed to by all parties to increase overall leadership effectiveness

Process - Process for development is mapped, including benchmarks to measure progress

Outcomes - A customized development plan

STAGE 4 STAKEHOLDER ENGAGEMENT

Purpose - Gaining commitment and support from stakeholders

Process - Providing feedback to stakeholders, gaining agreement on developmental priorities

Outcomes - Agreement on the plan, measures, and follow-up; development of important mentoring relationships

STAGE 5 IMPLEMENTATION & ONGOING PLAN

Purpose - Successfully implement development plan by practicing new behaviors and troubleshooting obstacles

Process - One on one coaching between executive and coach

Outcomes - Measured progress in selected developmental areas

STAGE 6 EVALUATE & SUSTAIN

Purpose - Review goals and measure outcomes; sustain progress and strengthen key relationships

Process - Outcomes can be measured through follow-up interviews or 360 assessment

Outcomes - An action plan for ongoing career development assuring continuing results



RIGOR, VISIBILITY, REPORTING AND ACCOUNTABILITY

We believe that institutional buyers and sponsors should expect to experience a number of key areas of alignment, rigor and accountability when working with a high quality executive coaching organization. Waldron CPI has built our practice on these principles:

- We operate under a set of shared values for executive development with our clients.
- We are outcomes-focused. Early in all individual client engagements, coaches gain agreement among the client, the sponsor (typically the client's direct manager) and themselves on the outcomes the client is seeking, and on the measures to determine progress.
- We align desired outcomes with the individual client's financial, operating, and human relationship goals. Coaching is done to enable achievement of specific and measurable performance management targets.
- We take full responsibility for managing the portfolio of individual coaching engagements through a single point of contact for account leadership and project management.
- We apply rigorous coach selection criteria to the qualification and deployment of our coaches.
- We follow a definitive and uniform coaching framework across all individual executive client engagements, no matter where they are located. While individual coaches will have a variety of styles and personalities that match your range of executives' styles, coaches proceed following a common and agreed upon set of steps through which they guide their clients.
- We agree with you in advance on a system of milestone reporting and outcomes measurement so that you can track the progress of your employees' engagements. Waldron CPI has the ability to offer you a customized, online "dashboard" through which you can monitor all coaching engagements throughout your organization; this can be loaded with your logos and trademarks for a private label feel.

WALDRON CPI WELCOMES AN OPPORTUNITY TO PARTNER WITH YOU TO DEVELOP A CUSTOMIZED APPROACH THAT ENHANCES THE EFFECTIVENESS OF TEAMS THAT FURTHER THE WORK OF YOUR ENTERPRISE.



FREQUENTLY ASKED QUESTIONS

WHAT IS YOUR COACHING PHILOSOPHY?

We believe that contemporary leaders who will excel in this era are those who know themselves, are driven by a desire to achieve, accept high accountability, and are sensitive to the changes that are occurring in their industry, at their workplace, and with their competition. Such success calls for leaders who are willing to examine their strengths and weaknesses, who will work to hone their skills for new challenges, and who can honestly address, with the guidance of a senior coach, what they can do to improve.

AMONG TOP MANAGEMENT, ALMOST EVERYONE IS “SMART.” WHAT DIFFERENTIATES TOP FROM AVERAGE PERFORMERS IS THE EXTENT TO WHICH LEADERS ARE SELF-AWARE AND CAN DEVELOP EFFECTIVE RELATIONSHIPS, ARE ABLE TO INFLUENCE OTHERS, UNDERSTAND WHAT’S EXPECTED OF THEM, AND ARE ABLE TO WORK FLEXIBLY AND CROSS-FUNCTIONALLY.

A number of assumptions guide our approach to coaching leaders at all levels of the organization:

- All development must begin by understanding the business results you want to achieve. When you fail to link development to key business issues, you’re likely to improve the person without improving his/her impact on the business.
- Assessment is a cornerstone of the development process. Thorough assessment provides a critical view of an executive’s current strengths, challenges and blind spots, which enables us to chart a solid course for future growth and development. We believe in customizing each assessment that we do, making sure we find tools that measure the most useful information, given the needs and context each individual brings to the engagement.
- There is no single leadership style that is “best” in all situations. Leadership exists to achieve a specific outcome within a specific context and with a particular group of people. You can’t determine the most effective leadership profile until you know the business results you’re trying to achieve, the environment, and the context and people with whom you are working.
- Understanding yourself and the impact you have on others is absolutely critical to being an effective leader. Leadership does not exist in a vacuum... No one can afford to have large blind spots or be resistant to learning about the impact they have on others. Leaders must have insight about their strengths and weaknesses, reflect upon their intentions, manage stress effectively, and hone their skills to get required business results. By working with an executive coach, leaders can accomplish this.



WHAT TRAINING HAVE YOUR COACHES RECEIVED?

Our coaches have engaged in a variety of training and education that is detailed in their individual biographies. We thoroughly evaluate coaches through a rigorous process that includes multiple coach interviews, interviews with individuals they have coached, and interviews with the executive sponsors of their coaching engagements. We continue to survey our coaches' individual and institutional clients and hold regular review sessions with them.

Waldron CPI has delineated four core coaching competency areas, six technical skill areas, and the following personal characteristics as criteria for coach selection:

CORE COACHING COMPETENCIES

- o Psychological knowledge
- o Business acumen
- o Organizational knowledge
- o Coaching practices

COACHING TECHNOLOGY & SKILLS

- o Building & Maintaining coaching relationships
- o Contracting
- o Assessment
- o Development Planning
- o Facilitating Development and Change
- o Ending Formal Coaching - disengagement

PERSONAL CHARACTERISTICS

- o Mature, appropriate self-confidence
- o Conflict Style
- o Positive Energy
- o Assertiveness
- o Interpersonal Sensitivity
- o Openness and Flexibility
- o Listening skills
- o Goal Orientation
- o Partnering and Influence
- o Continuous Learning and Development
- o Integrity and Character

WHAT BEHAVIORAL ASSESSMENTS, PROFILES, 360s, ETC. DO YOU USE?

Waldron CPI has a large toolkit of development assessments that we use as part of a coaching process including: Birkman Method, MRG-LEA, Myers-Briggs, Firo-B, DISC, Strong Inventory, Assess Systems, The Leadership Circle, Hogan, and others. We believe the value of assessments lie in their ability to efficiently and productively facilitate the most relevant conversations between the coach and client.

To gain input into a leader's strengths and development needs as part of a coaching process, Waldron CPI employs both qualitative (interview) and quantitative (survey) assessments. We often leverage existing assessment data from internal 360 processes, or construct the framework and apply Waldron's proprietary 360 process.



HOW DO YOU MEASURE EXECUTIVE COACHING & LEADERSHIP DEVELOPMENT SUCCESS?

Where possible, we like to bring the individual's personal performance goals into the conversation and evaluate whether any of the client's operating metrics can be used as specific metrics aligning with our success. Other success measurement and reporting methods include:

- **Post 360 Assessment** - At the completion of longer engagements, the coach will gain input from some or all of the individuals who gave input on the leader's strengths and development needs at the beginning of the coaching engagement. This input may take the form of a "Focus 360" (a follow-on quantitative multi-rater assessment that focuses specifically on the behaviors and skills the leader included in a development) or the input may be gathered through a series of short follow-up interviews. The post-assessment provides important information for the leader regarding behavior changes that are noticeable among people the leader works with on a regular basis.
- **Quality Surveys** - For each coaching engagement, we will ask the leader and his/her executive sponsor to provide feedback about their experience working with the coach and their perceptions of the coaching's effectiveness. Depending on the length of the engagement, surveys will be administered at the mid-point and at the completion of the coaching engagement. Surveys can be administered through our online dashboard and results will be consolidated and included in Quarterly Reviews.
- **Quarterly Reviews** - Waldron CPI suggests that we meet with engagement sponsors on a quarterly basis to review: (1) the status of coaching programs that are beginning, in process, and ending, and; (2) quality survey results. Other topics may include strategy or culture issues that impact coaching, (to ensure we stay aligned with overall company objectives), feedback on what Waldron CPI can continue to improve, and any other specific issues that arise.

HOW MANY SENIOR EXECUTIVE LEVEL INDIVIDUALS HAVE YOU COACHED?

Through our multiple coaches, Waldron CPI has coached hundreds of senior executives.

HOW FLEXIBLE ARE YOU WITH REGARD TO CUSTOMIZING THE STRUCTURE TO MEET BOTH INDIVIDUAL AND ORGANIZATIONAL NEEDS?

Flexibility and agility are at the core of the Waldron CPI value proposition and coaching experience. While we leverage a consistently applied framework, systems, and processes across coaching engagements and coaches to help ensure high quality service delivery, our business model is based on the notion that we must be completely flexible in tailoring solutions to meet our individual clients' needs.





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Santa Clara
Torrance
Westlake Village
Woodland Hills

Colorado
Denver

Connecticut
Hartford
Norwalk

Delaware
Wilmington

District of Columbia

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Fort Lauderdale
Jacksonville

Florida (cont.)
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Tampa
West Palm Beach

Georgia
Atlanta

Hawaii
Honolulu

Idaho
Boise

Illinois
Chicago
Deerfield
Oak Brook

Indiana
Indianapolis

Iowa
Cedar Rapids
Davenport
West Des Moines

Kansas
Kansas City / Overland Park

Maryland
Baltimore
Bethesda
Rockville / DC Area

Massachusetts
Boston

Massachusetts (cont.)
Burlington
Southborough

Michigan
Ann Arbor
Detroit

Minnesota
Minneapolis

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Kansas City
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Omaha

Nevada
Las Vegas

New Hampshire
Nashua

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Parsippany
Princeton

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Albany
Buffalo
New York
Rochester
Syracuse

North Carolina
Charlotte
Kinston
Raleigh
Sanford
Winston-Salem

Ohio
Cincinnati
Cleveland

Oklahoma
Oklahoma City
Tulsa

Oregon
Portland

Pennsylvania
Allentown
Blue Bell
Harrisburg
Lancaster
Philadelphia
Pittsburgh

Puerto Rico
San Juan

Rhode Island
Providence

South Carolina
Columbia

Tennessee
Chattanooga
Knoxville

Tennessee (cont.)
Memphis
Nashville

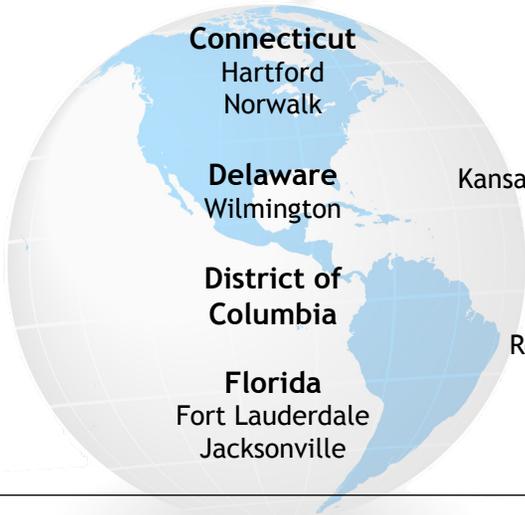
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As the consulting partner strategic leaders choose to help attract, engage, and inspire effective leaders, Waldron provides a unique combination of executive search, leadership development and career transition services across sectors and industries. Our passion is helping people and organizations realize their full potential and increase their impact.

For more information about how Waldron CPI executive coaching services can align with and support your leadership development strategy, e-mail services@waldronhr.com.



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