



Promoted to Fail?

How Executive Coaching Can Improve Performance in Newly Promoted Executives

by Rick Koonce

Promotion to a new position with increased, often corporatewide responsibilities can be a tremendous challenge. The following narrative explains how executives in one organization used coaching to prevent a manager from “derailing” in a new position.

Bart Collins, a fast-track manager with Huntington–NorthStar Corporation, had just been promoted to a newly created senior level position with considerable visibility within the company.¹ His new role required him to act as a change agent at corporate headquarters and work across many different functions to drive far-reaching process and culture change across the organization. Unfortunately, his inability to build strong relationships with key stakeholders in the company threatened to derail his efforts only months after he had accepted the position. Not only did this make management question its decision to promote him to such a high profile position, it also jeopardized his long-term career prospects.

Collins’s previous management experience within the company had been in areas of manufacturing and production, which required a disciplined focus to achieve regular and tangible goals and adherence to strict scheduling deadlines and requirements. He did not have a lot of experience managing

indirectly through influence and persuasion. In his previous position, he had managed a large manufacturing facility with 250 employees. In his new role, although he was slated to have a small team of 15, he was to manage mostly by working through other people and their staff.

The Issue

Difficulties arose for Collins almost from the beginning. Due to the fact that senior management had not clearly defined his responsibilities and objectives at the time of hire, Collins lacked a definitive roadmap. He also assumed that the introductory e-mail the CEO had initially sent to all senior corporate executives would give him the necessary credibility and solicit the support he needed to get a running start.

That was not the case.

¹ This case study is broadly based on some of the author’s recent coaching engagements. In addition to the names of the company and the individuals involved, characters, circumstances, and story particulars have been altered for purposes of illustration and to ensure confidentiality.

Collins rubbed a lot of senior business leaders the wrong way when he sent out e-mails telling them what he needed from them in order to implement the change initiative. His brusque approach in these e-mails and his somewhat “aggressive” tone in conference calls with corporate process owners and division managers did not win him much support. Instead of securing allies to assist him going forward, he quickly began to alienate people.

Defining the Coaching Approach

At their first coaching meeting, Collins and his coach came to the conclusion that his initial approach to working with others had been affected by the stress over not knowing exactly how he was going to succeed in the position or how he would be evaluated over time. The newly created position reported on a dotted line basis to five division-level VPs and the COO. No formal performance metrics had been established, and only a rough timeline for implementing the change initiative had been provided. Initially, no formal staff had been assigned to Collins; instead, he was expected to achieve his goals by influencing key process owners in numerous areas across the organization and persuade them to assign staff and resources to make the change initiative happen. It was envisioned that he would build his own team once the project had gotten under way.

Collins and his coach met with Collins’s immediate manager to clarify performance expectations and outline a general coaching approach. All three quickly agreed that improving relationships with critical organizational stakeholders should be a key coaching goal. After all, to succeed in the position, Collins would need to develop strong influencing and persuasion skills to build a coalition of champions to help drive the change effort.

Conducting a Narrative 360° Assessment

To better understand the organizational context Collins was operating in as well as the individuals crucial to his success, the coach conducted interviews with 25 key organizational stakeholders. Data from the interviews were then used as the basis for a detailed nine-month coaching plan. Interviewees represented a broad spectrum of functions within the company and offered both headquarters and field perspectives.

The interviews covered:

- the internal organizational challenges and climate Collins faced in managing the change initiative;
- how others had experienced Collins in his role to date, and how he could effectively manage and/or modify people’s perceptions of him;
- what people perceived as his professional strengths and areas that required further professional development; and
- what Collins could do to more effectively manage critical stakeholder relationships going forward.

Evaluating Interview Data

The fact that most interviewees characterized Huntington-NorthStar’s culture as a “strong relationship-based culture” was perhaps the most important finding of the 360° assessment. To succeed in his new position, Collins would have to take a much more process-oriented and relationship-based approach to achieve his objectives.

Interviewees were very specific. They recommended Collins:

- focus more on building trust among key headquarters stakeholders;
- adjust his interpersonal/communication style when working with others and adopt a more consultative and process-oriented approach;
- move more slowly to make sure people were with him and understood their roles in the initiative;
- realize that the “metrics” in his new environment were quite different from those in positions he had held previously;
- take a “high touch” approach to get to know key process owners and organizational stakeholders on a personal level (e.g., meet informally with process owners in person);
- solicit process owner input on how to make the initiative succeed;
- work closely with internal communications to solicit support for the initiative throughout the organization; and
- take a course in meetings facilitation to strengthen his skills in consensus building.

Based on the assessment findings Collins and his coach decided to focus their coaching work on four key areas:

1. Interpersonal style
2. Stakeholder management
3. Change management
4. Organizational communications

1 Interpersonal Style: Understanding the Power and Importance of Workplace Interaction and Communication

Bright (and driven) managers and executives, typically trained in the commercial and technical aspects of business, sometimes lack self-awareness of how their demeanor, style, body language, and vocal tone impact the people they work with. Given that workplace friction with coworkers had been a key reason executive coaching had been recommended for Collins, he and his coach began their work with a discussion of different interpersonal styles and the importance of using emotional intelligence when managing others. They also discussed why, in some cases, it is necessary to modify one's interpersonal, social, or communication style to connect successfully with others, be an effective influencer, and ultimately achieve critical business goals that rely on others for success.

Collins's basic instinct was to be a straight talker and a straight shooter. His task-oriented approach to getting work done (managing to concrete project goals and production milestones) had worked well in the field. However, it clearly did not serve him well at corporate headquarters where individual process owners were accustomed to operating quite independently and, in most cases, had established relationships with each other well before Collins arrived on the scene.

To be successful at headquarters, Collins would have to focus more on relationship building and organizational politics. Based on this fact, his coach suggested that, in addition to completing the Myers-Briggs Type Indicator (MBTI) (see box), they explore the issue of social style in depth. How "interpersonally versatile" was Collins? How effectively could he moderate or adjust his own style of communication and engagement to meet other people where they were or to combat organizational resistance?

Using the Myers-Briggs Type Indicator (MBTI) in Executive Coaching

The MBTI is a well-regarded personality assessment tool used by companies and organizations around the world. It identifies people's preferences on four scales:

1. Where a person likes to focus their attention (be it on the outer world of people and the environment or on the inner world of ideas and concepts).
2. How an individual gathers information.
3. How he/she makes decisions.
4. How a person approaches life in general (be it in a planned and organized way or in a flexible and spontaneous way).

There are a total of 16 distinct personality types that can be derived from different combinations of these preferences. Each type has different ways of communicating and interacting with others.

Business leaders at all levels need to be aware of their own preferences when it comes to matters of perception and judgment. Knowing their own behavioral preferences helps them understand why and anticipate where they may run into difficulties or conflicts with others, (i.e., why team discussions and decision-making processes may be difficult, and where miscommunication can occur due to differences in personal temperament and communication style).

Developing an appreciation of social styles

The coach suggested that Collins read *The Social Styles Handbook*, a guide to understanding different social styles individuals exhibit in the workplace and in their personal relationships. It describes four basic style types: drivers, analyticals, expressives, and amiables. All four styles have unique characteristics and each style type has different and unique ways of relating to other people.² Knowing one's own social style and becoming skillful at identifying the social styles of others is a key contributor to creating effective, productive, and harmonious interpersonal relationships. Because it helps foster awareness of one's own behaviors at work and teaches ways of how to temporarily modify one's style when working with, communicating, or managing other people, it complements the MBTI.

² Wilson Learning Library, *The Social Styles Handbook: Find Your Comfort Zone and Make People Feel Comfortable with You*. (Herentals, Belgium: Nova Vista Publishing, 2004)

Collins and his coach spent a significant amount of time discussing the principles of social style; the goal was to help Collins develop stronger interpersonal skills and greater social agility—key qualities of strong change leaders. The coach also suggested Collins take an intense, four-day workshop on social styles to learn how to apply the training in managing his workplace relationships.

2 Stakeholder Management: Learning to Leverage Influence through Others

Discussion of social styles and emotional intelligence featured prominently in Collins’s work with his coach; so did discussion of the organizational culture in which he had to operate on a daily basis. Collins and the coach talked extensively about the various stakeholders within corporate headquarters with whom Collins would have to forge relationships. They also discussed strategies for engaging stakeholders, based on the perceived social style of individual process owners.

After completing a “stakeholder profiling” exercise, Collins drew up plans to reach out and build strong relationships with 25 key stakeholders in the organization. One of the things he decided to do was to schedule 90 minute “fence-mending” meetings with 15 of the 25 stakeholders interviewed in the assessment. He traveled to visit the other 10 in the company’s five domestic and foreign offices. In these meetings, Collins reframed his business goals, asked for help in achieving them, outlined directives that had come from the VPs who had charged him to work closely with all of the organization’s process owners, and asked the stakeholders to contribute resources and people to help with implementation efforts.

3 Change Management: Understanding How to Drive Significant Process Change

To be successful Collins had to act as a change agent within his organization—a complex and challenging task. In fact, many organizational change efforts fail because change leaders don’t pay sufficient attention to the multiple variables at play during a transformation initiative and because they run into both overt and covert resistance to change efforts.

During his short tenure in his new position, Collins had run into both kinds of resistance. To help him get a handle on both the political and organizational dynamics at work in corporate headquarters, the coach introduced him to the Burke-Litwin model of organizational change. This model provides leaders with a practical roadmap for driving organizational change by helping them focus change efforts in areas such as mission and strategy, culture, leadership, systems, management practices, and organizational structure. Used adroitly, it can both facilitate and accelerate change by focusing a leader’s time, energy, and efforts in those areas that will yield maximum results.³

Working with his coach, Collins was able to identify several key areas in which to focus his change efforts, thereby helping him prioritize his leadership tasks, align line leaders behind his objectives, and build organization-wide support for his transformation goals.

4 Employing Effective Corporate Communication to Drive Organizational Transformation

Based on a recommendation from the 360° assessment as well as the coaching discussions, Collins decided to use employee communications in a very strategic way to drive employee and process owner alignment with change goals and enlist the support and enthusiasm of frontline employees.⁴ He wisely surmised that the efforts of the company’s “rank and file” would be critically important in helping to drive changes at the “transactional” level. To ensure communications efforts got off to a strong start, Collins asked the organization’s CEO to speak at an employee town hall meeting about the change initiative

³ For a thorough examination of this change management model, see Warner Burke and Bill Trahan (with Richard Koonce), *Business Climate Shifts: Profiles of Change Makers*. (New York, NY, Butterworth-Heinemann, 2000)

⁴ For more on the topic of how to use employee communication as a tool to drive organizational change, see: “Secrets of Top Performers: How Companies with Highly Effective Employee Communication Differentiate Themselves,” Watson Wyatt Worldwide, 2007/2008. This report cites critical connections between specific employee communication practices and strong organizational performance.

he was spearheading. He considered it important that employees see the CEO as solidly behind the change effort, which would give him the necessary credibility and the visibility required for a successful roll-out.

Collins's communications plan also called for regular conference calls with key process owners and working groups in all key departments of the organization as well as the launch of a new internal employee website outlining the goals and objectives of the initiative. Updated weekly, the site provides new information about the initiative, as well as specific milestones reached to date. The site also allows employees to ask questions anonymously about how the change initiative is likely to impact their jobs.

Based on the feedback he had received, Collins decided to institute additional regular "communications outreach" activities, which included:

- a quarterly employee broadcast to all company employees via closed-circuit TV;
- periodic webinars to explain specific elements of the change initiative to different departments and regions; and
- office coffee hours and brown bag lunches to allow employees to get to know Collins and his team.

Some of these activities Collins undertook personally. As he began to staff his office, some of his direct reports also became involved.

Progress Report

Collins was a very successful coachee. He took the input from the 360° assessment—some of it quite "brutal" in its criticism of him—to heart and learned how to adjust his style and approach on the job to achieve success. He met regularly with his coach over a period of nine months and thereafter continued to communicate periodically with him by phone and e-mail.

Don't Forget About "Self Care"!

Leading change is tough, time consuming work that can exhaust the energy and spirit of any leader unless he or she has regular opportunities to be refreshed and restored. To ensure that he would be able to maintain a work-life-balance despite a 70 hour workweek, Collins and his coach drew up an agreement that stipulated that he

- limit travel to two weeks a month;
- build critical down time into his schedule even when out of town;
- work occasionally from his hotel room; and
- avail himself of business travel amenities such as airline clubs and hotel exercise facilities.

Approximately four months after Collins and his coach concluded their formal work, the coach reconvened all the stakeholders interviewed in the initial assessment. The goal was to confirm that they had experienced significant changes in Collins's approach to facilitating change inside the organization. He received high marks from everyone and most felt he had not only enhanced his relationships, but dramatically improved his organizational effectiveness in the process.

Today, nearly three years later, the change initiative Bart Collins spearheaded has dramatically transformed his organization. By all measures, Collins and his boss report he successfully turned early resistance to the change initiative around and built a strong cadre of champions among process owners to keep the effort on track.

Resources

Books

John R. Katzenbach and Douglas K. Smith,
The Wisdom of Teams
(New York: HarperBusiness, 1999)

Donald Krause
The Art of War for Executives
(New York: Penguin Group, 2005)

Otto Kroeger, Janet M. Thuesen, and Hile Rutledge
*Type Talk at Work (Revised): How the 16 Personality
Types Determine Your Success on the Job.*
(New York: Dell Publishing, 2002)

*“Secrets of Top Performers: How Companies
with Highly Effective Employee Communication
Differentiate Themselves.”*
(Watson Wyatt Worldwide, 2008)

Noel Tichy (with Eli Cohen)
*The Leadership Engine: How Winning Companies
Build Leaders at Every Level*
(New York: HarperBusiness, 1997)

Wilson Learning Library, *The Social Styles
Handbook: Find Your Comfort Zone and Make
People Feel Comfortable with You*
(Herentals, Belgium: Nova Vista Publishing, 2004)

Warner Burke and Bill Trahan
Business Climate Shifts: Profiles of Change Makers
(Boston: Butterworth-Heinemann, 2000)

Workshops

Wilson Learning “Building Relationship Versatility™:
Social Styles at Work™”

About the Author

Rick Koonce is president of Richard Koonce Productions, Inc., a multi-service human resources consulting and communications firm based in Brookline, Massachusetts (www.richardkoonce.com).

The Conference Board, Inc., 845 Third Avenue, New York, NY 10022-6600
Tel 212 759 0900 Fax 212 980 7014 www.conference-board.org

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