

COACHING A CASE STUDY

Strengthening leadership and sustained
behaviour change with a focus on
learning agility

A global lead generation company engaged The Work Psychologists (TWP) to deliver a coaching programme to 28 Emerging Leaders. Our client was aiming for a high growth trajectory exit via IPO / trade sale and needed this population to gain a deeper self-awareness around their leadership and begin to shape strategy themselves.

The programme offered individualised coaching to help them develop greater learning agility, build upon their strengths and identify and develop their blind spots. It involved 11 TWP coaches across the UK, Europe and US over a 15 month period.

WINNER



WINNER

recognising excellence in business psychology



THE CHALLENGE



The Emerging leaders (Board-1) leaders were a population who had experienced little leadership development or formal training, many of whom had grown up through the organisation without external experience (70% with tenure of 6yrs +). Our client had identified that generally they were lacking in self-awareness and emotional maturity around their leadership strengths and development areas, and an appreciation of what was needed to both develop themselves to Board level, directing strategy and leading effectively within a VUCA world.

This coaching project formed part of a Leadership Development Academy (LDA). The aim of the LDA was to:

- ▶ Build awareness around their strengths and development areas through a personality psychometric (Hogan), a learning agility assessment (Learning Agility Inventory) and a verbal 360 feedback exercise.
- ▶ Have coaches work with the leaders on a bespoke basis for 12 months to build learning agility and provide individualised development with a view to improving leadership performance and business impact. Learning agility had been agreed with our client as key to developing leadership potential (De Meuse, 2017) and particularly important in VUCA times as learning agile leaders are more likely to be curious, seek out stretching assignments, adapt their behaviour and tend to be resilient in coping with setbacks (Dragoni et al 2010)
- ▶ Gather thematic feedback at an organisational level regarding organisational blockers or future interventions in LDA Phase 2.

In terms of stakeholder engagement, the CPO engaged with the Executive Board upon a number of occasions to build their engagement with the project. LDA had already been modelled at Board level who had been through a similar process using Hogan profiling and verbal 360s to improve self-awareness before roll-out of coaching to all Board members (although learning agility had not previously been measured for the Board).

LDA participants were engaged with a presentation explaining the journey that the Board had been on, the 'why' of leadership, the difference between leadership and management and training, and how the LDA would be managed. This was a large investment, and the emerging leaders' contribution was their training budget with a commitment to the 12-month programme backed up with a financial incentive to see the program through. This ensured that participants had full information to consider their motivations to engage in the LDA before it began.

OUR APPROACH



The objective of the LDA was to develop greater learning agility and enable the emerging leaders to build upon their strengths and identify and develop blind spots. To achieve this, TWP co-created a project plan consisting of the following milestones.

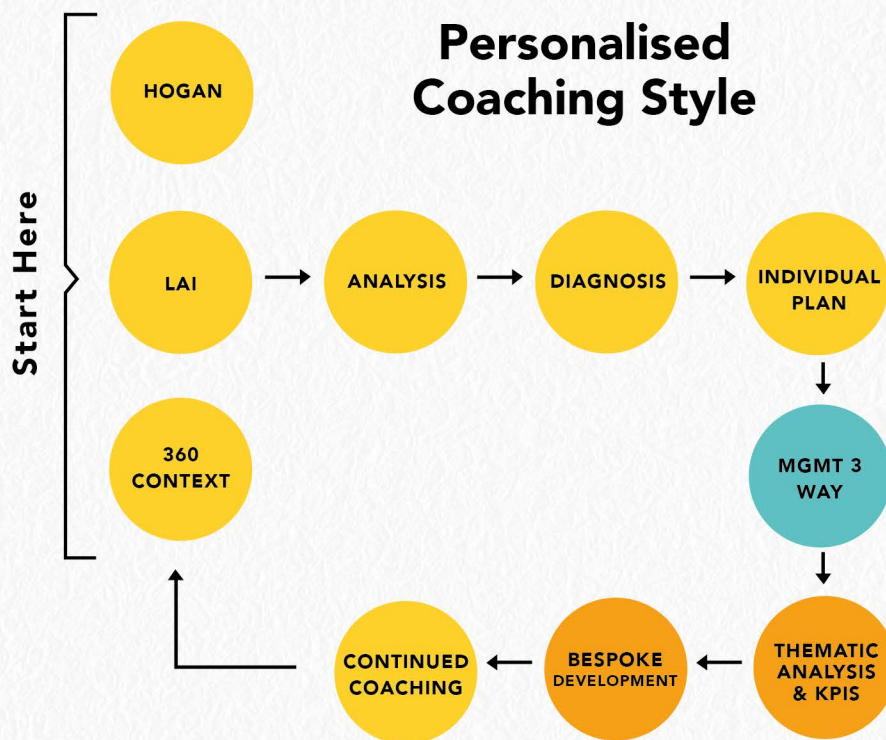
Initial diagnostic phase encompassing:

- ▶ Coach/coachee contracting;
- ▶ Hogan;
- ▶ Burke Learning Agility Inventory (LAI); and
- ▶ Verbal 360 feedback using a structured interview approach. Best practise 360 guidelines were followed. Participants nominated 5 people including their manager, a peer they worked with regularly, a direct report, and someone that they would like to improve relationships with to ensure a variety of data points were included.

This phase was designed to frame the project, answer coachee questions, build rapport between the coaches and coachees and identify the coachees' strengths and blind spots. It was followed by the following steps:

- 1 Co-creation of Personal Development Plans (PDPs)** - coach, coachee and line manager were involved. This document enabled coachees to set SMART objectives, identify what support was needed and how they would measure progress.
- 2 Thematic analysis** - using a structured survey TWP collected data from our coaches and fed back group level findings to the CPO. Using this information we could reflect on the goals and expectations as the project progressed and agree next steps for the remainder of Phase 1 of the project.
- 3 9 months of individual coaching** - using the initial diagnostic phase data, PDPs and KPIs as a framework to work towards the project objectives.
- 4 LAI repeated.**
- 5 Final thematic feedback to the client.**

CREATING EFFECTIVE & SUSTAINABLE BEHAVIOUR CHANGE



To ensure the coaching programme created effective & sustainable behaviour change, TWP applied:

- ▶ Koroleva's (2016) model of sustainable change in executive coaching.
- ▶ Literature review by Bozer & Jones (2018) into factors determining workplace coaching effectiveness.
- ▶ Study by Bickerich & Michel (2016) into characteristics key to facilitating effective executive coaching.

We addressed the elements of Koroleva's model as follows:

- 1 Coachee's attitude:** Participants were well introduced and briefed on the purpose and aims of the LDA, and were offered the opportunity to opt out, with no questions asked, if they preferred not to commit to it.
- 2 Resources:** Individualised coaching sessions allowed participants space and time to step away from their jobs. Sessions were a mixture of face to face and virtual depending on the participant's wishes. The diagnostic phase provided both richness and depth through extensive feedback and three-way conversations with line managers
- 3 Routinisation:** The 12-month coaching period enabled participants plenty of opportunity to practise their new behaviours or reflections.



Koroleva (2016): A visual representation of model of sustainable change in executive coaching.

Building on this evidence-based approach, to ensure maximisation of coaching effectiveness, the LDA also addressed the following factors identified in the literature:

- ▶ **Motivation:** Participants' motivation was quantified after the diagnostic phase by both the coaches and the coachees. For those participants with mid/lower ratings, a course of action with the client was agreed.
- ▶ **Trust & Coach Interpersonal Attraction:** Coach matching was completed between TWP and the CPO based on their respective knowledge of the participants and coaches. After the diagnostic phase all participants had the option to move to a new coach - 96% opted to stay with existing coaches. Trust measures suggested that 79% of participants trusted their coach enough to be vulnerable, exploring their weaknesses and limitations at the start of the programme, rising to 95% by the end of the programme.
- ▶ **Feedback intervention:** Verbal 360 and feedback on psychometrics during the diagnostic phase allowed participants to build self-awareness in a safe and personalised space to offset any negative implications.
- ▶ **Supervisor support:** The involvement of managers in a goal setting conversation took place at the end of the diagnostic phase. 78% of participants felt that there was clear alignment with their manager at this stage.
- ▶ **Goal orientation:** Initial LAI measure allowed coaches to understand participant's goal orientation and level of mindset flexibility so they could tailor coaching accordingly, addressing deeper seated fixed/rigid mindset beliefs where relevant.

OUTCOME EVALUATION



Success in achieving project objectives was determined by systematically gathering evidence of impact and enhanced performance. Source was CPO feedback and participant surveys (qualitative & quantitative) 3-months into LDA and at end of Phase 1.

Reactions:

- ▶ 100% recommended working with their coach to others at their firm
- ▶ 100% of people wanted to continue leadership development beyond Phase 1- LDA – 87% wanted to continue 121 coaching over group workshops.

Comments:

"This has been the best L&D exercise I've done here in 9 years and fundamental to keeping me motivated & performing
"The ability to have L&D focused thought-provoking conversations was highly motivating"

Learnings:

- ▶ Retrospective self-awareness increased amongst participants around strengths & development areas: 53% at start to 84% at end of programme.
- ▶ 95% believed that their leadership skills had improved due to the coaching programme.
- ▶ TWP were able to feedback key organisational themes affecting participants' development at 6-month intervals to our client – including coaches' views on what would be most valuable to each participant during Phase 2 .

Comments:

"I have given the team more autonomy & room to make mistakes (and learn from them)."
"I have got closer to giving & receiving feedback in the moment - for example, I've become much better at telling my boss how I feel in meetings even if this has led to occasions where we disagreed"

Impact & Results:

Impact & results were measured at the end of the programme. Growth overall within the business was negatively affected by a market downturn and owing to restructuring and CEO departure in April/May 2023 TWP were unable to ask for repeat 360-feedback on participants. However, participants were asked to rate:

- ▶ **Financial impact:** Improvements in leadership translating into KPIs at work – 58% rated positively.
- ▶ **Clients/Culture impact:** Improvements in leadership effectiveness having a positive effect on internal or external clients/stakeholders – 95% rated positively.
- ▶ Progress against PDP goals set in summer 2022 – 78% of coachees rated positively.

Comments:

"I think it's improved team morale & togetherness."
"KPI's have improved dramatically over the last 6 months in almost every area.
We have delivered record revenue & contribution over 3 months"
"All my team members have stayed, outperformed their KPIs & progressed in their roles.
whilst enjoying their jobs, the process & fast growth"

BEHAVIOUR CHANGE & INNOVATION

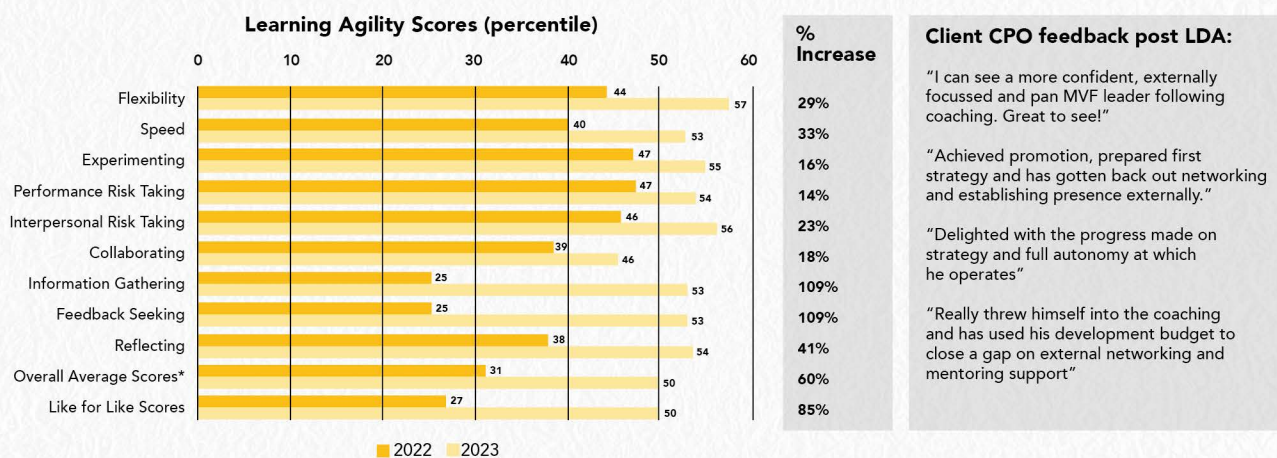
Behaviours:

Behaviour change was measured at the start & end of LDA Phase 1 using LAI as a behavioural measure.

- ▶ June 2022: Overall average score 31st percentile
Reflecting dips in feedback seeking and external information awareness (n=29) as identified by CPO.
- ▶ June 2023: Overall average increased to 50th percentile (+60%) (n=18) & like-for-like average score increased from 27th to 50th percentile (+85%).

Areas of greatest increase in feedback seeking and external information awareness (+109%) reflecting a noted tendency of participants to ask for feedback and gather external sources of market awareness.

A Wilcoxon signed-rank test on overall average scores showed that there was a significant increase in Learning Agility in individuals between 2022 (M=26.94; SD=14.28), and 2023 (M=49.83; SD=29.17); (Z = -2.90, p = .004). Cohen's d effect size was 0.99 which is large but should be interpreted with caution as sample small and samples weren't normally distributed.



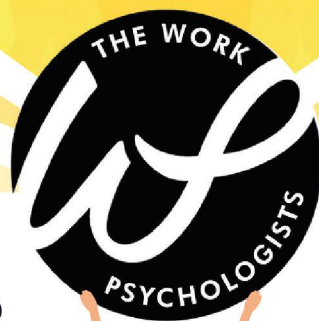
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Innovation:

Amidst a disruptive business environment, the LDA was deliberately developmental and addresses the additive power of learning agility as a measurement of behavioural change in coaching (Harvey & Valerio 2022).

From our own previous TWP research (Last 2022), few coachees experience any measurement / feedback following coaching interventions. Through this programme we fostered a focus on learning agility, a critical edge in this era of flux. Our assessments depict a significant rise in this 'X-factor', empowering leaders to navigate complexities, rapidly assimilate insights, and decide effectively, embracing a 'future focused & agile' mindset.

THANK YOU



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