



CASE STUDY

DEVELOPING
LEADERSHIP CAPABILITY



Business Services Industry

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Developing Leadership Capability



KEY TAKEAWAY

The global organization's key talent goals are to improve performance, build bench strength and enhance personal performance of its employees.



BEST PRACTICE

The engagement of the company executives builds credibility and instills prioritization and accountability for the assessment process.

A global organization which provides professional, technical and management support services to a broad range of key end markets, including transportation, facilities, environmental, energy, water and government, has worked with Profiles International since 2006 to uncover and develop the skills and capabilities of its leaders. With approximately 45,000 employees around the world, this organization is a leader in all of the key markets that it serves.

The Fortune 500 company provides a blend of global reach, local knowledge, innovation and technical excellence in delivering solutions that enhance and sustain the world's built, natural and social environments. Serving clients in more than 100 countries, it had revenue of \$6.1 billion during its fiscal year 2009.

Overview

In 2006, one of the organization's original operating companies began working with Profiles International to help senior leadership understand its individual strengths and areas of development. This strategic initiative was so successful that, today, the company is optimizing what it has learned at the senior levels, and is pushing the application of the CheckPoint 360^o™ and CheckPoint SkillBuilder Series™ strategically across parts of the workforce and the organization.

Leadership Development

The global company utilizes a number of programs and services from Profiles International to help improve performance, build bench strength¹ across the organization and its businesses, and enhance personal performance of its leaders. Three key tools include:

- CheckPoint 360^o™;
- Individual and group coaching; and,
- CheckPoint SkillBuilder Series™.

CheckPoint 360^o™

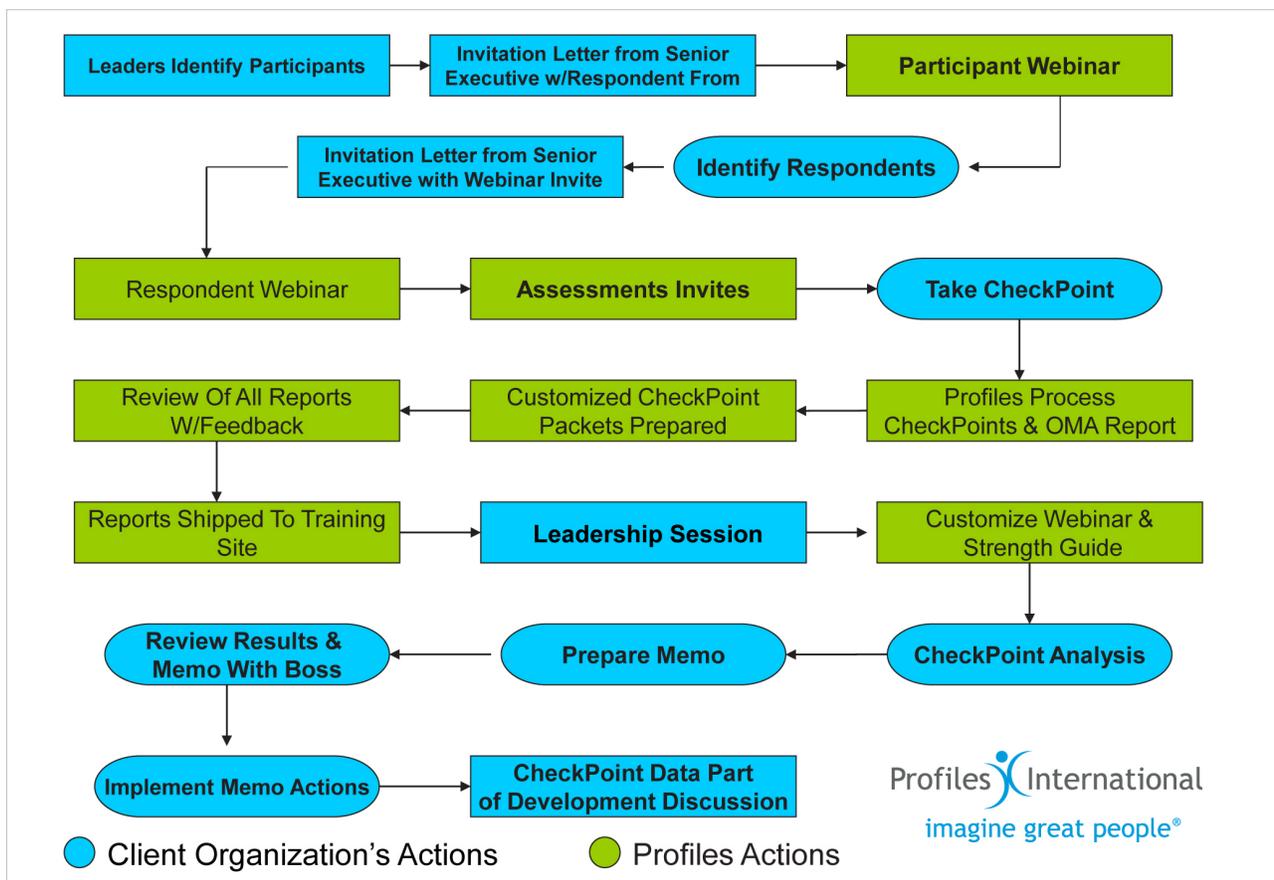
The organization uses Profiles CheckPoint 360^o™, including a set of 18 standard competencies that are universal and which capture the fundamental skills for leadership.

Working in partnership with Profiles to implement the 360 tool, the company used a number of steps to make the process a success (see Figure 6).

¹“Bench strength” refers to the capabilities and readiness of potential successors to move into key professional and leadership positions.

- Communication from a senior executive builds credibility and priority of the process.
- Webcasts are conducted by Profiles consultants to educate the leaders and their raters about the process.
- Profiles distributes the online surveys and develops the reports.
- Senior executives analyze the information and integrate data into the organization’s talent strategies.

Figure 6: Leadership Assessment Process



Source: Profiles International, 2009.

The company’s training and development group has also built a solid understanding of Profiles and how to utilize the vendor’s tools. As a result, the group is able to support the successful application and implementation based on individual leader needs.

Further, the managers of the participating leaders receive coaching about how to conduct an effective leadership development discussion. A custom one-page guide or job-aid (see Figure 7) was also created, which documents the process – and includes recommended discussion topics and tips for providing feedback and creating on-the-job actions that will insure success.

Figure 7: Manager Job-Aid for CheckPoint 360

Meeting With Your Boss

CHECKPOINT 360° DISCUSSION AGENDA	
<p>Purpose: To discuss the <i>CheckPoint360</i>™ Feedback Report and action memo. To achieve leadership alignment and agree upon appropriate follow-up in support of the implementation of actions within the action memo.</p>	
1. LEADERSHIP ALIGNMENT DISCUSSION	DISCUSSION TIPS
a. Identify the leadership skills where there is alignment between the leader and the boss.	<i>Acknowledge where there is alignment and ask if he or she has any further questions.</i>
b. Identify any leadership skills identified as critical, but were not selected by the boss.	<i>Seek to understand why he or she chose the particular Leadership Skills as critical. Do not put the person on the defensive or cross-exam.</i>
c. Identify any leadership skills identified by the boss as critical, but were not selected by you.	<i>Explain why you selected those leadership skills as critical.</i>
d. Gain agreement on which leadership skills are not in alignment and are most critical to the organization's success.	<i>There is no rule that you cannot have more than six critical leadership skills. Remember - less is more!</i>
2. LEADERSHIP PERFORMANCE DISCUSSION	DISCUSSION TIPS
a. Discuss the talents identified by you.	<i>Ask how we can build on those talents.</i>
b. Discuss the performance gaps identified by you.	<i>Explain your assessment in any leadership skill labeled as a gap. Ask him or her to assess his or her performance in any leadership skill labeled as a gap. Be prepared to share suggestions so that he or she knows what to do to eliminate the performance gaps and focus areas.</i>
c. Discuss the focus areas identified by you.	<i>Share suggestions.</i>
3. REVIEW REFERENCE GROUP DATA	DISCUSSION TIPS
a. Discuss the direct report data.	Identify actionable areas for improvement.
b. Discuss the peer data.	Identify actionable areas for improvement.
4. REVIEW ACTION MEMO	DISCUSSION TIPS
Discuss the responses for each of the four questions.	<i>Be prepared to offer suggestions and to provide feedback. Ask what you might be able to do to support the implementation of the stated actions.</i>
5. ESTABLISH ACCOUNTABILITIES	DISCUSSION TIPS
Set a date and time for the follow-up meeting.	<i>Remember - be supportive.</i>

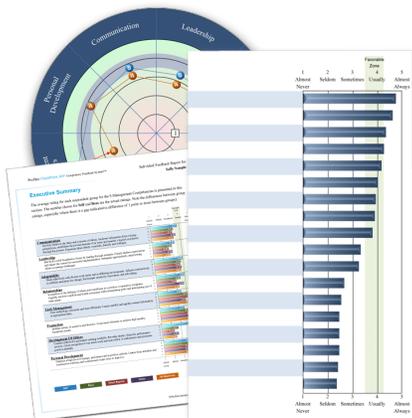
Source: Profiles International, 2009.

★ BEST PRACTICE

Training managers and giving them the tools for providing feedback facilitates the building of relevant action plans.

🔑 KEY TAKEAWAY

According to Profiles International, the average person is aligned with his manager between 46 percent to 53 percent of the time (*about three out of six skills*).



Reporting

Completion of the CheckPoint 360™ assessment results in a comprehensive individualized report, which is provided to each leader and his / her manager. This report is used as the foundation for a discussion between the leader and an assigned coach (discussed in more detail in the next section).

An Organizational Management Analysis™ (OMA) is also completed. The CheckPoint OMA is a comprehensive tool (designed specifically for senior executives) that provides valuable insights into the overall abilities and alignment of the 18 management skills sets. This is a high-level overview of all of the individual leader results (e.g., a group report). The OMA report is about 15 to 20 pages long and has the following four key deliverables.

1. A detailed description of how company leaders were rated individually, as well as collectively.
2. A detailed analysis of alignment between individual leaders and their managers, regarding the critical skills sets important for business success. Of the 18 management skills, the leader and manager are asked to select six that are most critical with the hope that both individuals' selections align. This sparks a necessary conversation between the leader and his / her manager.
3. A composite on favorability against the 18 management skills. This is essentially an organizational skills gap. As an example, for "instilling trust," 60 percent of leaders may be rated above favorable and eight percent may receive a less than favorable rating.
4. A description of what each leader needs in terms of development. This information allows the organization to prioritize its leadership development initiatives. The report includes recommendations of specific types of training interventions based on the individual gaps identified.



ANALYSIS

A coach is essential to a 360 feedback process for ensuring that the learner correctly interprets and accepts the information received.

“We find it useful for Profiles to conduct the coaching session. They have the expertise in the assessment instrument and it provides for a trusted environment to gain insight into the leader’s development needs.”

Coaching

Coaching is provided by Profiles to help leaders interpret the report correctly and create a development plan. The company’s senior vice president of HR for North America stated, “We find it useful for Profiles to conduct the coaching session. They have the expertise in the assessment instrument and it provides for a trusted environment to gain insight into the leader’s development needs.”

A primary purpose of a coach is to ensure that people get the correct message from the 360 assessment. Once the leader understands and accepts the feedback, then the coach works with the leader to create a development plan for achieving higher levels of effectiveness. This action plan should also force some accountability onto the leader.

The coaching relationship continues over the next 30 to 45 days and, in some cases, up to six months. This is based on how much emphasis the organization wants to place on this part of the process. For the first four weeks, it is common for weekly or biweekly phone calls, which help the leader focus on what he / she needs to do to arrive at a plan.

To be successful, the coach needs to have context and ask questions of the leader in the right way. The coach must make the hard statements, and reinforce the purpose and goal. Also, the coach must always remember that the customer is the company and not only the leader who he / she is coaching.

CheckPoint SkillBuilder Series™

The CheckPoint SkillBuilder Series works in conjunction with the 360 assessment to help managers improve performance. The global organization takes advantage of this offering, so that its leaders can improve their performance “just in time.”

For each of the 18 competencies, there is a SkillBuilder that goes along with it. This is not a course but, rather, tips and tools for improving a skill on the job. Each SkillBuilder is similar to a teaching opportunity and lasts about six weeks. For example, if delegation was identified as an area for improvement, a leader can use the SkillBuilder to work through the process. The process may include the following three steps:

- The first activity may be to identify and list some tasks that can be delegated.



KEY TAKEAWAY

Providing relevant developmental opportunities immediately following feedback increases the likelihood that skills and behaviors will be changed.

Leaders who have gone through the 360° process and received coaching have done quite well.

“The concept is that you start small and then expand slowly when something works. Take best practices that work in various operating units and bring them into the fold of the broader organization. It says a lot more when you have a senior leader from the operational side saying that this is a valuable tool. Creates buy in by the business, which is absolutely critical to get to a win-win.”

- The second activity would be to identify people to whom the tasks can be delegated.
- The third step may involve listing the pros and cons for delegating to each of these people.

The SkillBuilder Series is highly interactive. By the time the leader is done, he / she will actually have things to delegate. The selection of the SkillBuilders is prioritized between the leader, coach and manager. Each SkillBuilder comes with a custom coaching guide that includes tips for every activity and a coaching agenda for up to six critical coaching sessions. Upon completion of each SkillBuilder, a plan is produced that includes lessons learned from all activities and a strategy for ensuring skill changes are sustained.

Summary

Since 2006, the company has been using Profiles' CheckPoint 360™ and CheckPoint SkillBuilder Series™ to uncover and develop the skills and capabilities of its leaders. The company began with its senior leadership team, and is now (with much success) tapping into these resource tools for specific individual needs and business groups. “The concept is that you start small and then expand slowly when something works. Take best practices that work in various operating units and bring them into the fold of the broader organization. It says a lot more when you have a senior leader from the operational side saying that this is a valuable tool. Creates buy in by the business, which is absolutely critical to get to a win-win.” Senior Vice President, HR for North America

Overall, the company leaders who have gone through the 360 process and received coaching have done quite well. Some of those leaders have moved into broader positions, others have been promoted and still others have learned more about themselves through the eyes of the Checkpoint 360. According to the senior vice president, HR for North America, “Profiles has established an extended relationship with [us] through its global business model ... Profiles International has become a true and trusted partner.”