



**Coach Program for**  
**Ken Sample**  
**Sample Company**

**Anticipated program timing**

**December / 20.. to December / 20..**

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## our coaching philosophy

We believe that coaching should be both collaborative and solution – focused. We utilise resources such as targeted assessments and interviews to help inform a coaching course of action. Once programs have started, we use tools such as the GROW model (Goal Reality Options Wrap-Up) to drive solution – centric conversations in order to facilitate self – directed learning.

For coachees more accustomed to mentoring or training, this can prove frustrating initially as we ask questions when they may be expecting answers. However we will get to the goal and the process will be far more rewarding, the learning far more lasting.

In coaching programs, Company will initiate the program and guide as to background and possible focus areas, however it is the coachee and coach who set the agenda. While Company does not have access to program notes or the specifics of coaching discussions they will be updated periodically on general focus areas and plans of action.

Before embarking on this Coaching Program we interviewed Ken, spoke with the Company HR team, facilitated a number of targeted assessments and considered recent performance reviews, along with considering Ken's resume and the skill set required for the finance field that is his specialisation, within the manufacturing environment.

Ken Sample has nominated himself for a coaching program in order to strengthen his leadership skills, both in managing his team and 'managing up'.

Company's HR team indicated that Ken has an exceptional reputation within Company with high expectations for future senior leadership potential. As part of the performance review process it has been identified that Ken may benefit from coaching, in particular in the areas of delegation and collaboration.

In order to fully inform Ken's coaching program, the following assessments were conducted.

**CPI (California Psychological Inventory) Instrument**

The CPI 434 was done to provide an objective overview of Ken Sample's leadership characteristics. This assessment has five core areas being self-management; organisational capabilities; team building & teamwork; problem solving; and sustaining the vision.

A Coaching Report for Leaders has been generated which will indicate strengths and provide practical suggestions for coaching.

**MBTI (Myers-Briggs Type Instrument) Step II**

Ken completed an MBTI evaluation. This instrument identifies preferences in communication, work style, decision-making and organisation.

An MBTI Coaching Report has been generated for Ken. This will illuminate natural strengths and advantages, while providing some insight into how to manage potential challenges.

**Self-Assessments**

Ken constructed a one - page resume snap shot (see attached). He also used our skills grid and self case study to map out strengths and interests as reflected through his own experience, past performance reviews etc.

**HIGHLIGHTS**

- \* Building successful teams
- \* Strategic vision and management
- \* Building strategic partnerships
- \* Facilitating change
- \* Proactive “can do” attitude \*
- \* Achievement, success and results driven
- \* Problem identification and solving skills

**ACCREDITATIONS & TRAINING**

*Negotiation Skills,  
Skillpath,  
2009*

*M.B.A  
Sydney Uni.  
2004*

*B. Business  
Melbourne Uni.  
1980*

**Ken Sample C.A.****Career Profile**

A proven track record in senior Commercial and Financial Accounting Management positions in large “blue chip” organisations that specialise in manufacturing and fast moving consumer goods. Demonstrable success in business and people management coupled with strong technical expertise.

**Key Skills**

- **Business Management Skills** – Varied experiences building partnerships across multiple business stakeholders and all business functions; highly effective at aligning corporate strategy to specific directives and driving outcomes. Exposure and experience at dealing with all levels of senior management, acting as a business partner and advisor.
- **People Management Skills** – Unquestionable strength with extensive experience leading small to large teams. Currently leading a team of 30 qualified or near qualified Accountants with 4 direct reports. Strong belief in coaching under performers and letting high performers shine. Business values and culture are important factors that drive team engagement.
- **Technical Skills** – Strong mix of financial, commercial and systems knowledge through vast experience and exposure to all business facets. Seen as an expert in financial reporting, forecasting, budgeting, analytical modelling, cash flow management and financial governance.

Commercial Manager	National Foods	10/06 – current
Senior Commercial Analyst	National Foods	12/02 – 10/06
Finance Manager Positions	Amcor	04/89 – 12/02
Management Accountant	Amcor	06/86 – 04/89
Auditor	Ernst & Young	01/81 – 06/86

The common trends for Ken's career satisfaction have included:

- Managing teams
- Mentoring individuals
- Working as part of the leadership group
- Partnering with internal / external customer groups
- Opportunities for learning

The common trends for career frustration for Ken have included:

- Highly politicised work environments
- Very hands on, technical roles over sustained periods of time

The core skills that Ken would like to use in a hands – on capacity, moving forward, are:

- Managing teams
- Working with client groups
- Taking secondments where possible
- More strategic and less hands – on focus

Ken indicated an intention to stay firmly within Finance Management for the foreseeable future, with longer-term aspirations toward more senior roles, heading towards general management positions.

Skill set required for Finance Management:

- Complex problem solving
- Critical thinking
- Active listening
- Reading comprehension
- Judgement and decision making
- Communication
- Coordination
- Management of financial resources
- Management of personnel resources

Skill set required for General Management:

- Complex problem solving
- Judgement & decision making
- Active listening
- Critical thinking
- Communication skills
- Monitoring performance of self and others
- Establishing & maintaining effective interpersonal relationships
- Management of personnel resources
- Management of financial resources

*Skill sets adapted from [www.onetonline.org](http://www.onetonline.org)*

### **Self-Awareness**

Identified through CPI and self assessment

Able to monitor and manage their own feelings and their effect on others, successful leaders can respond to others in an authentic, appropriate and genuine manner.

It is likely that Ken Sample presents as more confident and self assured than the average manager, seen as a dynamic and warm leader. It is also possible that some less confident individuals may perceive him as being self-promoting, self – centred or opportunistic: worth further exploration.

### **Decision Making**

Identified through CPI and MBTI

Effective managers and executives make decisions expediently and take appropriate action. In making their decisions, they take into account a large number of potentially contradictory factors & bits of information, seek & accept the participation of others when appropriate and are not over burdened by the effect of their decisions on others.

Ken tends to be about as willing as other executives to make unpopular decisions. He is likely more confident, assertive and initiating in his decision making than other executives.

He may not be as inclusive, democratic or participatory in his decision making style as others: worth further exploration.

### **Creative Problem Solving**

Identified through CPI, MBTI and self assessment

Effective managers and executives are willing and able to generate creative and innovative ideas and to take calculated risks.

Ken is probably very innovative and imaginative, seen by others as clever and resourceful.

### **Handling Sensitive Problems**

Identified through CPI

Effective managers and executives confront rather than avoid sensitive problems and deliver difficult messages directly.

He seems to be more willing than other executives to confront employees' performance problems and other sensitive issues. He is also probably reasonably sensitive to other peoples' situations and emotional states and readily able to modify the delivery, tone and timing of difficult news.



**Influence**

Identified through CPI

Strong leaders naturally want to influence others and are skilled in doing so. They are generally poised, outgoing and socially and professionally confident with well-developed communication skills that allow them to be persuasive without being overbearing.

Ken seems to be more likely than other executives to seek out and accept roles in which he can have influence over others. He is probably confident and poised in dealing with others, with strong or potentially strong persuasive skills.

Most other people likely experience his influence positively, however some who are less extroverted, confident or assertive may experience him as controlling too much. They may wish he asked more questions and listen more attentively: worth further exploration.

## development areas

### **Capacity for collaboration**

Identified through CPI and self assessment

Aware that the input of diverse ideas can facilitate problem solving, effective leaders welcome the participation of others. They encourage the open discussion of ideas, opinions and suggestions while maintaining a healthy scepticism and keeping the pressure on for results.

This is likely to be an ideal focus area for coaching.

Additionally, the areas of confidence / self-promotion / communication style as outlined in strengths.

## coaching program intent

While Ken was initially looking to coaching to assist with leading a team and 'managing up', the assessments have provided more detailed focus. It is anticipated that this program will undertake to assist Ken Sample with:

- Encouraging collaboration from colleagues and subordinates
- Improving his ability to moderate his communication style
- Creating appropriate opportunities for effective exposure to senior management

These focus areas may be adjusted as progress is made and / or more urgent issues arise, provided that there is agreement from both Ken Sample and Company.

In order to work towards these goals we have agreed to meet on a monthly basis, in a meeting room at Company.

These resources may be useful to Ken both with coaching generally and with the specific focus areas identified.

***CPI 260 Coaching Report for Leaders***, prepared for Ken Sample by CPP

***MBTI Step II Coaching Report***, by CPP

***Introduction To Type And Communication***, Donna Dunning

**O\*Net Summary Report for Chief Executives**

**O\*Net Summary Report for General and Operations Managers**