

Intake Survey Report Guide

Thank you for completing the intake survey. The intake report shows you how successfully you engage in different leadership behaviors associated with each of AceUp's 12 competencies. The higher you score in a competency average, the stronger your mastery is of that competency. The lower you score in the competency average, the weaker you are in your mastery.

We recommend that you review the report and then discuss it in your next session with your coach to determine which competency(s) you want to focus on in your next 90 days of coaching. We recommend you limit yourself to a maximum of 3 areas for growth in your next 90 days and focus on making 1 behavior you want to make a meaningful change in for each competency. Your coach will also receive a copy of this report in advance of your next session so that the two of you can be as aligned as possible.

How to review your coachee's answers to the competency reflection questions from their intake survey:

1. Open the coach matching email that you received, subject line: "Coaching Opportunity"
2. Open the attached pdf that shows the coachee's answers to their intake survey.
3. Review the coachee's answers to questions 57-61
4. Use this guide to review the top competencies the coachee has decided to work on this quarter. Note that this is written to the coachee so you can see exactly what is shared with coachees in order to prepare for your upcoming complimentary coaching call.

Coachee Guide to Behavioral Change & Competency Mastery

LEADING SELF	
COMPETENCY	PAGE
Improving Time Management, Organization, and Productivity	3
Developing Leadership Presence	4
Transitioning from Subject Matter Expert to Leadership	5
LEADING OTHERS	
Communicating Effectively and Influencing Stakeholders	6
Growing Emotional Intelligence	7
Managing Conflicts and Difficult Conversations	8
LEADING CHANGE	
Regulating Stress and Building Resilience	9
Leading with a Growth Mindset	10
Facilitating Effective Change Management	11
LEADING ORGANIZATIONS	
Collaborating Across The Organization	12
Developing a Coaching Approach to Management	13
Building and Leading Inclusive Teams	14

LEADING SELF

Improving Time Management, Organization, and Productivity

Time is a finite resource, and perhaps our most valuable one. In this digital age, our time and attention are being pulled in more directions than ever before. Mastering time management is essential to success at work and in life, but it's typically something that leaders are left to figure out for themselves. When leaders aren't using their time intentionally and aren't prioritizing effectively, it can lead to burnout and teams that are "busy" but not productive.

Improving Time Management, Organization, and Prioritization is a training designed to fast-track the learning curve and arm participants with easy-to-implement frameworks and skills around effective task management, realistic planning, and strategic prioritization. In addition, the training provides simple techniques for increasing focus and minimizing distractions while helping leaders understand the common roadblocks to productivity and practical, tactical strategies for breaking through those roadblocks so that they can achieve more with less effort and less stress.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I use a system to manage my tasks and meet deliverables.
- ▶ I consistently communicate updates and priorities across my team and organization.
- ▶ I make sure to give myself personal time during the day for self-care, meditation, prayer, exercise, etc.
- ▶ I make some time during each day when I can work uninterrupted.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING SELF

Developing Leadership Presence

Many leaders find themselves stalled in positions far below their ambitions. Though their skills are outstanding, they get frequent indications that they aren't seen as promotable. They aren't as influential as they want to be, are overshadowed at meetings, freeze in conversations with senior executives, are afraid to speak out, stammer when they need to be clear, and lack the confidence they need for key networking events.

Developing Executive Presence helps leaders raise their awareness of how others' perception creates their current reality. It helps them identify key areas where they can develop the skills needed to increase their visibility and their value to the organization. Executive presence takes leaders from the frameworks to the specific behaviors, skills, and habits that will transform their personal brand. Within months, they are being offered opportunities that had been beyond their reach.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I pay attention to my audience's body language and adjust my communication in response.
- ▶ My ideas and decisions inspire and influence others.
- ▶ I make myself heard when appropriate.
- ▶ I make timely decisions even in the midst of uncertainty and risk.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING SELF

Transitioning from Subject Matter Expert to Leader

You're an expert in what you do. You're the go-to person in your area at your company — recognized, respected, and rewarded. Managing others can be a real challenge, especially when you don't have prior experience and didn't have the chance to get training. In these cases, you may not be having the impact you want. You'd like to learn the best managerial practices to empower you as a leader and make a bigger impact, and that means stepping into a bigger leadership role.

Transitioning from Subject Matter Expert to Leader is about clarifying leadership strengths you may not be fully aware of and using them to strategize a path forward so that you can become a confident, authentic leader. It's about learning how to empower the people who report to you to take more ownership of tasks, projects, and problems and about learning to shift from "No one can do it as well as I can" to "Now I can shift to more strategic thinking because my team is on it." It's about being able to elevate your thinking and focus by elevating those you lead.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I consistently communicate about processes, progress, and data to all stakeholders.
- ▶ I adapt my leadership approach to what others need/respond best to.
- ▶ I navigate political dynamics on my team and in my organization.
- ▶ I delegate tactical tasks to my team so that I can think strategically more often.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING OTHERS

Communicating Effectively and Influencing Stakeholders

The most common communication mistake that leaders make is focusing more on crafting their message and delivery than on learning what concerns and motivates their audience. A leader may have the best idea, but unless they put it in terms that resonate with the people who need to put it into action, it won't have any impact. In fact, if it isn't aligned with the audience, it can even backfire.

Communicating Effectively and Influencing Stakeholders is about empowering your organization by putting the needs and concerns of key stakeholders into all your communications. It's about building consensus and creating meaningful and sustainable change through a more inclusive and widely aware approach to communication. It's about giving leaders the tools and practice they need to bring everyone forward.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ Before communicating, I take into consideration what the recipient(s) need(s) to know, and how best to convey it.
- ▶ I engage stakeholders in dialogue before and after a major meeting/presentation.
- ▶ I move and motivate my audience towards new action.
- ▶ I am able to maintain my composure and offer different perspectives to critical situations.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING OTHERS

Growing Emotional Intelligence

Emotional intelligence (EI) is a leader's ability to manage their emotions and to respond appropriately to the emotions of others. Achieving long-term, complex goals is accompanied by intense emotions – frustration, anger, joy, worry, enthusiasm – and leaders who do not manage these emotions in themselves and others well often fall short of expectations. The leader who loses their temper and yells at their team damages relationships and closes communication. The manager who responds to their direct report's frustration with disdain leaves members of their team feeling devalued and unmotivated.

Growing Emotional Intelligence will help your leaders learn how to work with and regulate their own emotional state so that they can respond to their teams, peers, and leaders from a place of calm. They will be able to recognize and appropriately respond to others' emotions. By increasing their emotional intelligence, leaders will deepen their collaboration, build trust, motivate and inspire others, and improve their communication.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I consider others' emotions before, during, and after important interactions.
- ▶ I monitor and manage my own and others' emotions effectively.
- ▶ I listen well and am attentive to emotional cues.
- ▶ When I work with teams, I draw all members into enthusiastic participation.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING OTHERS

Managing Conflict and Difficult Conversations

Leaders face a number of challenges to being effective in their roles. Many don't want to be surprised yet hesitate to raise key issues before it's too late. Others try to stay friends with peers instead of asserting their leadership role and delivering the feedback those peers need to grow in their roles. Others back down as soon as they are challenged, pushing key issues and pain points down the road. More and more articles in the business press are asserting that employees leave because of poor leaders more often than they leave because of bad companies.

Managing Conflict and Difficult Conversations is about providing process-centered communications that can reduce tension and guide challenging conversations through productive conflict. This allows team members to hear constructive feedback that has been given respectfully and act upon it. It's about creating well-oiled team machines that can be more responsive and nimbler because effective communication happens more frequently and collaboratively at all levels.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ When there is a disagreement, I share information with others to work towards finding a solution with them.
- ▶ In contentious situations, I conduct myself in a manner that supports open dialogue between all parties.
- ▶ I help others resolve complex or sensitive disagreements or conflicts.
- ▶ I take time to understand the perspectives of others when I disagree before I present my point of view.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING CHANGE

Regulating Stress and Building Resilience

According to the Center for Creative Leadership, leaders are more stressed today than they were five years ago and cite the most significant stress as having to do more with less and to do it faster. When not managed well, leaders are more likely to be close-minded, controlling, angry, and avoidant. These behaviors also ripple through the organization: low morale, decreased engagement, missed budgets and deadlines, and declining quality. These negative impacts persist even when leaders are not managing their stress well only 5–10% of the time.

Managing Stress and Building Resilience is about how to flex with the ups and downs of the leadership demands. When the stress heats up, it's about remaining calm, curious, candid, direct, and willing to listen. The organizational results can be profound. According to David Maxfield, coauthor of *Crucial Conversations*, improvements include meeting quality standards and customer demands 56% more often, increasing morale and meeting deadlines by 47%, and staying within budget 25% more often.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I use stress-reduction and reframing techniques to think more clearly in a crisis.
- ▶ I work to modify my self-limiting beliefs.
- ▶ I help others manage stressful situations and/or build resilience.
- ▶ I bounce back after a stressful event.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING CHANGE

Leading With a Growth Mindset

Decades of research have shown that most people in organizations see organizational and process changes as threats. Their brains respond with a “fixed mindset” that what they know and have done before is easier and safer while change can represent risks of failure, criticism, and embarrassment. This inability to solve problems due to our fixation on how work has always been done is referred to as ‘functional fixedness.’

Leading with a Growth Mindset is about training leaders on how to transform risks into opportunities, threats into rewards, the unknown into sources of curiosity, exploration, and discovery. Growth mindset training is based on research showing that a person’s growth mindset and willingness to take new approaches can be a better predictor of skills improvement than IQ.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I challenge myself to learn new skills and approaches.
- ▶ When things are ambiguous, I am able to find a path forward.
- ▶ I look for learning opportunities when I encounter setbacks, failures, or unexpected changes.
- ▶ I help others shift from a “be good” to a “get better” mindset.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING CHANGE

Facilitating Effective Change Management

Every day, we hear about companies launching sweeping change initiatives and celebrating all the benefits they will make. Unfortunately, most of those initiatives fizzle out and fail, generating more ill will and disillusionment than if they hadn't been launched in the first place. Why? Because they failed to engage the people who would be most affected and responsible for implementing them in the design, inquiry, and iteration process. Despite the fact that most initiatives fail for the same reasons, most companies just shrug their administrative shoulders and move on to the next one, which often fails for the same reasons.

Facilitating Effective Change Management is based on extensive research into what allows change initiatives to not only generate compliance but also inspire creativity, boost engagement, and increase productivity.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I seek out new approaches that could offer new benefits during change.
- ▶ I help others identify and/or support new approaches to their work that could offer new benefits.
- ▶ I take people's resistance to change into account when rolling out new ideas and processes.
- ▶ I use proven communication strategies/models during change management.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING ORGANIZATIONS

Collaborating Across the Organization

Great collaboration between divisions, teams, or different organizations can result in achieving more together than they can by themselves. Taco Bell and Doritos. Starbucks and Spotify. Pottery Barn and Sherwin Williams. Three simple examples that have changed the way we think about eating, how we feel when we go get coffee, and consider possibilities when we decorate our homes. They each committed to understanding their own organizational power and developed a conscious awareness of how they could share this to create significant achievement.

In retrospect, a successful collaboration appears simple. However, there are a few key items that each participant should either bring or be willing to consider when joining forces: 1) clear context around the big picture of the collaboration, 2) concrete goals, 3) recognition of legitimate needs (both internal and external), 4) clear roles, and 5) how to leverage for strength and compensate for each other's weaknesses. Joining forces to achieve greatness requires developing a common language, understanding current processes, committing to a consistent communication strategy, celebrating incremental wins, recognizing incremental losses, and a continual fostering of trust amongst everyone involved.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I help others see the bigger picture in order to solve systemic problems.
- ▶ I incorporate others' ideas into any change initiatives I promote.
- ▶ I seek others' input on how my ideas or projects can be improved.
- ▶ I collaborate rather than compete with my peers to achieve organizational success.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING ORGANIZATIONS

Developing a Coaching Approach to Management

Many leaders are frustrated that their teams aren't doing things the way they want them to. Others are seeking a more harmonious relationship with team members. And others are struggling with how to optimize what everyone can bring to their team. The common thread to all these challenges is a fixed notion of traditional top-down leadership. While this gives an illusion of clarity, it actually creates confusion, demotivates team members, and restricts their growth and creativity in problem-solving.

Developing a Coaching Approach to Management helps leaders make a shift in their mindset toward releasing talent's full potential. It does this through a coaching approach, which replaces narrow micromanagement with a broader framework that empowers employees to discover and deliver better results than the leader could have dictated or imagined. It allows for exponential growth in the team and the organization.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I help those around me develop their own approaches and problem-solving skills.
- ▶ I co-create objectives with my team members by asking first for their recommendations and then coach them to reach individual and team goals.
- ▶ I listen to my team members' perspectives before proposing solutions or possible courses of action.
- ▶ I help each team member understand how their role supports the bigger business picture.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?

LEADING ORGANIZATIONS

Building and Leading Inclusive Teams

Building and leading a strong and inclusive team is critical to business success. This is easier said than done. It's much more complex than hiring the so-called "right" people or fulfilling some quote. It is about creating the conditions where everyone can make their best contributions and stretch each other. The holistic "team" is far greater than its individual parts; therefore, it's imperative that a properly developed and managed team synergistically harnesses its individual members' talents, experience, and energies. Developing a great team begins with the most fundamental building block of teamwork: team dynamics. Team dynamics are what's at play when people collaborate; therefore, understanding the positives and the areas of opportunity to improve is the first step toward learning how to assess, shape, and build an effective team. We'll discuss how to identify our unconscious biases and how to course-correct our actions to create an inclusive and supported work environment for your team. When diversity and inclusion are engaged and amplified, new terrain can open up that creates exponentially greater success. According to research by McKinsey, companies that welcome a wider diversity of players and ideas increase engagement and retention, and are 35% more likely to outperform their peers. It is invaluable that our interpersonal communication skills are healthy, resulting in a positive contribution that invites everyone to contribute to the overall team effectiveness.

The behavior-based statements about this competency you used to rate your success level on the Intake Survey:

- ▶ I explore ways to improve collaboration, retention, and recruitment that include all members of my team.
- ▶ I hold others accountable for inappropriate behavior.
- ▶ I take active steps to help all team members develop their skills and rise in the organization.
- ▶ I withhold making critical judgements until I have reflected on my personal assumptions and biases.

Some questions to explore with your coach:

- ▶ What can you achieve or improve if you increase your success in this area?
- ▶ What most motivates you to explore new approaches in this area?
- ▶ Which of the four behaviors above are you most interested in improving?
- ▶ What existing systems could you leverage or experiment with?
- ▶ What would success look like in a month? 3 months? A Year?