

## Team Coaching & Learning

### The Situation:

This client was a senior executive looking for a way to transfer and build upon the learning she had gained through executive coaching. She wanted this to happen by working with her team of direct reports. She believed that her whole team would benefit if they were exposed to similar learning and support. However, because of the cost, providing one-on-one executive coaching for individual team members was not viable.

Her colleagues on the leadership team expressed similar thoughts. They thought it would be useful and would accelerate the benefits of their own coaching if their direct reports could be 'on the same page' in regard to the management concepts and skills they were learning.

Talent management – recruitment and retention – was the most critical business issue for this firm. The opportunities for business growth were substantial ... the challenge was making sure they had enough skilled people to deliver on the projected new business. The competition was fierce in recruiting entry level professionals and turnover was high – especially at the new manager level. In addition to understanding and addressing the different needs of Generations X and Y, they determined that 'people leadership' was a key factor, among others, to creating the kind of business environment that would attract and retain quality people. People skills were no longer a 'nice to have' – no longer second to business development as a core leadership competency. A significant investment in senior leader executive coaching was having a very positive impact. A long term commitment to developing effective people skills at all management levels was determined key to the firm's ability to meet the future growth challenges.

### Pre-work

This client initially approached their executive coaching providers for a proposal to cascade the coaching down into the organization. This organization is a small and successful boutique firm and did not feel it had the desire or capabilities to bid for this work. Because they utilize the Team Management Profile and the QO2 in their coaching work, we were contacted by them to develop an approach that would build upon and support their work with the executive team. Our initial meetings with this organization along with parallel meetings with the client firm and team leader helped customize and shape the proposal design. Key concepts – references, principles, models – were identified along with the specific coaching approach/methodology.

### Overview

**Client:** Professional Services

**Team Size:** 6

#### **TMS Products Used:**

*Team Management Profile, Team Working Wheel job aid and Team Performance Profile*

#### **Other Products Used:**

*Changing Role of Management*

## **Action Taken**

The primary objective of the initiative was to establish a peer coaching format and coaching skills that was self managing and therefore sustainable. We essentially followed the design outlined in the case study outlined for Peer Coaching & Learning with a few key exceptions:

- This was a time limited initiative. The client designed an evaluation approach that would enable them to determine if this was an effective way to move forward with other teams.
- The concepts covered had to be consistent with those delivered by the executive coaching organization – making ongoing collaboration between our two companies critical.
- We were working with the 6 direct reports as an intact group with the capability of working closely together in a peer coaching format with the team leader well past the initiative.

With that in mind, the following process was followed

### The first half-day session:

It was critical to ground this initiative well in the core Types of Work Model using the Team Working Wheel. This established a common language – one that the team leader was already familiar with. The Team Working Wheel (TWW) was used up front and working with the key words, phrases and questions from the wheel itself the group analyzed their own work over the past number of months, identified at a somewhat subjective level where they might have strengths or weaknesses. In effect, they were discovering the model by working with it. This work builds the business case for understanding preference and the utility of the Team Management Profile (TMP) which was then presented later in the same session. Once the TMP was introduced, the individual preferences were mapped onto the Types of Work model – leading to a facilitated discussion regarding their team dynamics. Finally, the structure for the coaching groups to follow to discuss real issues through the lens of these concepts was introduced.

### Weekly Peer Coaching & Learning Meetings:

The team agreed to meet weekly for one hour with team members bringing real business issues to the group and discussing them through the lens of the Types of Work and/or the TMP. During this time frame the Team Performance Profile was also administered.

### The second session:

The second session was a day and a half and took place six weeks later - the purpose was threefold. One, an opportunity to debrief what they had accomplished and what they had learned about coaching each other. Two, a review of the results of the Team Performance Profile, what actions were needed to address these results and how they might apply coaching skills to these actions. Three, coaching skills were developed through using the concepts presented in The Changing Role of Management. The agenda/content of this session was created in consultation with the executive coaching organization with the team leader providing coaching application stories.

Weekly Peer Coaching & Learning Meetings: At this point, our role was complete ... the coaching groups continued to follow their meeting pattern as noted above.

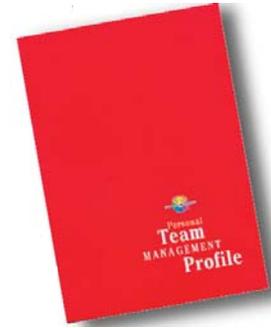
## **Results**

The design of the coaching process is based on complexity and action learning research and principles. The client evaluated the initiative by asking for specific examples of how the concepts and/ or peer meetings had impacted their management style. Overall this process worked very well for the client ... well enough for them to roll it out to 2 other times to continue to assess. A key side benefit was the feedback from the team leader who was struck by the degree to which the team process had provided the opportunity to practice new skills with each other.

*See the next page for a brief overview of some of the profiles and products used in this case study.*

## Team Management Profile

The Team Management Profile (TMP) is a researched, work based preference assessment that is used world wide to help teams and individuals improve their performance. The 4000 + word profile is created from the participants responses to 60 questions focused on 4 measures of work preference. The on-line questionnaire takes about 15 - 20 minutes to complete and a hard copy profile is provided to the end user. The profile is debriefed with the end user by an Accredited TMS Network Member either one on one or in a team session such as the TMS Team Alignment Workshop. The profile contains data concerning the individuals work preferences relating to:



- Primary Areas of Work Preference
- Related Areas of Work Preference
- Leadership
- Decision Making
- Interpersonal Skills
- Team Building
- Areas for Self Assessment and Improvement
- How Others Can Effectively Interact With You

The TMP is actually a combination of two distinct, yet related models. The first is the Types of Work Model which focuses on the work that high performing teams and individuals regularly must perform. The second is the 4 Measures of Work Preference, which focuses on how we prefer to do our work. When combined, a third model emerges, the Team Management Wheel, which is the basis of the profile.

## The Changing Role of Management

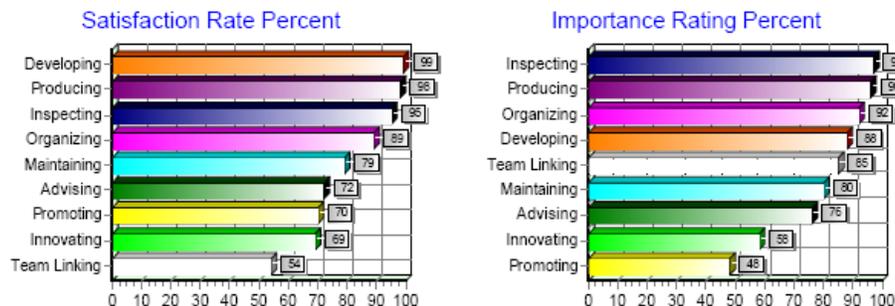
Focusing on the concepts of power, mental models, self and shared management this session challenges the way we think about managing in organizations. Participants then take these concepts into their real work scenarios and apply them.



## The Team Performance Profile

The Team Performance Profile is a team multi rater assessment that measures the team's and possibly other stakeholder groups perceptions of the importance of each the work functions to the team's performance and how satisfied these groups are in the team's performance in the work functions.

### Team Members



(Sample data from the Team Performance Profile)

Packed with practical information, the Team Performance Profile provides data to enable groups to have valuable discussions about where they need to focus their efforts to produce the most effective performance for themselves and their stakeholder groups.