

AMERICAN PSYCHOLOGICAL ASSOCIATION, SOCIETY FOR HUMAN RESOURCE MANAGEMENT, TEXAS PSYCHOLOGICAL ASSOC.

*Performance Advantage is an applied research and consulting organization in Dallas Texas. Founded in 1991, the company specializes in performance measurement technologies that help explain, predict, and control how people perform on the job.*

### **Performance Coaching Methods/Programs**

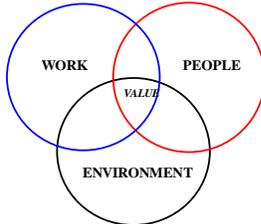
Our expertise in performance measurement is the foundation for our unique, *assessment-based* coaching methods. Instead of relying solely on coaching intuition and experience we compliment these ‘soft insights’ with hard facts based on quantitative assessments. Because we accurately diagnose root causes of performance instead of just treating symptoms, top companies like Nokia and Johnson & Johnson turned to us for answers to their talent management and performance coaching needs. We provide executive level coaching and offer a wide range of training/certification options to teach our proven methods to line managers, HR pros, consulting psychologists, and professional coaches. Our workshops are customized to each client need:

- 1) **Line Managers’ Coaching Workshop** – this 1-day workshop is designed for line managers who need to better coach their employees. It covers a) coaching techniques related to leadership principles, b) tools and methods for diagnosing causes of performance problems, and c) guidelines to facilitate employee self-management. Workshops are preceded by our *Coaching Survey*, a learning needs analysis that allows us to customize each workshop to the specific organization and audience needs. A self-study workbook (or a web-based learning option) is provided to attendees as part of the program. We also provide in-class learning materials and a post-workshop reference guide.
  - Do it yourself Certification: we can certify your internal HR pros to conduct the *Line Manager Coaching Workshop*. A license to use our training materials, assessments, and ‘Coaching Guide’ is modestly priced.
- 2) **Assessment-Based Coaching Workshop** - this 2-day workshop introduces HR pros, professional coaches, and consulting psychologists to assessment tools and methods for performance coaching, teambuilding interventions, self-other awareness training, individual counseling, or diagnosing performance problems. The workshop helps coaches compliment their intuition with quantitative measures of participants’ traits, values, skills and behaviors.
  - Performance Measures and Feedback – the AB Coaching workshop offers instruction for interpreting and facilitating feedback on a broad array of assessment tools including 360 behaviors, personality, skills inventories, values surveys, and other means to explain causes of performance or predict it. We cover factors that influence the choice of assessments plus their validity, reliability and utility in various coaching applications. For clients seeking to start/improve their assessments we provide templates and design advice.
  - HR Internal Consulting – as part of the certification training we instruct attendees on how to make the shift from administrating policy to proactively advising on performance issues. In some of our client companies the AB Coaching workshop became a required course for all HR pros to develop ‘internal consulting skills’
- 3) **7-Step Coaching Process** - this is an advanced coaching certification/training program designed for professional coaches, consulting psychologists, and senior level HR/OD Professionals responsible for executive-level counseling. The course involves classroom training and experiential learning over 3-6 months using multiple learning devices:
  - Assessment Battery - participants complete personality, values, skill, and behavioral assessments in order to 1) learn how to measure causes of job performance, 2) understand human potential using scientific methods, and 3) predict how people will perform in varying work/environmental circumstances.
  - Experiential learning – participants are coached on their own performance in order to learn by experience and active experimentation. This includes observation of role models/mentors, and on the job application Participants graduate after successfully applying the learning to one of their own clients.
  - Discussion and Journal-keeping – Scheduled and open-ended discussions occur throughout the process; participants also keep self-monitored records of insights, discoveries, and changes occurring in the process.
  - Lecture and Reading – short presentations and reading assignments are given on test validation/reliability, personality and motivation theory, psychology of performance and change, assessment-based coaching methodology and other related coaching topics.

Attached are more detailed descriptions of these 3 coaching certification/training programs plus a short bio on the workshop facilitator’s background, education, and expertise in performance measurement. Please note that graduates of our certification programs can continue refining their coaching skills through our global network of consulting psychologists and professional coaches. You are only a phone call away from expert answers to your performance measurement needs, ongoing performance research, plus our continuously expanding inventory of measurement tools and state-of-the-art coaching methods.

## Course Outline (and Workbook Table of Contents)

### 1. COACHING GOAL (Pages 1-5)



A coach's goal is to "Empower employees with the will, ability and opportunity to manage their own performance" ... by helping them gain practical control over the WORK...PEOPLE...and ENVIRONMENT.

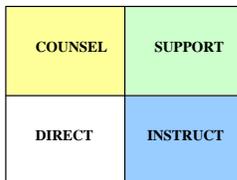
### 2. COACHING PROCESS (Pages 6-9)



COACHING IS AN ONGOING PROCESS OF HELPING EMPLOYEES

- 1) PLAN THEIR OWN PERFORMANCE based on high performer's standards
- 2) MEASURE THEIR OWN PERFORMANCE using quantitative tools/methods
- 3) IMPROVE THEIR OWN PERFORMANCE by focusing on what needs to change

### 3. COACHING ROLES (Pages 10-13)



The effective coach flexes between 4 roles to be what is needed for the situation. They adapt their coaching to fit each employee's Willingness and Ability to perform the work. They learn to 'be what is needed' by learning to Direct, Instruct, Counsel, and Support.

### 4. COACHING SKILLS (Pages 14-32)



**"Basic" Skills** – include Leadership, Communication, Interpersonal, Delegation, Planning-Organizing-Time Management

**"Advanced" Skills** – include Problem Solving, Managing Change, On-Job-Training, Conflict Management, Team Building.

### 5. COACHING VALUES (Pages 33-39)



- 1) Win-Win-Win thinking – for the customer, company and employee
- 2) A Company Is Its People – good coaches develop this resource
- 3) Sharing the Vision – providing a worthy, energizing direction
- 4) Self-Management – by encouraging, engaging, and allowing it
- 5) Integrity – modeling honesty, core values, and good character

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Certification in the AB-Coaching Workshop is intended for **HR professionals and consultants** who want to compliment their intuition and coaching experience with quantitative, fact-based measurements on what causes performance.

## **I) Introduction**

- Performance Concept Models – Normal Curve, WPE, High Performance Target, Success Model
- Why Measure? Going beyond traditional coaching skills/practices with science and facts
- How measures help explain, predict, and better control performance results
- What we can measure and how? Exploring levels of measurement with a vast array of available tools
- Who is qualified to be a "Performance Coach"? Your role as internal performance coach/consultant
- What does the Law say about developmental testing?

## **II) Performance Models – a conceptual framework**

- Performance Pyramid Model (diagnosing causes of performance)
- Interaction of Work-People-Environment
- Coaching for continuous improvement – driving toward self management
- Where to focus your coaching time-effort
- 4 Basic Standards for Performance Coaching
- 10 Golden Rules for Coaches
- Coaching Change – the change curve, inertia and momentum

## **III) Psychology of Performance (understanding the person you coach)**

- Levels of Awareness (Performance-Social-Self)
- Self-Others Awareness and Emotional Intelligence
- Work-related personality measures (examples and applications)
- 3-Faces Model for understanding human nature
- Motivation Theories (9 perspectives in real-world uses)

## **IV) Choosing Assessments**

- Examples of widely used assessments (MBTI, FIRO-B, LEAD-360) for individuals, leaders, and teams
- Interpreting your own Pre-workshop assessments
- Work-related/Validated/Norm-based Personality Assessments (OPQ, Assess, SHRM sponsored tests)

## **IV) Assessment-Based Coaching - Procedural Guidelines**

- Linking work results to causes (360 behavior feedback, Skills assessment, Traits-Preferences)
- How to give constructive, assessment-based feedback in progressive steps
- Setting high standards – using competency Models of top performers' traits, skills and behaviors
- Job-Person Compatibility - coaching for fit and aligning individual genius with tasks-roles-careers
- Mapping performance (from survey data to intervention)
- Success (Performance, Growth, Satisfaction and Well-being) – keeping a holistic perspective

## **V) Performance Measurement in Your Role**

- Q&A on your own performance problems, measurement needs, and coaching issues

*This sample agenda describes some of the topics covered in AB-coaching workshops. We tailor each one to the client organization and/or participants' coaching priorities, so no two are exactly alike.*

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Certification in our *7-Step Coaching Process* is for **advanced coaching practitioners**. It is done in two phases beginning with classroom training in our more basic ‘Assessment-Based Coaching’ program followed by experiential learning on a broad array of performance, personality, values, skills, and other assessment tools, plus a co-facilitated coaching assignment.

## Assessment-Based Coaching Methods - Based on Decades of Applied Research



Professional coaches distinguish themselves from amateurs with

- **Assessment tools and the knowledge to use them**
- **Using scientific methods to assess causes of performance**
- **Change management skills and coaching experience**

Our Assessment-Based Coaching process combined with intensive certification training ensures that our clients get professional coaches with the right tools and skills.

***We don't guess...we measure***

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### HOW THE 7-STEP COACHING PROCESS WORKS

*Step 1: Contracting* – we begin by clarifying required performance results (what the customer, organization, participant, and coach expect), then describe the coaching steps, methods, and roles

*Step 2: WPE Interview* – next we conduct a common sense review of Work-People-Environmental factors that are already known to impact performance and job-person compatibility

*Step 3: Assessment* – in this phase we take quantitative measures of underlying performance causes on 5-levels (traits- motives, attitudes-values, knowledge-skills, behaviors, and work results)

*Step 4: Domains of Genius* – before we intervene on what is wrong we thoroughly investigate what is right about the participant and map these strengths to compatible future Work roles and Environment.

*Step 5: Performance Pyramid* – we next prioritize performance problems revealed by the measures and build a hierarchy of alternative solutions to attack root causes.

*Step 6: Interventions* – the coach, participant, and other organization stakeholders then unite forces to choose optimum development solutions from a matrix of performance problems, causes, and cures.

*Step 7: Self Management* – 7-Step Coaching ends with a rigorous ‘Self-Management’ initiative that leaves the participant with self-monitoring cues and practical ways to prevent regression.

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## INTRODUCING YOUR WORKSHOP FACILITATOR-COACH

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### Background

Jeff Lyons is an organization psychologist and principal of *Performance Advantage*, a research-based consulting firm in Dallas, Texas that specializes in performance management. Jeff's research and consulting practice focuses on performance measurement - the use of scientific methods to better explain, predict, and manage how people perform work in varying environments. Since 1991 he has been applying scientific methods to collect data and analyze the traits, values, skills, and work-related behaviors of high-performing employees – people rated in the top 20% of their job.

He has ongoing contracts with major, global corporations to provide leadership assessment and coaching, plus develop competency models for hiring, training, and coaching. Jeff is the designer and software developer for *Performance Advantage's* measurement systems. Earlier in his career, he was VP Human Resources in charge of HR systems, executive selection and development, and strategic planning. Before that he was an Organization Development consultant specializing in change management, team and leadership development, plus new business start ups and venture/acquisition integration.

### Performance Coaching

Jeff developed and teaches our Assessment-Based Coaching course for consulting psychologists and HR professionals and counsels them on measurement issues in Leadership development, Team facilitation, Coaching, and 360-feedback. He is a "Core Team Member" of senior psychologists advising Nokia's top managers on leadership measures and development; he works under ongoing-contracts to serve executive clients in companies such as Johnson & Johnson, Hitachi and Alcatel. Jeff is frequently asked to consult as a measurement expert on issues related to leadership, coaching, psychological testing, career assessment and counseling, plus performance management systems design, and teambuilding.

Jeff aligns his coaching tools/methods to fit the each client organization's unique culture, values and practices; he similarly flexes his coaching style to be compatible with participants' personality, development needs, and situations, however the following basic principles are consistently applied in every coaching assignment:

- 1) *Focus on Results* - coaching is an investment so aim for practical, here-and-now performance returns.
- 2) *Assessment-based* - what you cannot measure, you cannot fully understand or optimally manage.
- 3) *Domains of Genius* - everyone has underutilized capabilities, interests, and energy waiting to be better used.
- 4) *Partnerships* - coaching is a team effort, so collaborate with participants, managers, and other helpful stakeholders.
- 5) *No Harm Rule* - respect and maintain participants' self-esteem, confidence, and hope at all times.
- 6) *Transfer Ownership* - guide participants into self-discovery and commitment to continuous self-improvement.
- 7) *Be a Catalyst* - the coach is not the solution, rather the enabling agent.
- 8) *Science with Common Sense* - crosscheck your intuition/insights with hard data; if they conflict...trust neither.
- 9) *Always Follow up* – structured coaching events should be accompanied by informal, reoccurring interventions
- 10) *Listen...listen...listen...talk.*

### Performance Consulting - Competency Modeling

As part of his applied research, Jeff developed a scientifically-based competency modeling process that uses multi-level assessments to accurately predict person-job compatibility. The technology was collaboratively developed with, and is now being used by, several leading corporations to hire, train and coach for success.

### Educational Qualifications and Professional Associations

- Ph.D. work in Cognition and Neuroscience at University of Texas at Dallas (completed all but dissertation)
- M.S. Applied Cognition and Neuroscience from UTD
- B.S. Purdue University - Psychology
- American Psychological Association
- Texas Psychological Association
- Society For Human Resource Management (past President of a national award-winning chapter)
- Certified in dozens of ability tests, personality measures, and interpersonal style surveys