Peer Coaching Overview

Andrew Thorn
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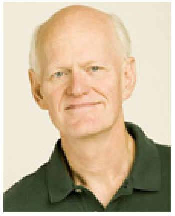
Marshall Goldsmith

Quick Reference for Peer Coaching		
Peer Coach Roles	• Thinking partner • Objective support • Accountability partner	Page 5
Measurement	360 or informal interviews with stakeholders.	Page 5
Target Behavior	Choose one clear, specific goal that resonates with client, and addresses stakeholder concerns. Develop measurement plan.	Page 7
Feed*Forward*	Find 'stakeholder moments' to practice new behavior and solicit suggestions for the future. Write down suggestions verbatim, and say only, "Thank you."	Page 8
Coaching Support	Regular check-in to support accountability, and share ideas for the future.	Page 11
Daily questions	Optional exercise to support real progress.	Page 11
Measure results	Stakeholders complete mini-survey.	Page 12



Marshall Goldsmith

Dr. Marshall Goldsmith is a world authority in helping successful leaders get even better – by achieving positive change in behavior: for themselves, their people and their teams.

In 2007 Marshall's new book, What Got You Here Won't Get You There, was ranked as America's #1 best-selling business book in both the New York Times and the Wall Street Journal.

Recently, the American Management Association named Dr. Goldsmith as one of 50 great thinkers and leaders who have influenced the field of management over the past 80 years. *Business Week* listed him as one of the most influential practitioners in the history of leadership development. He was recognized as a Fellow of the National Academy of Human Resources – America's top HR honor. His work has been featured in a *New Yorker* profile, *Harvard Business Review* interview and *Business Strategy Review* cover story (London Business School). Major business press acknowledgments include: *Wall Street Journal* - one of the top ten executive educators, *Forbes* - one of five most-respected executive coaches, *Economic Times* (India) – one of five rajgurus of America, *Economist* (UK) - one of three most credible executive advisors in the new era of business and *Fast Company* - America's preeminent executive coach.

Dr. Goldsmith's Ph.D. is from UCLA. He teaches executive education at Dartmouth's Tuck School and frequently speaks at leading business schools. He work has been recognized by almost every professional organization in his field. In 2006 Alliant International University honored Marshall by naming their schools of business and organizational studies - the Marshall Goldsmith School of Management.

Marshall is one of a select few advisors who have been asked to work with over 80 major CEOs and their management teams. He also delivers top-rated keynotes, seminars and workshops.

Dr. Goldsmith is co-founder of Marshall Goldsmith Partners, a network of top-level executive coaches. He served as a member of the Board of the Peter Drucker Foundation for ten years. He has been a volunteer teacher for US Army Generals, Navy Admirals, Girl Scout executives, International and American Red Cross leaders – where he was a National Volunteer of the Year.

Marshall's twenty-three books include: *The Leader of the Future* (a *Business Week* best-seller), *Coaching for Leadership* and the upcoming *Developing Your Successor* (in the Harvard Business *Memo to the CEO* series). Over two hundred of his articles, interviews, columns and videos are available online (for no charge) at *www.MarshallGoldsmithLibrary.com*.

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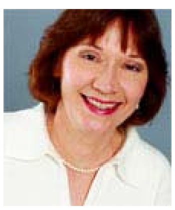
Andrew Thorn

Andrew Thorn is President and Founder of Telios Corporation based in Apple Valley, California. Since 2002 the company has assisted over 25 publicly traded and 50 privately owned companies to develop and implement innovative transformation programs.

Andrew created In-Tandem™, a two-way coaching process. This process is implemented via peer and mentor partnerships. Andrew later partnered with Marshall Goldsmith to inject portions of the Goldsmith Coaching Model into the two-way coaching process. In-Tandem™ is offered exclusively through Telios Corporation.

Andrew is also the creator of Consensus™, a team coaching model and Global™, an organization-wide coaching model. He is internationally renowned for his ability to successfully work in cross-cultural environments.

Andrew is a graduate of Pepperdine University, the College of Executive Coaching in Santa Barbara, and the Marshall Goldsmith School of Management, Alliant International University in San Diego.



Marilyn McLeod

Marilyn McLeod has been working with Marshall Goldsmith since 2002, and was certified in his coaching process in 2004. She helped launch Peers@Haas, the first Peer Coaching Program at the Haas School of Business, UC Berkeley, in 2007.

She is currently Executive Director of the Thought Leader Project for the Marshall Goldsmith School of Management, Alliant International University.

She also manages www.MarshallGoldsmithLibrary.com.

What is Peer Coaching?

Peer Coaching was originally developed as a cost-effective way to provide quality coaching to mid-level, high potential and emerging leaders. The process was originally developed by Andrew Thorn who later partnered with Marshall Goldsmith to extend many of the benefits of the Goldsmith Coaching Model. Marshall Goldsmith's personal involvement and extensive experience of helping successful leaders get even better gave energy and momentum to this unique process. It is now implemented in over 20 organizations and is achieving significant results in accelerating leadership development. Its design creates sustainability and reduces the cost of training by involving each participant as an equal partner in the process.

In Peer Coaching, each participant acts as both the coach and the coachee (or client).

The result is a more collaborative leadership base committed to continuously becoming more successful.

Some of the benefits:

- Personal development plan
- Reduce isolation among leaders
- Establish collaborative norms
- Build a shared knowledge base
- Enable leaders to give and receive ideas
- Share successful practices
- Transfer training to the workplace
- Encourage reflective practice
- More cohesive organizational culture
- Accelerate leadership development

What Peer Coaching is and isn't:

- It is professional, not social dialogue
- It is observation based
- It is not an evaluation tool
- It is developmental
- It is not a competition
- It is supportive
- It is confidential
- It is based on individual growth
- It is voluntary
- It is founded on trust

Peer Coach Roles

Each coach plays three basic roles for the other. From the peer coach's point of view:

- I'm your thinking partner
- I'm here as objective support
- I'm here to help you be accountable

Thinking Partner:

It's always easier to see someone more objectively than yourself. Even if I'm struggling to improve in the same developmental areas as you, I am much more capable of identifying a solution for you than I am for myself. It is difficult to know what to do when we find ourselves in the heat of a developmental opportunity.

Having someone I can turn to for direction when I'm lost in my old patterns is enormously helpful, especially when this person is someone who knows me and, and is someone I can trust enough to reveal my blind spots and vulnerabilities.

Objective Support:

My stakeholders know my old patterns well because they've lived and worked with them over time. You as my peer coach come from a fresh point of view. You can see beyond our history, and you can see many more possibilities and strategies that are way outside the box of my habitual work experience.

Accountability:

I know you're going to ask me how I'm doing with the goals I set last week. You're the one I entrusted with my list of what I really want to accomplish, and what I've committed to myself I'll actually do. I'm counting on you to remember to ask me.

How Do We Measure Success?

An Executive Coach or Change Management Specialist is charged with the responsibility of managing the overall coaching project for the organization. One of their primary responsibilities is to conduct individual stakeholder surveys and interviews to gather initial and continuous feedback on behalf of each participant.

Each participant may also conduct his or her own interviews. The interview process always focuses on discovering the answers to the following questions.

- What is the client doing well?
- How could they improve?
- What suggestions do you have for their future?

The person conducting the interview will take careful, verbatim notes of all comments and suggestions. If comments are general, the person interviewing will probe for more specific comments. The more specific, the better. The combined information from a variety of people assists each participant to create a very clear and specific development plan.

Some considerations when choosing your stakeholders:

- Are these people in a position to give me accurate information about my behavior? They might be supervisors, peers, and direct reports.
- Do they feel safe enough to be completely honest with me?
- Will they be fair?
- Will they take a few minutes on occasion to give me their suggestions?

How can a stakeholder be most effective?

- Make a commitment to forgive and forget the past.
- Make your observations constructive, specific and behavioral.
- Be positive and supportive.
- Be honest and fair.
- Understand the client won't be able to act on all of your suggestions.
- Your role is to become a helpful coach to the client. Set aside any impulse to be a cynic, critic or judge.

Questions are basically the same in either case:

- What is the client doing well?
- How could they improve?
- What suggestions do you have for their future?

The person conducting the interview will take careful, verbatim notes of all comments and suggestions.

<u>Specific Comments</u>

If comments offered are general, the person interviewing will probe for more specific comments. The more specific, the better. Sometimes very small ideas from a variety of people add up to a very specific picture that helps the person being coached understand much more clearly what those around them experience and would like to be different.

<u>Behavioral Comments</u>

This coaching process is about behavioral change. Only comments that describe specific behaviors of the client will be useful.

The process:

- Write all comments down verbatim
- If someone other than the client is doing the interview, compile comments by topics, mixing entries so comments will be anonymous to client.
- Provide a written list of everyone's comments to the client.

Determining the Target Behavior

Assuming discussion with stakeholders focused on 'what can this person do better' with a look to the future rather than criticizing the past, the list of suggestions may not be so difficult to take. Actually it's information worth its weight in gold if used honestly.

If an Executive Coach or Change Management Specialist is managing the overall Peer Coaching process, they will generally meet with each participant to review the results of initial assessment, and clarify a developmental goal.

Alternatively, the two-way coaching partners may help each other to review the interview comments, select a developmental goal and clarify the final goal statement.

Having your Peer Coach reviewing the suggestions with you can be valuable in many ways:

- You may have a tendency to only look for criticism. Your Peer Coach can bring to your attention the positive comments as well.

- Your Peer Coach may be able to see patterns more clearly because they're not emotionally involved in the same way you are.

- Talking over the comments with your Peer Coach can have a synergistic effect … you may both eventually see the opportunities in a new light, which can lead to an approach from a completely new dynamic.

- It's easier to go from understanding input to creating an action plan with your Peer Coach guiding you to the next step.

- Make your action plan clear, measurable and achievable. Set regular times to check in with your Peer Coach.

Some participants may feel ambitious and want to set more than one goal. Marshall's research indicates that the greatest success is realized by selecting one developmental goal. Focus is important. We are all busy. There is probably one behavior that, if improved, will make a substantial difference in other areas as well.

One important caveat: It's key that the client choose a goal they are passionate about. Enduring change requires commitment over time. Success is much more likely if the client is working toward something they truly desire.

Feed*Forward*

How excited do we get when someone tells us they want to give us some feedback? What usually follows this type of offer?   Usually something that sounds much more like criticism, blame, and analysis of what we did wrong. Not many of us find this very appealing.

Marshall found that if instead of focusing on feedback (looking in the past to create a list of past sins), we focus on Feed*Forward* (making and soliciting suggestions for the future), it becomes a very constructive and productive experience. Some might even go so far as to call it 'fun'!

How does this work?

- Choose something you'd like to improve
- Ask random people for their suggestions

Feed*Forward* is a process of gaining positive suggestions from others that are pertinent to improving performance in a specified area.

Why not rely on feedback alone? Why do I need to do Feed*Forward*?

- Many people are afraid that you will not be able to handle the feedback so they do not tell you the truth.
- No one ever feels like they are creating job security or strengthening friendships when they give feedback.
- Feedback is sometimes a negative experience and can cause hard feelings.
- It is very difficult to grow and navigate change when all you have is information about the past.

Why does Feed*Forward* work?

- When you make it clear to your stakeholders that you need their help in order to improve an area of development they become willing to share their ideas and thoughts on how to get better. They finally feel like they have a stake in the process.
- Feed*Forward* is focused on sharing positive, future oriented suggestions.
- By following up on the suggestions you receive, you demonstrate your commitment to grow and your stakeholders develop an increased desire to help you and to share their thoughts and ideas.

How Do I Implement the Process?

- Make it informal.
  - You can ask for Feed*Forward* suggestions in person, on the phone or via email.
  - Don't wait for scheduled meetings. Pay attention to what is being said and what you are doing and use the natural opportunities to ask your stakeholders for help.
- Keep your conversations focused.
  - The purpose of the Feed*Forward* conversation is to answer the question, "What can I do to get better in my area of development."
  - Avoid using this time to talk about other items or concerns.
- Keep the conversation very simple.
  - I am working on becoming a better listener. Can you give me a positive suggestion on how I can do this?
  - What can I do to become a better listener?
  - What are some positive things you have noticed that good listeners do?

How Do I Select My Stakeholders?

- The best people to help you are those that are in a position to give you accurate information about your behavior? They might be supervisors, peers, and/or direct reports.
- You need to make sure that they feel safe enough to be completely honest with you?
- Will they be fair in their assessment?
- Will they take a few minutes on occasion to give you their suggestions?

How can a stakeholder be most effective?

- Make a commitment to forgive and forget the past.
- Make observations constructive, specific and behavioral.
- Be positive and supportive.
- Be honest and fair.
- Understand the client won't be able to act on all suggestions.
- Stakeholder role is to become a helpful coach to the client, setting aside any impulse to be a cynic, critic or judge.

What are the major roadblocks to doing Feed*Forward*?

- What are the roadblocks that keep you from doing Feed*Forward* with your stakeholders?
  - It feels awkward.
  - I think it needs to be a formal process.
  - It is difficult to change culture; this is not reflective of the current culture.
  - I am so busy already, how do I fit it all in my schedule.
  - I don't know how to do FeedForward.
  - I don't know how many stakeholders I need.

- How can I overcome these roadblocks? What are some of the best practices used to create success?
    - Don't put too much pressure on yourself.
    - Make it an informal experience. Fit it into your regular conversations.
    - Create a reminder in outlook.
    - Practice what you are going to say with your Mentor/Mentee partner.
    - Cast a wide net and include as many people as you possibly can.
    - Be quick – 2 minutes may be long enough.

Some Important Things to Remember

- Your stakeholder's recommendations are accurate reflections of how you can improve from his/her perspective.
- The responses you receive are current indicators of your behavior.
- FeedForward is a way for your stakeholders to support you in your goal and challenge you to get better.

Say Thank You

- The answer to every stakeholder suggestion is "Thank you"
    - You are not thanking them for the content of their ideas.
    - You are thanking them for willingly helping you.
- Avoid the temptation to grade or debate responses. Just say "Thank you"
- You do not need to implement every suggestion.
    - Discussion suggestions with you peer coaching partner.
    - Ask yourself, "What would happen if I implemented this suggestion?"

Your success in getting better in your selected area is directly correlated with the amount of follow-up you have with your stakeholders.

The fascinating part of this exercise is that you're often asking people you don't know at all … and amazingly enough their suggestions are pretty useful!

Another surprise … we find many other people have the same issues we have! And we can help them even if we feel lost helping ourselves!

The magic of Feed*Forward* is that it's a positive way to get many more ideas than one could ever actually use … and there's no commitment to use the ideas!

The only requirement … just say "Thank you". Don't argue, complain, analyze … just say "Thank you" and write down the idea verbatim.

Peer Coaching Support

Here are some tips to help you provide effective support to each other:

- It's easy to focus on the negative. Help each other look at the good news in information gained from stakeholders. Give equal airtime to the good as well as the more challenging areas.

- Remind each other it's not about the past. Reframe everything in the form or what can be done in the present and future.

- Avoid criticism, judgment, analysis, blame. Remember, this is Peer Coaching so you both are getting comments that aren't so easy to hear! It requires courage, honesty and humility to admit past mistakes. Look at them as clearly as you can without dwelling on them, make your sincere apologies and move on. Your only point of effectiveness is what you do with this information in the future.

- Help each other move past personalities. Don't try to figure out who made what comments, if you've received anonymous suggestions. Just look for the nuggets of opportunity, forgive everyone else for their side of the challenges, and look forward to how you can create a positive outcome for the future.

Daily Questions

Accountability is a key ingredient in a successful Peer Coaching relationship. How often you check in with each other depends on your schedules and how you've set up your goals. The most effective method we've found for staying on track and making maximum progress is what we call "Daily Questions".

Andrew Thorn introduced Marshall to this idea. After trying it out with Andrew, Marshall continued the practice with his good friend Jim Moore, former CLO of Sun Microsystems, Nortel and BellSouth. Both Marshall and Jim report amazing results.

Every day Jim asks Marshall the same 24 questions. Every day Marshall asks Jim the same 17 questions. Marshall and Jim each have a spreadsheet of each other's questions where they record for each other the answers: 'yes', 'no', or a number. Structuring the questions in this way keeps the phone call moving. Each phone call lasts only a couple of minutes. They send each other their completed spreadsheets weekly. If they miss a day or two, they simply 'catch up' later.

Some keys:

- Each person writes their own questions.
- No negative feedback. No comments that might produce any form of guilt.
- Yes to positive feedback! If you can make positive comments to reinforce success, by all means go ahead!

When writing your questions, you might think about different areas of your life, such as health, relationships, things you want to accomplish but don't seem to get to.

Questions Marshall suggests for improving relationships: "Did you say or do something nice for your wife? Your son? Your daughter?" For tasks you would like to do: "How many minutes did you spend ___?", or "How many sit-ups did you do?"

This process works well because it forces each Peer Coach to confront how they actually live their values … every day. You find you either believe that something matters or you don't. If you really believe it, you can 'put it on the list' and do it! If you really don't want to do it, you can face reality and quit kidding yourselves.

Measure Results

An important aspect of Marshall Goldsmith's coaching is measuring if the person being coached is actually improving. Improvement is not measured by the coach or the client, but by the stakeholders.

Mini-surveys are a simple and efficient way to measure behavioral change. They are very short and focus only on the leadership behavioral goal that has been selected by the person being coached. They are designed so that the stakeholders evaluate behavior that occurs only during the coaching period. They focus on the stakeholder's perception of the individual's improvement - not their effort.

After receiving the mini-survey results the client thanks the stakeholders, involves them in future change and continues the process. This is almost always a positive experience for the individual and for the stakeholders. When done consistently well, the positive change is seen quickly, builds momentum, and is sustained.

Managing Perception

(adapted from *What Got You Here Won't Get You There* by Marshall Goldsmith, Hyperion 2007.)

Wouldn't the world be a better place if we each had our own presidential press secretary to answer tough questions and "spin" our message all day long against any and all adversaries? (It would be great for us perhaps, but I'm not sure I want to live in a world where everyone is "spinning" everyone else.)

That said, there's something to be learned from the methods that politicians employ to stay in power.

Chief among these is staying on message – i.e., knowing what you want to say and then repeating it with extreme discipline and near-shamelessness, until it sinks in. If there's one thing we've learned in this noisy media age, it's that simple, un-nuanced messages break through the clutter and hit home with high impact. (I'm not saying that's always a good thing, but it's a fact of life.)

It’s the reason politicians in a hard election campaign run the same ads over and over again. They know that repeating their message works. The voters may get tired of hearing it, but the message sinks in.

You cannot rely on other people to read your mind or take note of the changed behavior you’re displaying. It may be patently obvious to you, but it takes a lot more than a few weeks of behavioral modification for people to notice the new you.

That makes it all the more vital that you proactively control the message of what you’re trying to accomplish. Here’s how to start acting like your own press secretary.

- Treat every day as if it were a press conference during which your colleagues are judging you, waiting to see you trip up. That mindset, where you know people are watching you closely, will boost your self-awareness just enough to remind you to stay on high alert.

- Behave as if every day is an opportunity to hit your message home – to remind people that you’re trying really hard. Every day that you fail to do so is a day that you lose a step or two. You’re backsliding on your promise to fix yourself.

- Treat every day as a chance to take on all challengers. There will be people who, privately or overtly, don’t want you to succeed. So shed the naïveté and be a little paranoid. If you’re alert to those who want you to fail, you’ll know how to handle them.

- Think of the process as an election campaign. After all, you don’t elect yourself to the position of “new improved you.” Your colleagues do. They’re your constituency. Without their votes, you can never establish that you have really changed.

- Think of the process in terms of weeks and months, not just day-to-day. The best press secretaries are adept at putting out the daily fires, but they’re also focused on a long-term agenda. You should too. No matter what happens day-to-day, your long-term goal is to be perceived as overcoming an interpersonal challenge – to the point where it isn’t a roadblock anymore.

If you can do this, like the best press secretaries, you’ll have your personal “press corps” eating out of your hands.

Recommended Reading:

Acting Like a Professional or Acting Like a Phony? by Marshall Goldsmith, Workforce Performance Solutions, May 2006.

Ask Questions Daily by Marshall Goldsmith, Leadership Excellence, October 2006.

Coaching for Behavioral Change, adapted from The Art and Practice of Leadership Coaching, edited by: H. Morgan, P. Harkins and M. Goldsmith, Wiley, 2005.

Give Yourself a Chance by Marshall Goldsmith, Fast Company, November 2003.

Helping People Achieve Their Goals by Marshall Goldsmith and Kelly Goldsmith,
It's Not About the Coach by Marshall Goldsmith, Fast Company, October 2004.
Leader to Leader, No. 39 Winter 2006.

Leadership is a Contact Sport by Marshall Goldsmith and Howard Morgan, strategy + business issue 36.

The Success Delusion by Marshall Goldsmith, The Conference Board Review January-February 2007.

To Help Others Develop, Start With Yourself by Marshall Goldsmith, Fast Company, March 2004.

Try FeedForward Instead of Feedback by Marshall Goldsmith, Leader to Leader, Summer 2002.

What Got You Here Won't Get You There: How Successful People Become Even More Successful! by Marshall Goldsmith with Mark Reiter, Hyperion 2007.

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