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The Coaching Journey- Strawman



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Industry Superfund Executive “Richard has a very structured, practical approach to executive coaching. It made a difference to me knowing that the coach also comes from a business background with hands-on global leadership experience. 3Qetc has a comprehensive suite of tools, frameworks, and surveys that we used; this helped me develop a new awareness of my blind spots and strengths. Over the last 12 months or so, we have shifted the dial considerably on my internal Team engagement as reflected in our engagement scores. Richard also worked with my team, To create a common development language.”

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3Qetc approach to Executive Coaching



Client diagnostic – what are we coaching for? What is the desired focus? Development v Intervention



Chemistry session



3-Way debrief – Aligning the requirements – sponsor, candidate (s), and coach



Pre-work (Strengths, Well-being, 360 context and other tools, assessments as part of the self-audit as required)



Self-Audit



Ten sessions ranging from 1 hour to 1 ½ hours (individuals, pairs, teams)



Check halfway with the sponsor and coachee



Access to corridor coaching



Conclusion- 3-way debrief, measurement, feedback, and next steps.



We provide the coachee with personal handbooks of tools, frameworks, and surveys all accessed online.



We use evidence-based positive psychology in our tools and frameworks.



We review and evaluate with the sponsor and coachee, measure the program and determine the next steps for development.



We co-create & partner through-out the life cycle of the programs



We provide structure, process, measurement, supervision and governance



We provide data , Analytics and benchmarking



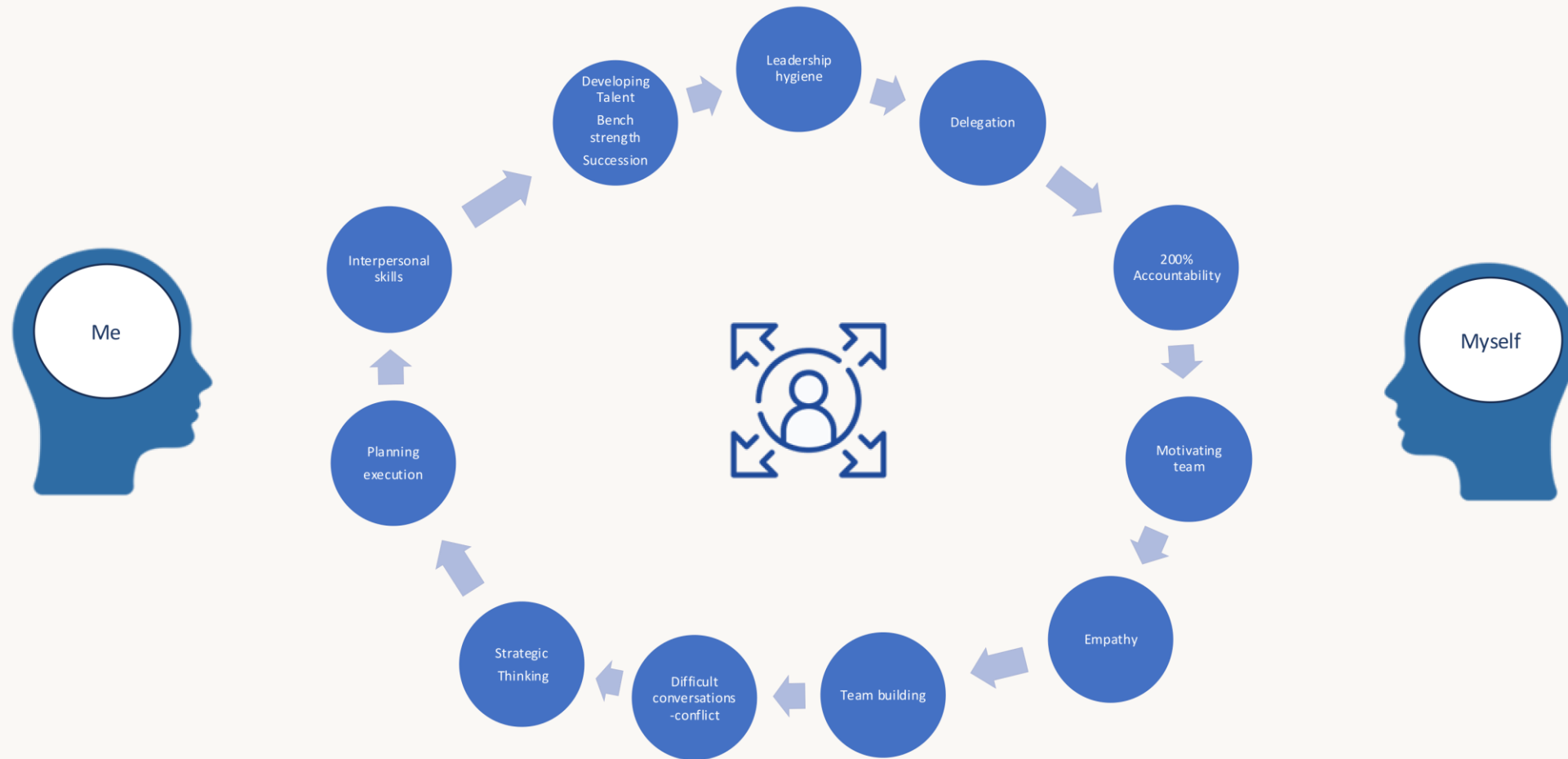
We have a confidentiality agreement with coachee



We provide a Two-way NDA with client

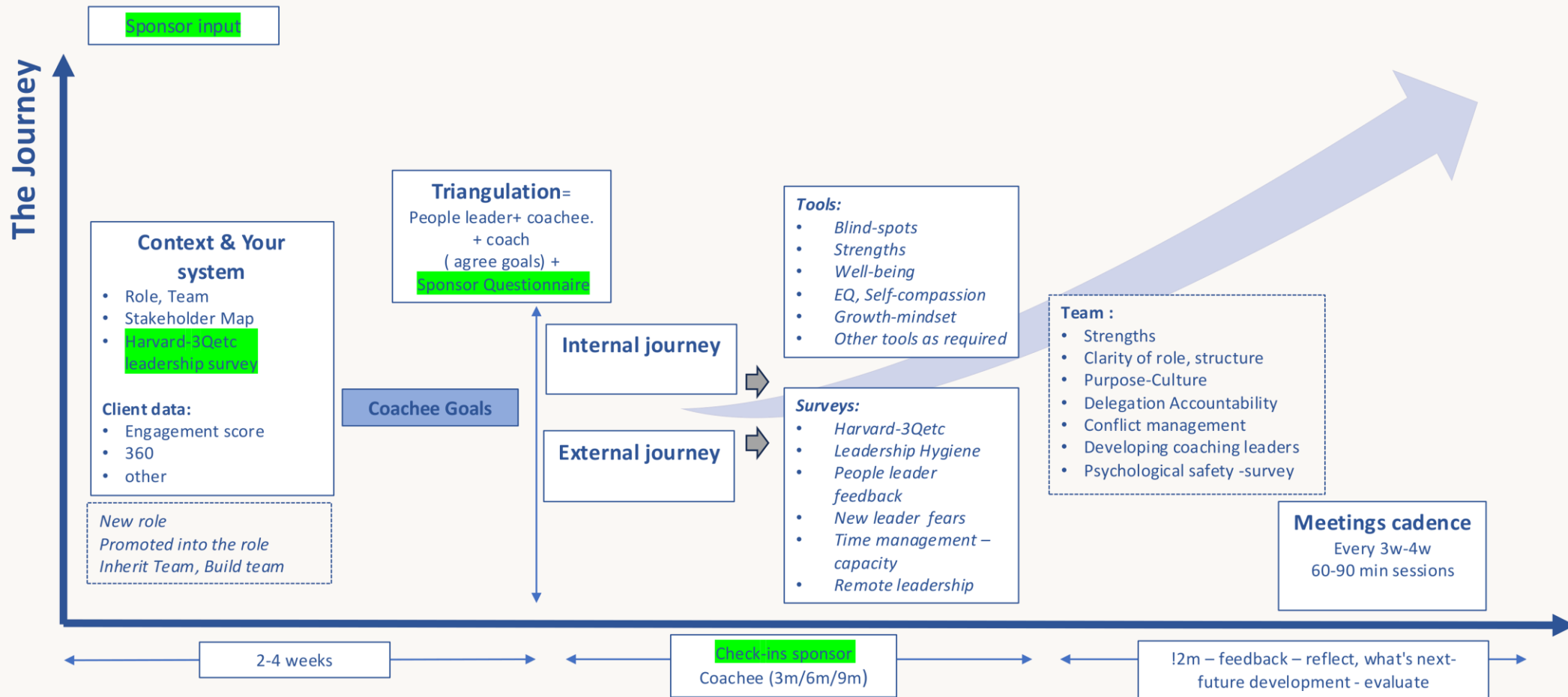
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What do I need to work on?



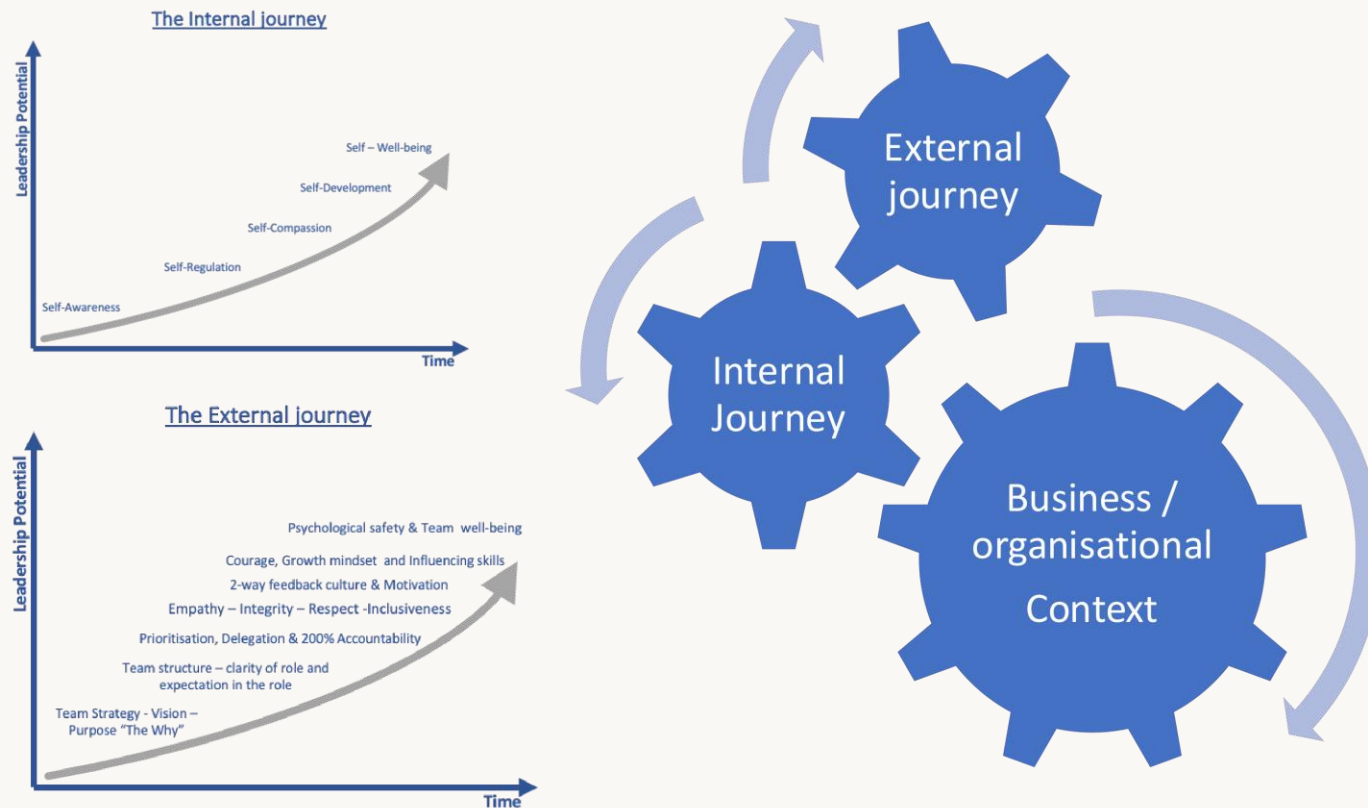
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A co-creation – “Strawman” 12-month coaching Journey



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I.C.E. Internal journey & Context & External Journey Leadership model

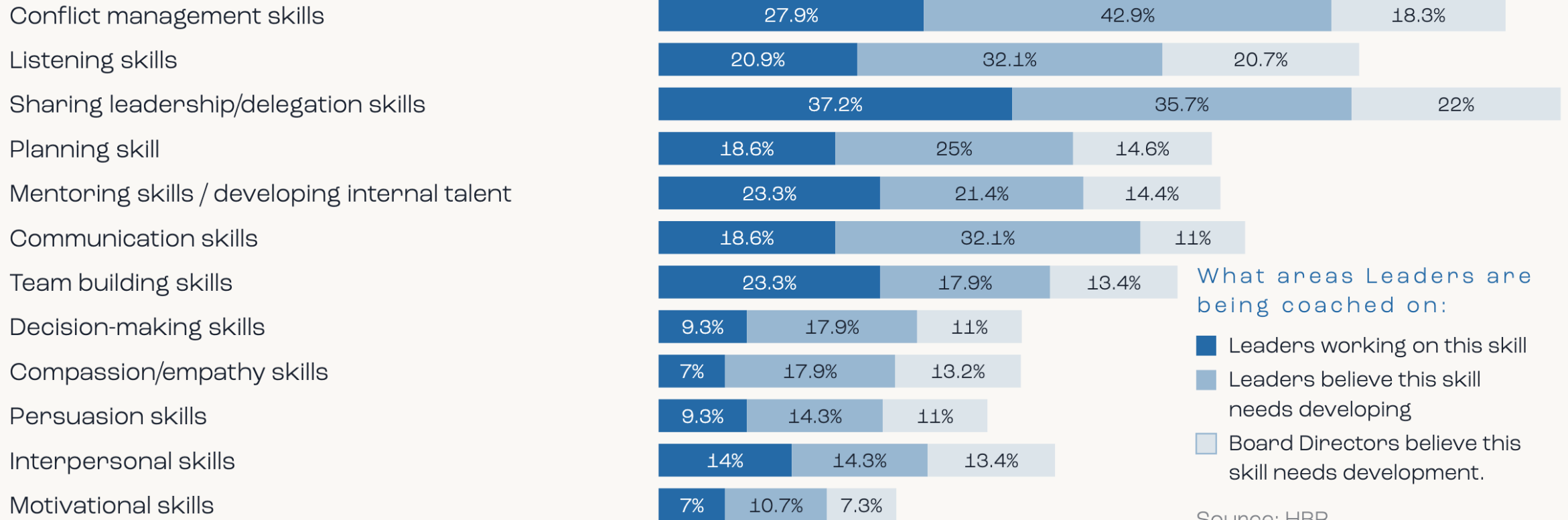


Context

- Organisation's strategy, Vision, purpose "The Why"
- Organisational Culture & Values
- Leadership Hygiene
- On-boarding
- Development – Training
- Collaboration & Innovation
- Internal & External Stakeholder Management
- VUCA environment
- Customers & Clients
- Growth & Performance
- Technology
- Data insights - AI

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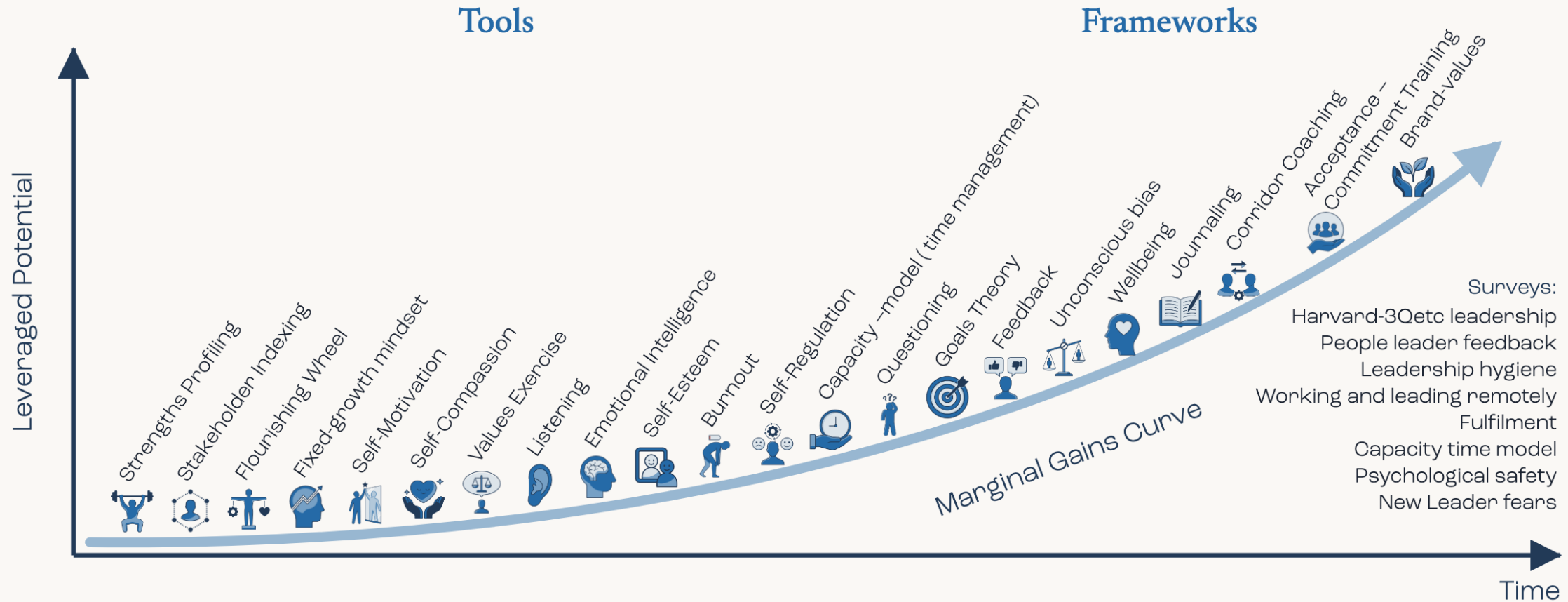
Areas in which Leaders are being coached today (Harvard BR)



Source: HBR

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The Tools, Frameworks & Surveys – compounding effect



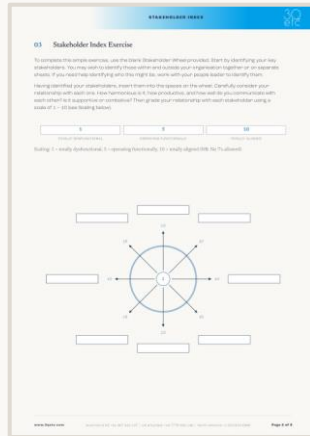
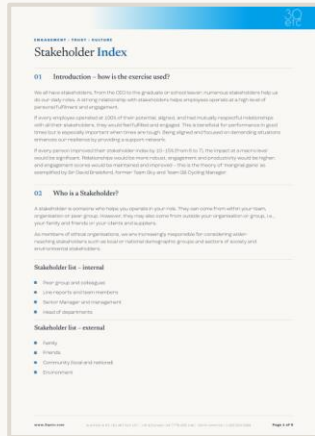
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Resources (online) co-branded

Tools (+Videos 3-5mins))		Frameworks	Surveys
Strengths. (external)	V	Effective Language	Harvard/3Qetc Leadership**
Flourishing wheel.	V	Goal theory	Leadership Hygiene
Stakeholder wheel.	V	Goal approaches and scaling	Capacity time management
Fixed-growth mindset.	V	Listening overview	People Leader feedback**
Emotional intelligence.	V	Feedback	New Leader fears
Motivation	V	Unconscious bias	Working and leading remotely
Self-compassion	V	RE-GROW model	Fulfilment
Self-Esteem	V	ACT (acceptance commitment training)	Psychological safety
Values	V	Journaling	
Burn out	V	Capacity time model – strategic v Management	
Listening	V		
Self-Regulation	V		
Career Map	V		** involve feedback(line Manager and or Team)**

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Resources example – Stakeholder wheel co-branded



Introducing Alison Irons (AI Avatar) from the company development team explaining the stakeholder map exercise (3 minutes). (On 3Qetc website – under resources) (Edit company – to your company name, scripts in videos can edited for your company narrative).

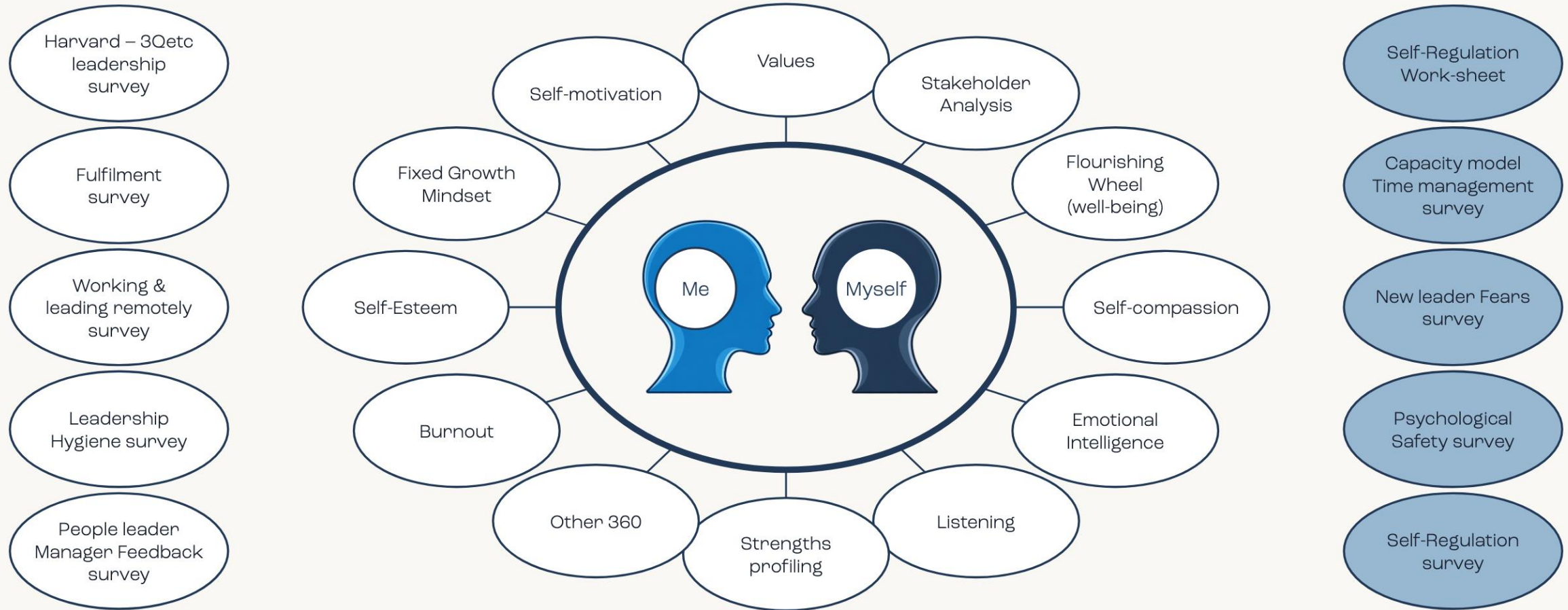
Links:

[Alison Irons - \(3Qetc AI avatar\) Explains the Stakeholder Map](#)

[3Qetc - website and resources](#)

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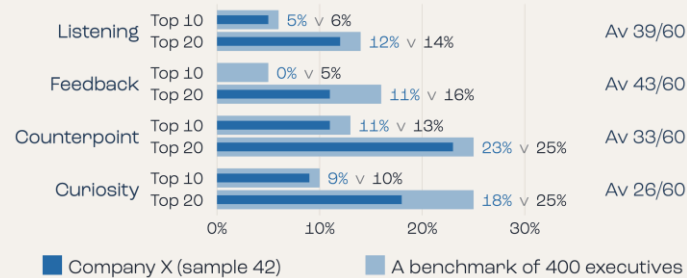
The Full Self-audit



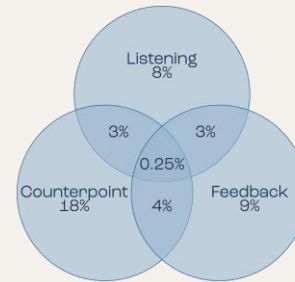
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Our data, analytics & insights

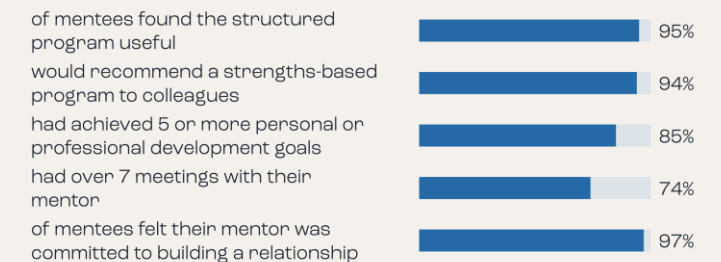
A benchmark of 400 executives V Company X (sample 42)



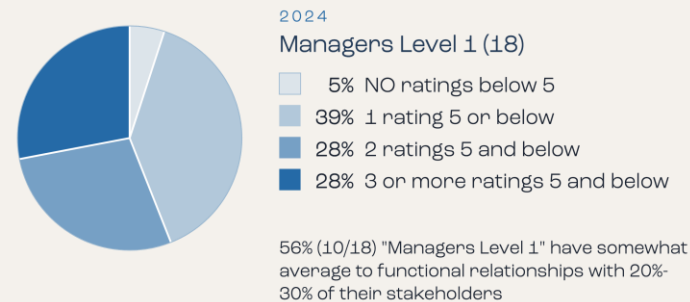
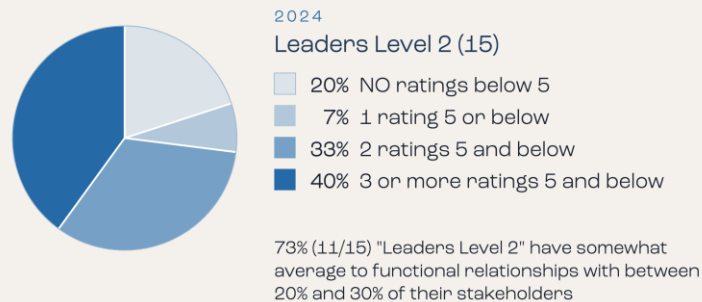
% distribution of participants that had these communication strengths in their top 20 Strengths. Sample size: 400 executives



End of 12-month mentoring program client survey (150 participants)



Stakeholder relationship mapping data



The Leadership Lens: What 39 Leaders Told Us

Insights from 39 leaders following a leadership development program with 1:1 coaching. Exploring performance improvements, business risks and opportunities over the next three years.



The takeaway: Collaboration, leadership and aligned incentives unlock potential.

Scores reflect the relative importance of each theme, not respondent percentages.

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Strengths Survey- High performing teams – Blind spots- 400 executives

CAPPFINITY online strengths test.
60 strengths across four domains
(realised and unrealised
strengths, Learned behaviours
and weaknesses) and split 60
strengths also across five families

- Communicating
- Being
- Motivating
- Relating
- Thinking

Sample:

- 9 Organisations
- 400 Executives
- CEOs, GMs , MDs , Leaders,
- 61% male. 39% female

Conclusion

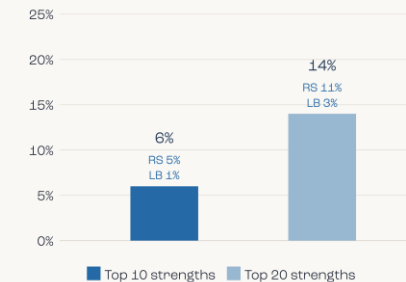
- Observations in the communication family, including listening , feedback, and counterpoint, are extremely poor.
- Implications on the performance of leadership and high-performing teams
- Constructive work to be done on communication, language, and a two-way feedback culture
- Work to be done on the self-awareness of leaders

Opportunity

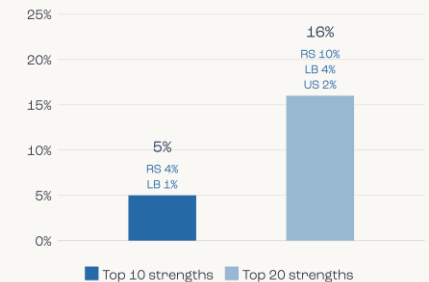
- **Benchmark** is low, therefore, with investment to improve communication skills, we will have the opportunity to a) improve internal engagement, innovation, creativity, performance, and b) improve our external stakeholder engagement with clients, suppliers etc

A sample of 400 executives:

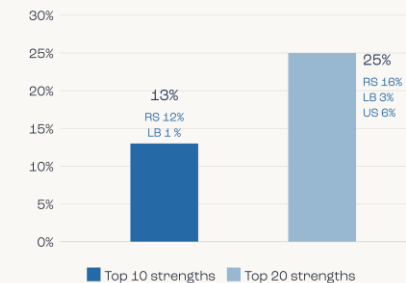
% of Participants with **Listening** in top 10 and 20 listed strengths



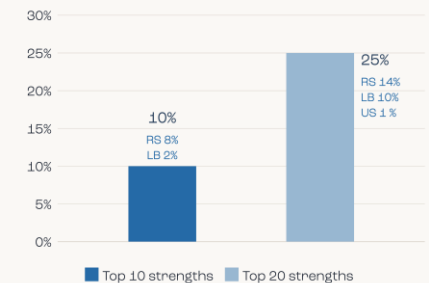
% of Participants with **Feedback** in top 10 and 20 listed strengths



% of Participants with **Counterpoint** in 10 and 20 listed strengths

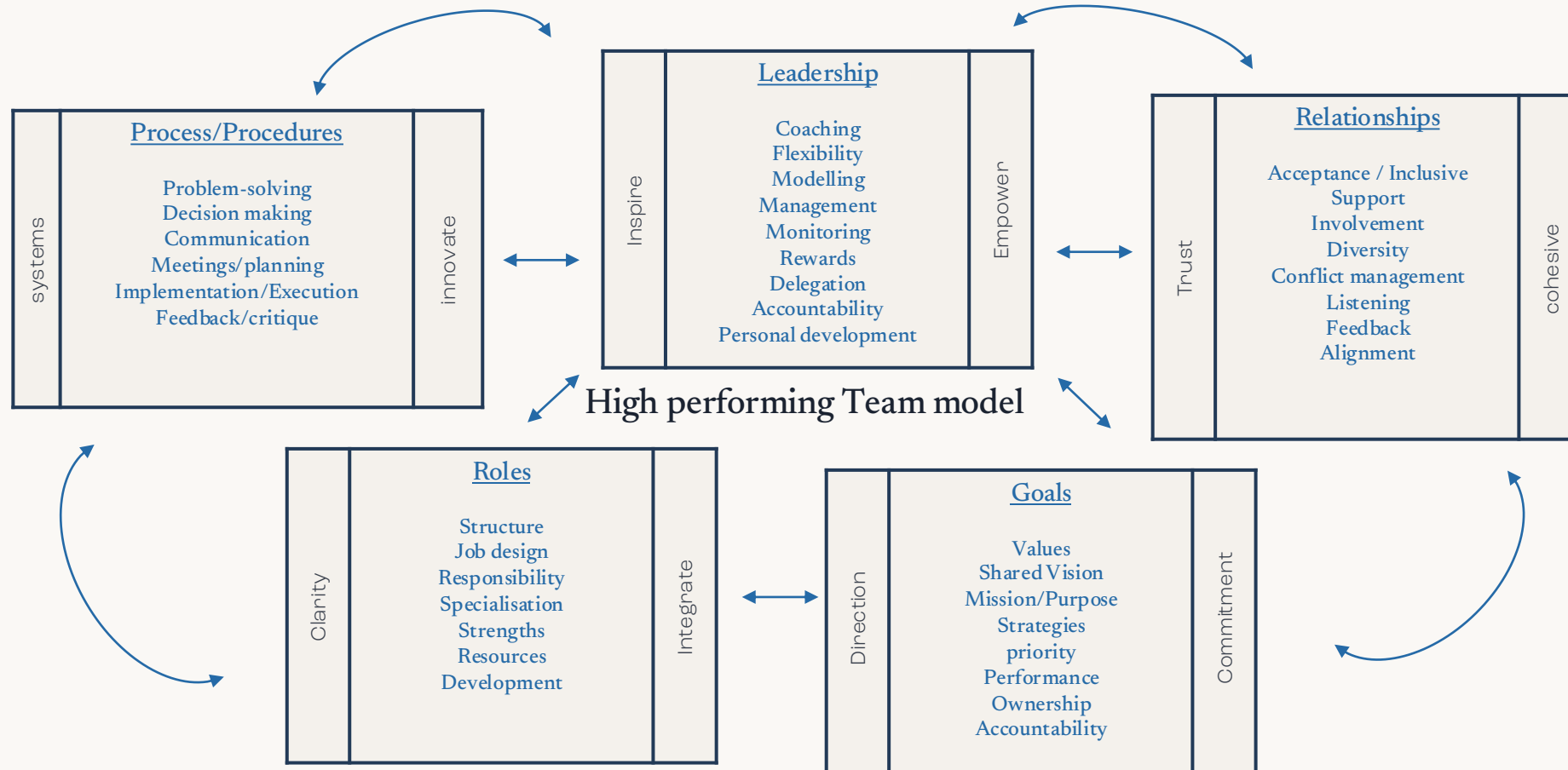


% of Participants with **Curiosity** in top 10 and 20 listed strengths



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Team Development- (example)



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Example Title Criteria (1/7)

Corporate Title Criteria

This matrix outlines the required capability at each corporate title level across eight key areas. The following matrix may be used as a guide when assessing the appropriate title for a new role, candidate or for the Promotions program. For those roles in support functions with a corporate title, please disregard any revenue-focused criteria.

	Associate	Associate Director	Director	Executive Director	Managing Director
Economic contribution	■ Understands the importance of managing both business and reputation risks and their part in doing so. ■ Recognises the need to contain costs and increase revenue. ■ Demonstrates capability to enhance process rather than implement without curiosity.	■ Contributes to and influences business unit revenue generation and profitability. ■ Understands the impact of expense management on organisations bottom line and acts accordingly to minimise expenses. ■ Recognises potential business and reputation risks at an early stage. Communicates and acts to minimise and control these ■ Understands the linkage between the technical expertise they bring and the client's challenges.	■ Is accountable for a specific business sector, trading desk or sales desk ■ Delivers high percentage of revenue and fee generation and delivers above average returns in terms of number of transactions and value of transactions ■ Understands the impact of expenses on organisations bottom line and acts accordingly to minimise expenses ■ Establishes a framework in which business and reputation risk can be identified, assessed and managed	■ Leads the activities for a business, product or function. ■ Sustained business success across multiple clients and product groups ■ Consistent track record of contributing to or generating profits or profit opportunities and managing costs/expenses for the organisation. ■ Proactive success in developing and pursuing new business opportunities ■ Active in improving the organisation; works for the good of the wider group and has a "total Bank" mentality ■ Acts in shareholders' interest ■ Monitors risks on an ongoing basis and seeks to balance potential risks and returns with a strong focus on upholding the Bank's reputation	■ Leads the activities for a major business, product or function. ■ Is a driver of profitability for the organisation and acts in the interest of employees, shareholders, customers and the community.

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Example Title Criteria (2/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Customer Impact	■ May handle matters related to transactions but does not typically handle meetings involving key client contacts ■ Shows an understanding of client needs and how to respond to these.	■ Develops and maintains internal/external client relationships. ■ Uses internal and external network to cross-sell and maximise revenues ■ Capable of executing client requests and meetings	■ Has initiated, developed and maintained excellent internal/external client relationships. ■ Developer of new client/business relationships for the organisation ■ Uses the company network to cross-sell and maximise revenues	■ Develops relationships at the most senior external and internal client levels ■ Strong client focus/influence skills; provides proactive and innovative advice ■ Successfully uses organisations network to cross-sell and maximise revenues ■ Actively identifies and pre-empts customer issues with solutions. ■ High degree of customer intimacy	■ Enhances and promotes the brand and reputation of the organisation in all dealings ■ Develops long term relationships at the most senior external and internal levels ■ Recognised and valued as a thought leader

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Example Title Criteria (3/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Technical expertise	■ Specialisation of skills into a specific role (e.g. relationship management, trading, corporate finance) ■ Is knowledgeable of transaction strategies within assigned area, but does not have the experience required to consistently handle complex transactions independently	■ Applies knowledge in area of specialisation to produce value added results ■ Seasoned in assigned area, independently handles the most complex transactions. ■ Aware of need to improve and maintain skills. ■ Combines commercial relevance with technical expertise to create superior client focused results.	■ Expert professional and technical competence ■ Applies knowledge in area of specialisation to produce “value added” results	■ Expert professional and technical competence ■ Acts as functional expert ■ Applies knowledge in area of specialisation to produce “value added” results ■ Recognised as Industry Leader ■ Constantly looks to improve own professional and technical expertise and has demonstrated success in improving teams’ skill set and others outside business area.	■ Technical expertise comes from proven leadership of complex businesses and is respected for their thought leadership
Strategic perspective	■ Shows a high-level understanding of the firm’s strategy and its impact on the business direction of own team. Actively supports line of business strategy	■ Contributes to the formulation of business strategies ■ Demonstrates a detailed understanding of the firm’s strategy and its impact on the business direction of own team. Uses knowledge of line of business strategy effectively	■ Strongly contributes to defining and developing strategic direction for their part of the business and may be asked to contribute across business units. ■ Sets day to day strategies of department and long-term strategies through liaison with ED	■ Defines and develops strategic direction for their part of the business and ensures congruence with wider organisation and company strategy	■ Plays a major part in the development and execution of the firm’s strategy ■ Drives strategic activities with other areas of the company.

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Example Title Criteria (4/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Partnership	■ Understands why cross business co-operation is important to the firm	■ Actively demonstrates cross business co-operation within the organisation ■ Awareness of how the business strategy supports the organisations strategy ■ Considers opportunities to partner with other business units	■ Creates and/or contributes to a collaborative environment ■ Develops an organisational wide versus a business unit perspective ■ Actively identifies opportunities to partner with other business units ■ Key member of recruitment efforts	■ Consistently employs partnership skills to identify broad business opportunities and work with colleagues in other business areas to deliver client solutions ■ Shares credit with others for their contributions ■ Makes business decisions that support the wider strategy ■ Pursues opportunities to partner with other business units outside of the division and raises awareness of cross-team initiatives	■ Capably manages and establishes external and internal partnerships that drive the overall organisational strategy ■ Drives the division strategy initiatives through raising awareness and engaging other business leaders to focus on key strategic opportunities ■ Maintains relationships with other business leaders outside of the division in order to maximise cross sell opportunities

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Example Title Criteria (5/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Leadership	■ Displays appropriate work behaviours and values – Lead by example and is accessible to colleagues. ■ Understands and ensures compliance with appropriate people policies/procedures for the team. This includes internal or external people requirements e.g. OH&S, The wider Group Policies and Guidelines, Harassment and Discrimination ■ Looks for opportunities to take on new work/projects ■ Understands and implements business plans by establishing relevant goals/objectives for team ■ Understands own responsibilities and where personal and team accountability rest	For Associate Director and Director titles, the following criteria apply in addition to those listed for Senior Associate: ■ Identifies and develops talent to grow the business and build organisational capability through a diverse work force and inclusive thought ■ Translates business plans and direction into actions that are easily understood by the team ■ Effectively manages team members. Rewards appropriate behaviours and positive results and provides guidance to those requiring further development ■ Is a positive role model for others ■ Identifies and proactively takes up opportunities to lead projects and initiatives within own team and across the organisation ■ Actively seeks out opportunities to provide input into business initiatives aimed at developing the capability of and streamlining organisational processes ■ Create a coaching leadership style: "a developer of people"		For Executive Director and Managing Director titles, the following criteria apply in addition to those listed for below ED titles: ■ Builds organisational capability through effective people strategies that enhance the business and leverages a diverse workforce and inclusive thought. ■ Understands the business value of diverse teams and drives this capability ■ Clearly communicates the future direction of the organisation and own area of responsibility ■ Is a positive role model for The Group's organisational and management values ■ Rewards appropriate behaviours and positive results ■ Coaches, leads and empowers effective teams to develop and implement key organisational strategies. ■ (Fosters a "One Team" approach) ■ Drives strategies to develop and increase new business ■ Inspires and engages staff at all levels ■ Is passionate and committed about their role and the organisation ■ Drives effective communication within own team and in cross-functional, organisational teams ■ A champion who adapts and builds resilience in new or difficult situations ■ Provides thought leadership on new or significant areas of business interest both within and outside their area of functional expertise ■ A strategist who earns business, is visionary and seizes and develops opportunities ■ Proactively leads and manages change	

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Example Title Criteria (6/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Coaching	■ Builds an understanding of the concept of coaching. ■ Establishes trust by creating a safe, supportive environment that produces mutual respect and trust ■ Demonstrates active listening by focusing on what the person is saying to understand the real meaning of the discussion ■ Uses direct communication to communicate effectively during coaching sessions. Uses language that creates a positive impact on the Customer ■ Defines development goals and plans by creating opportunities for on-going learning during coaching and in work/life situations ■ Tailors approach to the individual requirements of the person/people receiving the coaching	For Associate Director and Director titles, the following criteria apply in addition to those listed for Senior Associate: ■ Can identify the specific coaching needs of an individual and outline the coaching process and relationship. ■ Asks open questions that reveal the information required to maintain an effective coaching relationship ■ Manages progress and accountability by reviewing and refocusing the person on objectives while leaving the individual responsible for taking personal action. ■ Alters coaching approach as required to meet the needs of the individual ■ Understands the importance coaching plays in developing the capability of the organisations resources. Is actively involved as a coach and promotes the concept of coaching to others ■ Creates a personal sense of self-awareness and self-regulation and pursues self-development ■ Encourages appropriate feedback both up and down the organisation		For Executive Director and Managing Director titles, the following criteria apply in addition to those listed for below ED titles: ■ Creates awareness of behaviours by evaluating multiple sources of information and observations and provides guidance to help the individual gain awareness ■ Supports and encourages the individual to work toward achieving goals and objectives ■ Supports and promotes the concept of coaching throughout the business ■ Actively coaches’ individuals at all levels within the organisation ■ Is respected by others as an effective coach both within and outside own team/BU ■ Seeks personal guidance from more senior peers as mentors or coaches	

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Example Title Criteria (7/7)

	Associate	Associate Director	Director	Executive Director	Managing Director
Values	■ Acts with integrity in all dealings ■ Delivers on promises ■ Demonstrates drive, initiative and resilience to do best work and find better ways to do work tasks ■ Builds and sustain strong working relationships ■ Listens openly to others, respecting their views, ideas and experiences. ■ Considers the implications/consequences of actions and decisions ■ Complies with all organisational policies and processes	For Associate Director and Director titles, the following criteria apply in addition to those listed for Senior Associate: ■ Makes commercial decisions based on analysis, experience and judgement ■ Provides support for team members to have constructive conversations and work effectively together ■ Engages the team to find innovative ways to achieve their objectives ■ Collaborates across teams to share ideas and achieve great outcomes ■ Draws upon the difference within teams to capitalise on diversity in style and approach ■ Understands and reinforces the message that risk is the responsibility of all staff in the organisation and considers the risk implications/consequences of actions and decisions ■ Role models the values of the organisation		The following criteria apply in addition to those listed for below Executive Director level: ■ Delivers results in line with Business Unit strategy, balancing short- and long-term issues and business complexities ■ Promotes an environment where people can take action and learn from their experience ■ Translates the vision into meaningful stretch goals and engage others to achieve them ■ Sustains relationships across business units to share ideas, streamline processes and achieve synergies ■ Builds an environment of trust and openness that values diverse views and styles ■ Drives and supports the promotion of a diverse and inclusive culture	The following criteria apply in addition to those listed for below Managing Director level: ■ Promotes a culture that inspires trust and confidence ■ Effectively resolves organisation-wide issues to sustain focus on key strategic deliverables ■ Creates and sustains a vision and culture of continuous improvement where people strive for success ■ Collaborates across the organisation to initiate and deliver organisation-wide solutions that enhance the companies Group's market position ■ Promotes an environment that enables a diverse workforce to reach its full potential. ■ Creates inclusive work environment by evolving and providing access to progressive work/life and flexibility practices. ■ Creates opportunities for increased dialogue and profile on diversity and inclusive thought