

“I Opt”®

(Input Output Processing Template)

Advanced Leadership



This report has been prepared for:
Corporate Officer

A composite of 182 corporate executives including 49 CEOs, 8 Subsidiary Presidents, 4 Managing Partners, 11 Executive VPs, 5 Senior VPs, 5 VP General Managers, 10 VPs with Corporate titles (e.g., CFO, General Counsel, etc.) with the balance being VPs heading various operations (e.g., Divisions, R&D, Sales, Operations, etc.).

ADVANCED LEADERSHIP COACHING REPORT

EXPLANATION OF INFORMATION PROCESSING

PAGE i of Corporate Officer Report

BACKGROUND:

These are the information-processing factors that drive the behaviors identified in the Advanced Leadership Report.

- Method refers to the way Corporate takes in information. An “unpatterned” strategy means that Corporate will tend to use anything at hand that seems to apply to the issue being addressed.

This strategy contrasts to one where a person creates or selects from well thought out methods of addressing an issue. These kinds of people would be using a “structured” strategy. Corporate also has access to this approach on a secondary basis.

- Mode refers to what Corporate tends to output as behavior. A thought-oriented, idea generating strategy (RI) tends to be favored. This creates a perceptible excitement that is likely to be shared by the group being lead.

Corporate also uses an action-oriented RS style as a secondary strategy. When this combines with the primary idea-oriented RI strategy and a “Great idea! Let’s give it a try.” posture is created.

EXPLAIN:

- This strategy is suitable for some activities and not for others. For example, Corporate is not a person who we would want running a nuclear plant down the street. In running a nuclear reactor, sustained attention to detail and rigorously following established procedures would be valued. While these qualities are available to Corporate, it is unlikely that Corporate could resist attempting something new or applying an expedient fix over the long run. It is likely that Corporate would find the job satisfying and would sooner or later slip—with potentially serious consequences.
- One of the goals of the Advanced Leadership Report is to help Corporate mesh this strategy with the others needed to successfully address the various issues that are faced in the conduct of business affairs.

Leadership Report Summary	
What do I get? Summary	
An information-processing style showing an action orientation, communication and employing requirements.	
Method refers to the way Corporate takes in information. An “unpatterned” strategy means that Corporate will tend to use anything at hand that seems to apply to the issue being addressed.	
Mode refers to what Corporate tends to output as behavior. A thought-oriented, idea generating strategy (RI) tends to be favored. This creates a perceptible excitement that is likely to be shared by the group being lead.	
Corporate also uses an action-oriented RS style as a secondary strategy. When this combines with the primary idea-oriented RI strategy and a “Great idea! Let’s give it a try.” posture is created.	
View Secondary Leadership Style Indicators	4
What does your secondary leadership style indicate for you about your “style” needs and expectations?	
View Leadership Style Elements	5
A reference to use secondary to understand the theory management approach to address an existing issue, performance related considerations, set of strategy alternatives, related resources and a potential action approach for able to be used if needed.	
View Leadership Pattern	6
A general reference to the “change” pattern with secondary values under “Indicators” pattern.	
View Leadership Style Values/abilities	8
Focus on the ability, disposition, motivation, and behavioral patterns.	
View Leadership Style Strengths	8
What are your strengths, capabilities, assets, abilities, skills, resources, and style?	
Leadership/Behavioral Dimensions of your Group	10
Supportive to workgroup activities group members of different types.	
Leadership/Behavioral Dimensions of your Self	11
Supportive to workgroup activities group members of different types.	
Leadership/Behavioral Dimensions of your Self	12
Supportive to workgroup activities group members of different types.	
Conclusion	14
Discussion leadership activities and how to use the report.	
Report for Self	Page 1

ADVANCED LEADERSHIP COACHING REPORT

LIMITS OF THE REPORT

PAGE 1 of Corporate Officer Report



EXPLAIN:

- Information processing is not everything. Other factors can and do influence behavior. Education, experience, upbringing and other factors do count in setting behavior.
- Some of these other influences will come out in the coaching conversation.
- However, information processing does supply a general “framework” within which these other factors play out.

EXAMPLE:

- Even when working on an issue that could be resolved by new ideas, Corporate may hesitate if there had been negative outcomes on similar issues in the past. Experience as well as styles influence behavior. This aspect of behavior can be addressed in the coaching interaction.

ADVANCED LEADERSHIP COACHING REPORT

DISTRIBUTION OF STYLES

PAGE 2 of Corporate Officer Report



EXPLAIN:

This paragraph refers only to the primary style. Everyone can use all of the styles. This is just the one that Corporate favors most. It is also the one most likely to be associated with Corporate by others.

- **SAY** that most of the people in the world do **NOT** use the RI (new ideas) approach as their basic way of navigating life.
- **SHOW** the Distribution of Strategic Styles graphic on the next page.

BACKGROUND FOR STYLE DISTRIBUTION GRAPHIC (Next Page):

The distribution draws on all levels (CEO to janitor) in all types of organizations (profit, non-profit, government, military, municipalities, agencies, etc.).

Other people are likely to see the idea-oriented RI strategy as Corporate's overall preference. The fact that they may not share the same approach may make Corporate's preference stand out more vividly.

ASK:

How many people in the group being lead share Corporate's orientation toward new, often groundbreaking, ideas (RI) when addressing an issue?

BACKGROUND FOR QUESTION:

The question is designed to help reinforce that not all people share Corporate's approach.

One goal of organization is a mix of people who cover all of the bases involved in the mission of the group.

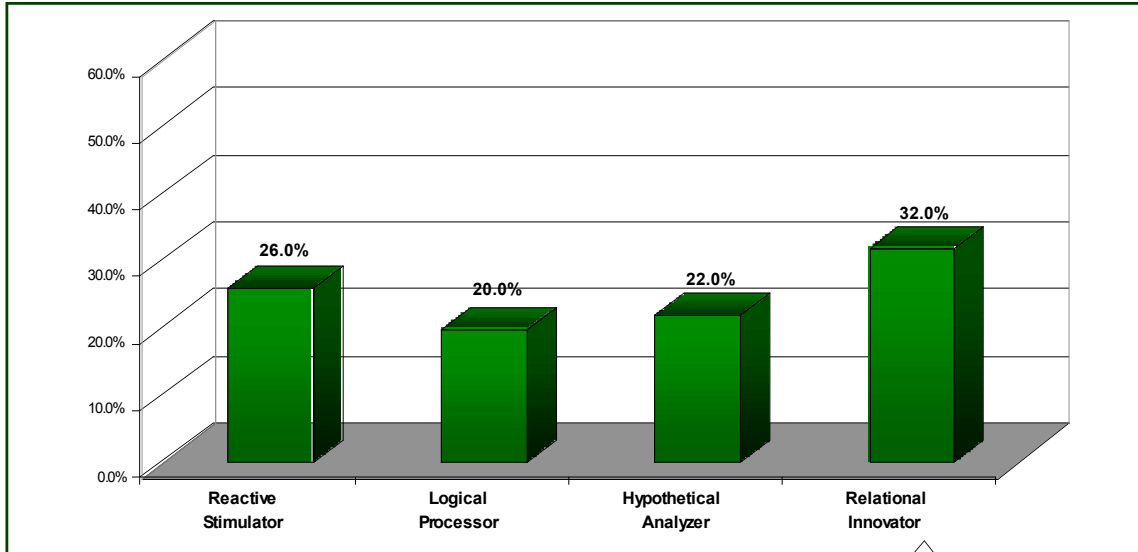
Potential follow-up question:

Do these other people cover bases that you do not want to cover yourself?

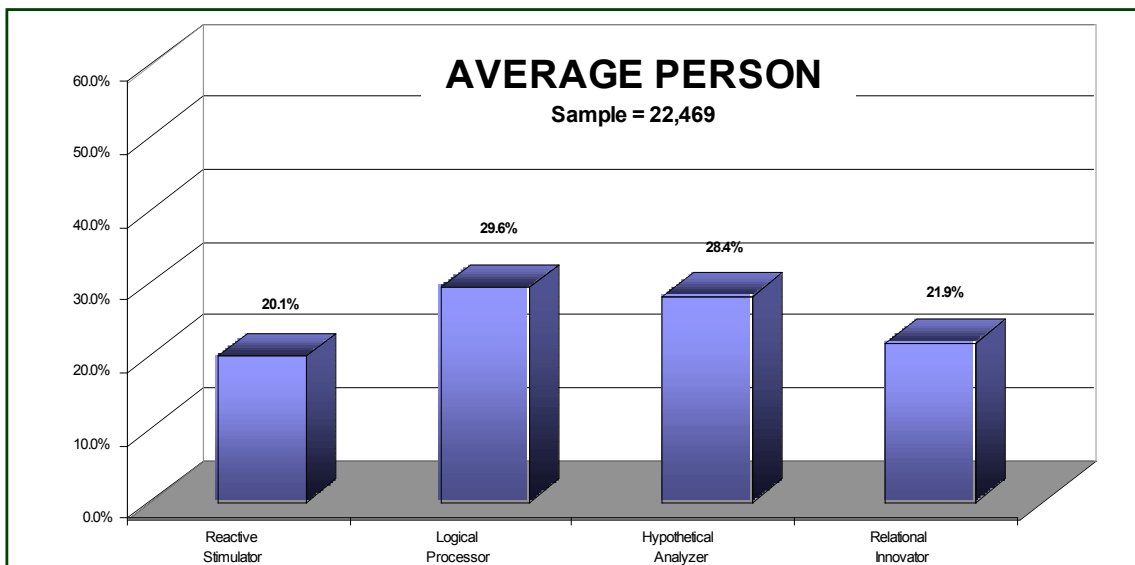
ADVANCED LEADERSHIP COACHING REPORT

DISTRIBUTION OF STYLES

Corporate Officer Style Distribution



↑
Dominant Style



ADVANCED LEADERSHIP COACHING REPORT

PRIMARY RELATIONAL INNOVATOR STYLE

PAGE 3 of Corporate Officer Report

BACKGROUND:

The purpose of the bullets is to give an idea of behaviors “falling out” of the primary style. For example, focusing on new approaches automatically prevents using trusted, standard methods for an issue. Whether a posture is good or bad depends on the issue being addressed.

ASK:

Does a general posture of sticking closely to methods that are already known seem “wrong” or “short sighted” to you?

BACKGROUND FOR QUESTION:

People do things because they believe it is the “right” thing to do. This can cause people who use different kinds of input to feel frustration, irritation or even anger.

Potential follow-up:

Do you see any value in people who use a detailed, methodical and perhaps plodding approach?

How accurately do you think the other bullet-points reflect your leadership approach?

BACKGROUND:

People have access to and use all four information-processing styles. This section shows how likely it is that Corporate’s dominant RI style will be used in a particular situation.

ASK:

Do the people you lead regularly try to get you back to “the point?”

BACKGROUND FOR QUESTION:

RI’s can wander as they explore various dimensions of an issue. People using an RI style tend to believe that their diversions are enjoyable. You may have to probe on this issue. Since Corporate is the leader, there is unlikely to be direct criticism.

ASK:

Do you think that your style supports or frustrates the group’s major work?

BACKGROUND FOR QUESTION:

Expect to hear that the approach being used is valuable. Every style contributes. The issue is how much of the work being supervised by Corporate benefits from the use of the RI strategy or if a mix heavier in another style would better serve.



ADVANCED LEADERSHIP COACHING REPORT

SECONDARY REACTIVE STIMULATOR STYLE

PAGE 4 of Corporate Officer Report

EXPLAIN:

Styles come in different strengths. The higher the score:

- The more quickly it will be applied (speed of response).
- The more often it will be used (frequency of use).

This percentage is the probability of using the secondary style over a long series of decisions.

ASK:

Does Corporate see quick action using expedient methods (RS) as a fallback to the new idea generating (RI) posture?

BACKGROUND FOR QUESTION:

Corporate is likely to say that this kind of shift is just the “right” thing to do. The reason it seems “right” is the RI/RS style. Point out that people using different styles will see different “right” things to do (e.g., study, analysis, reverting to traditional methods, etc.).

ASK:

Is the group able to anticipate you as you shift styles?

BACKGROUND FOR QUESTION:

If the group can anticipate a change, they can move forward without asking. Lead this into a discussion of how well Corporate’s direction can be anticipated. In other words, how fast will Corporate jump from new ideas to a “get it done using any means at hand” posture?

DISCUSS:

What can be done to make these changed expectations more predictable?

BACKGROUND FOR QUESTION:

If people can predict, they can act without being told anything. More things get done more efficiently. Ask how Corporate signals that it is time to change approaches. Ask whether the group must wait until the decision is announced.

What is done for people who cannot perform well following Corporate’s shifts?

BACKGROUND FOR QUESTION:

People using a more disciplined style (LP/HA) can encounter problems if they are asked to act quickly without forethought. Forcing these people to accommodate this posture can lead to frustration or worse. Does Corporate make any allowances for these people?



ADVANCED LEADERSHIP COACHING REPORT

EXAMINING THEMES

PAGE 5 of Corporate Officer Report

BACKGROUND:

- Themes are consistent behaviors that repeatedly occur in the group setting. They can support or frustrate the group endeavor.
- Themes can arise from sources other than information-processing preferences. For example, a person's upbringing can make them sensitive (or insensitive) to neatness. Or, experience in an accounting function could have made Corporate sensitive to the need for detailed organization of backup materials.

ASK:

For each theme identified in the report, does it support, frustrate or is it neutral to the functioning of your group as a whole?

- Environment: Do you think some of your people would prefer a more structured, stable setting?
- Planning: Would more stress on strategic plans (general paths to distant goals) give the group a better sense of direction?
Could more stress on operational plans (step-by-step procedures) improve quality?
- Coordination: Is your group sometimes confused by your approach to coordinating their activities?
- Motivation: Do you think you have motivation at peak levels? Could greater use of tangible rewards (e.g., small bonuses, status symbols, awards, etc.) improve motivation?
- Communication: Would some of your people prefer a consistent, detailed and explicit approach?
- Control: What might be the effect if you were to adopt a consistent, demanding approach?

ASK:

Are there other themes you have or are trying to establish?

Cycle through and note any other themes Corporate has or wants to install. You are trying to get an overall picture of the culture that is being established.

- What effect does it (or will it) have on group performance—will it detract from anything?
- Who do you expect to have a problem with in implementing this initiative?
- How do you intend to offset or mitigate the problem with these people (if any)?

DISCUSS:

All of your themes are good, but how well do your themes work together to maximize the mission of your group?

BACKGROUND FOR QUESTION:

There is a probability that Corporate will encounter some conflict between things that support personal advancement and those that further the mission of the group. The discussion should help Corporate balance the tradeoffs (e.g., optimizing personal versus group performance).



ADVANCED LEADERSHIP COACHING REPORT

EXPLAINING PATTERNS

PAGE 6 of Corporate Officer Report

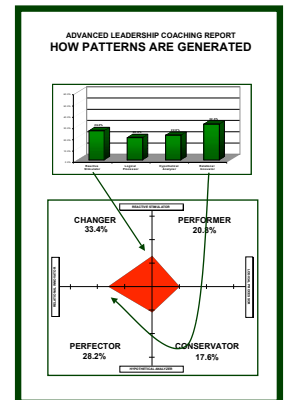
SHOW:

The “How Patterns are Generated” Coaching Supplement graph on next page.

EXPLAIN:

- RI (new ideas) is the most frequently used—(follow arrow to RI axis).
- RS (instant action) is next most frequent—(follow arrow to RS axis).
- Connecting the RS and RI creates a triangle in the upper left quadrant.
- That area is called the “Changer” quadrant. This is the natural outcome of new ideas (RI) being applied quickly (RS).
- The size of the “Changer” area is compared to the size of the areas in the other quadrants and is given as a percentage under each pattern name. This is the probability that Corporate will display this type of behavior.
- Note that Corporate has a material percentage in each quadrant. This means that predicting Corporate’s likely direction may be difficult.

HANDOUT 1



SHOW:

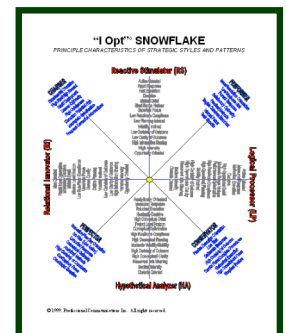
The “I Opt Snowflake” Coaching Supplement graphic that follows. Explain:

- The axes (horizontal and vertical) show the behaviors associated with styles.
- The diagonals show the behaviors associated with patterns.

ASK:

- Are the behaviors on the RI axis consistent with Corporate’s self-image?
- What about the behaviors on the RS axis?
- Do the Changer pattern behaviors (upper left diagonal) resemble Corporate’s preferred approach?

HANDOUT 2



DISCUSS:

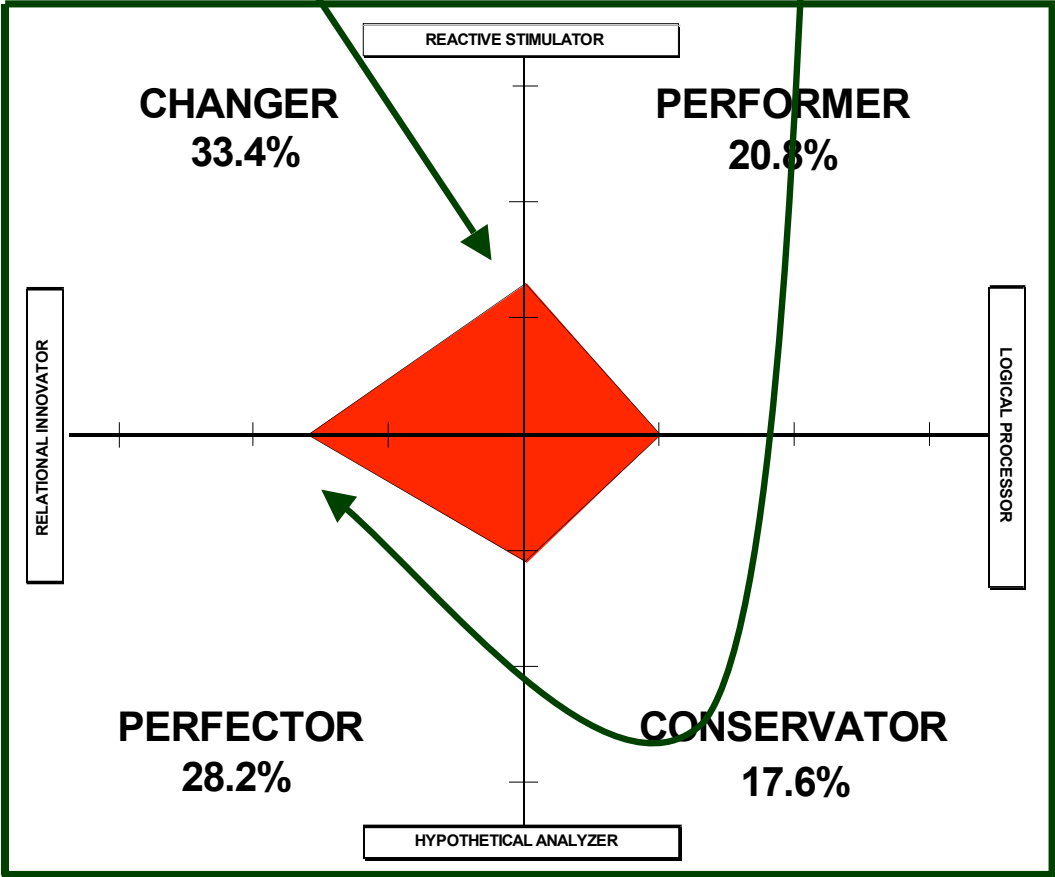
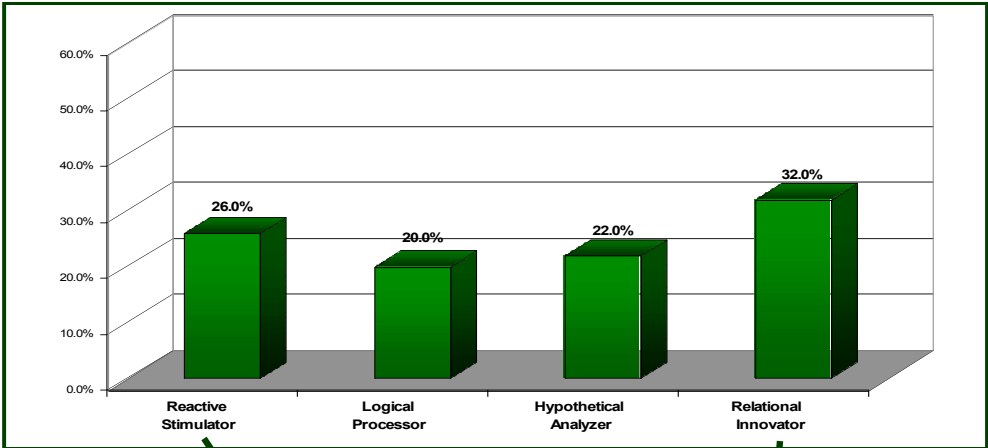
- How well suited are Corporate’s preferred styles (RI/RS) to the mission of the group?
- How important are the qualities across from Corporate’s preferred styles (i.e., LP and HA) and pattern (i.e., Conservator) to the group’s mission?

BACKGROUND DISCUSSION NOTE:

Corporate’s RI behaviors preclude the ones on the opposite side (LP). For example, new ideas and traditional methods do not coexist at the same time and place—it is either one or the other. However, traditional methods can be good thing in a lot of situations. Similarly, a Changer pattern’s orientation precludes the disciplined execution and precision preferred by the Conservator (opposite diagonal from Changer). Again, precise, dependable execution is not a bad thing. Try to guide the conversation toward the recognition of the value that people using other styles bring to a group. Strictly enforcing Corporate’s approach could prevent those behaviors and the benefits they can bring.

ADVANCED LEADERSHIP COACHING REPORT

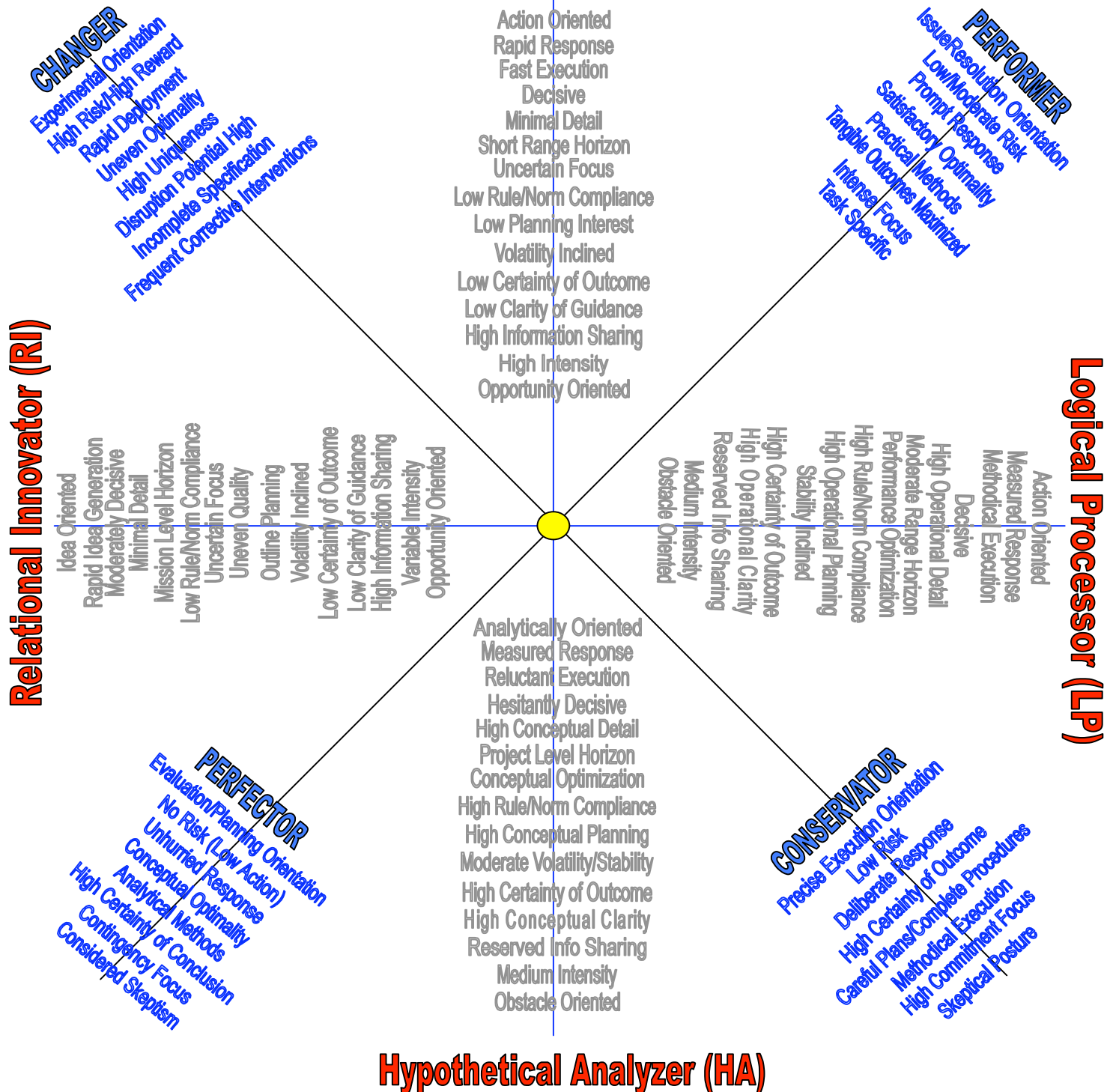
HOW PATTERNS ARE GENERATED



“I Opt”[®] SNOWFLAKE

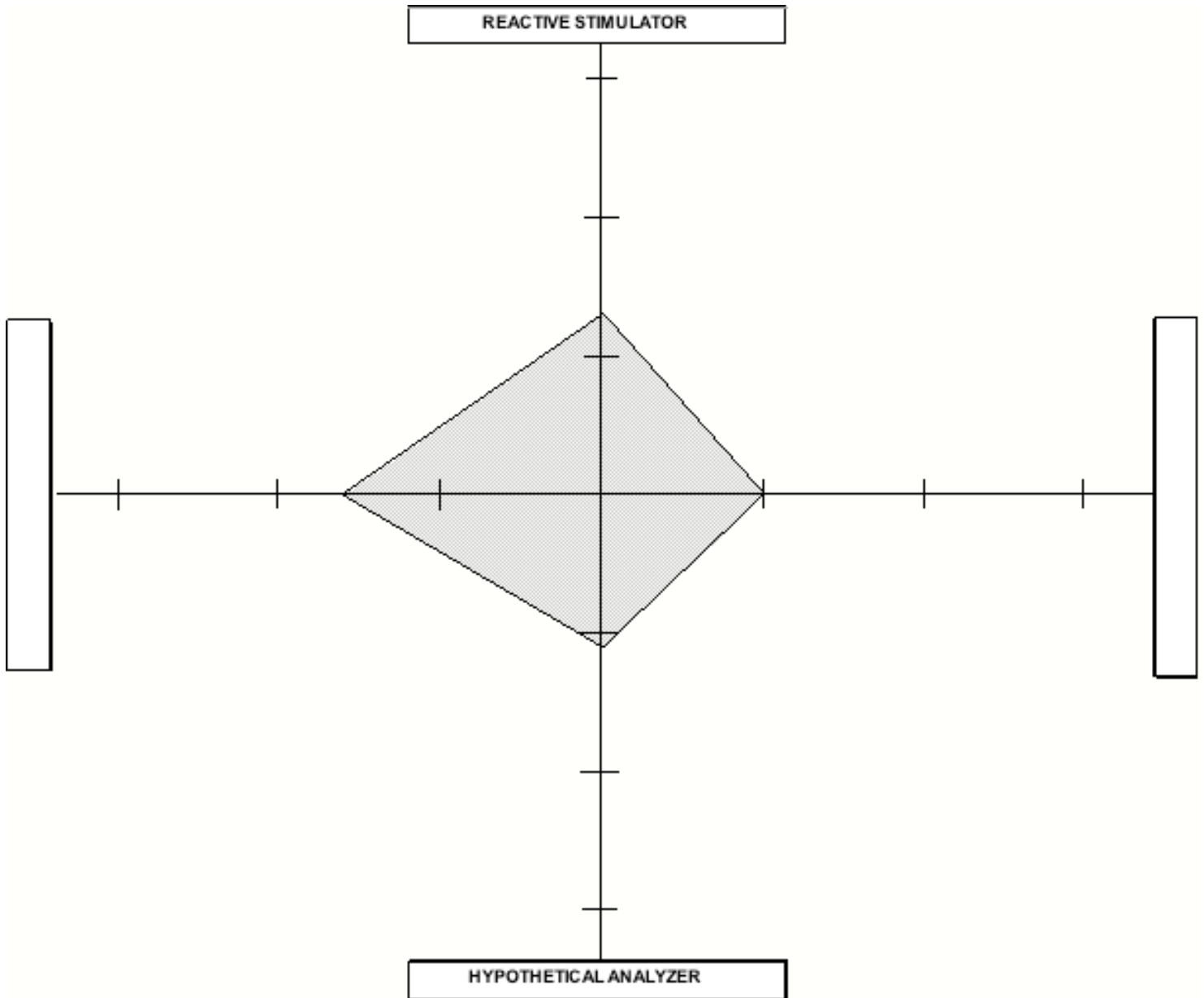
PRINCIPLE CHARACTERISTICS OF STRATEGIC STYLES AND PATTERNS

Reactive Stimulator (RS)



ADVANCED LEADERSHIP COACHING REPORT TRANSPARENCY GRAPHIC

(Overlay onto "Snowflake" to help illustrate behavioral probabilities)



ADVANCED LEADERSHIP COACHING REPORT

EXPLAINING THE PROFILE

PAGE 7 of Corporate Officer Report

BACKGROUND:

Group members must anticipate Corporate's shifts between styles and patterns. If Corporate's needs can be predicted on a particular issue, exactly the right thing can be done without even asking.

In Corporate's case, the shifts to other styles (LP or HA) and other patterns are likely to be infrequent. In a sense, this makes them more unpredictable. They do not happen frequently enough to be anticipated.

ASK:

- Do your people recognize when you need to move to really exacting analysis/planning (HA) or the disciplined, methodical use of a standard approach (LP)?
- Are there things you can do to make yourself more transparent in terms of your needs and expectations on issues as they arise?

BACKGROUND FOR QUESTIONS:

There is a probability that Corporate may view transparency as dangerous. Some people view unpredictability as an asset. These questions are meant to call attention to the positive value of being predictable. Efficiency and effectiveness can be improved if the people in the group know when it is safe (for them) to move to one of Corporate's less favored strategies.

BACKGROUND:

The second section shifts the focus to the needs of the people being lead. The discussion here should try to increase awareness to how the alignment between Corporate and the members of the group might be improved.

ASK:

- Do the people you lead have a good idea of what is in it for them if they are able to meet your leadership needs more exactly?
- Some of your group may be so different from you that they may have problems fully meeting your leadership needs. Is there something you can do to maximize their contribution?

BACKGROUND FOR QUESTION:

It is likely that at least some people in the group being lead have a lower alignment with the leader. You can recommend a strategy of division of labor for these people. For example, put them in an area where they will naturally excel and then leave them alone.



ADVANCED LEADERSHIP COACHING REPORT

EXAMINING VULNERABILITIES

PAGE 8 of Corporate Officer Report

BACKGROUND:

Information-processing preferences give rise to natural vulnerabilities. Speed is purchased at a cost of precision and certainty. The use of tested strategies automatically precludes entirely novel approaches. Vulnerabilities cannot be avoided, but they can be managed.

A vulnerability is a predisposition. It is only a potential. It becomes a real exposure when a situation or relationship makes it visible. Its severity is determined by how they are managed.

Cycle through the vulnerabilities identified to help Corporate begin to think about this aspect of leadership. The questions below are prompts to help solidify Corporate's focus.



ASK:

- FOCUS SHIFTS:** Does this posture seem to bother some people more than others?
There may be a tendency to focus on people who share the RI/RS styles and who will welcome focus shifts. The natural assumption is that if some can do it, all can.
- DIRECTION:** Do some people seem at a loss to understand what you want?
Structured styles (LP/HA) may need more explicit direction. Corporate may tend to cut them off before they have what they need.
- DELEGATION:** Do you consider the abilities of the people when making an assignment?
It is likely that assignments will be made spontaneously when a need arises. Also, Corporate may assume that others have the same ability as Corporate in addressing a variety of issues. Probe on whether Corporate is asking too much of the wrong people.
- UNDERSTANDING:** Does your group consider you a bit of a “soft touch?”
This is not likely to be extreme but is likely to be visible. Ask if adopting a more demanding posture might increase productivity.
- EXCELLENCE:** Are you considered the best there is in any dimension (i.e., ideas, analysis, methodical action, responsiveness)?
This is only a vulnerability if it is not recognized. Point out that the flexibility Corporate offers is likely to be the most important asset Corporate brings to a situation.
- INFLUENCE:** Could you have more impact if you were to take a decisive position sooner?
Probe as to whether Corporate may be a bit too cautious in making recommendations and judgements. Explore whether this could be interpreted as equivocation.

ADVANCED LEADERSHIP COACHING REPORT

EXAMINING STRENGTHS

PAGE 9 of Corporate Officer Report

BACKGROUND:

Information-processing preferences give rise to natural strengths as well as vulnerabilities.

Cycle through the strengths identified to help Corporate begin focus on how these might be magnified.



ASK:

WIDE SPECTRUM ENVIRONMENTS: Does your current job use the range of abilities?

Corporate may tend to “force” some use of each of Corporate’s abilities. Explore whether the use of these abilities is due to the job or to Corporate’s election. What might be done to make the job better fit Corporate’s profile?

NEGOTIATION: Do you get enough opportunity to use your skill in reconciliation?

Corporate may not be taking advantage of Corporate’s skill in this area. Areas of conflict are where this skill is most valuable. Could Corporate be rewarded for taking more risk by entering these areas of discord?

RESULTS: Could increasing your emphasis on tangible results improve your standing?
Corporate has a “results” orientation. But it may be a bit tempered. This question attempts to examine the relative benefits of recommendations (e.g., ideas) and outcomes (e.g., action).

CHARISMA: Are there enough challenging tasks to use your ability to inspire to best effect?
Applying charisma to minor tasks tends to depreciate it as an asset that is valued by others.

ADVICE: Is your advice sought out by people at higher levels?
This question attempts to focus on to whom the advice is being given. Ask about how often it is sought. On what subjects? Could this be leveraged to greater effect by being more assertive?

MEASURED RISK: Should you be taking more risks?
Do other people seem to be more comfortable than you in taking risky positions? Do they gain any advantage? Are there areas where you might go a bit farther “out on the limb?”

RANGE: Could you gain an advantage if you were to focus in a narrow area?
Corporate probably gets ideas on everything. Corporate is also able to address almost any issue that arises. This can lead to a diffusion of Corporate’s image. Explore whether Corporate might apply the range of abilities in a narrower area. For example, concentrating in a particular functional area or focusing on a specific problem.

ADVANCED LEADERSHIP COACHING REPORT

LEADING INDIVIDUALS

PAGE 10 of Corporate Officer Report

BACKGROUND:

Ideally you will have the “I Opt” scores for all of the people reporting to Corporate.

If “I Opt” scores are not available, you can attempt to classify the people in the group based on their behavior. This will often be inaccurate but does provide a focus for discussing leadership strategies.

If there is no group currently reporting to Corporate, use the people with whom Corporate is associated as a focus of discussion.



DISCUSS:

Let's cycle through all of the people in your group and see how they fit into the framework.

BACKGROUND:

Use the “Snowflake” pass-out to identify their tendencies. Keep track of who is assigned to each category for use in the next section.

ADVANCED LEADERSHIP COACHING REPORT

LEADING GROUPS

PAGE 11 of Corporate Officer Report

BACKGROUND:

Ideally you will have a TeamAnalysis™ for all of the people reporting to Corporate.

If a TeamAnalysis is not available, you can attempt to classify the group by counting the number of people you classified in each category in the previous exercise. The result will be inaccurate but it can still provide a focus for a group assessment.

The purpose of this section is to discuss the effects of Corporate on the group as a whole. Things like policies, standards and cultural norms affect the entire group simultaneously.



ASK:

Do you feel that you really get across to more than the percent (see circle) of people in the average group?

BACKGROUND FOR QUESTION:

Corporate will probably have a reasonable degree of compatibility with most groups. This is a natural outcome of the broad strength in styles being used. It is likely that Corporate will see the approach being used as being "okay." Explore whether there may be a gain by accenting the needs and interests of the group rather than letting the form of communication be set by focusing on the subject being discussed.

When we classified the people, the group as a whole seemed to register highest on the (select one: RS, LP, HA, RI) category.

- How well do you think your approach matches the needs of the group as specified in the categories cited on Page 11 of the Advanced Leadership Report?
- How do you think the people whose style lies outside the dominant group would respond if you fully satisfied the dominant style of your group?
- What kind of mix of leadership behaviors do you think would optimize the group as a whole?

ADVANCED LEADERSHIP COACHING REPORT

FOLLOWERSHIP

PAGE 12 and 13 of Corporate Officer Report

BACKGROUND:

This section changes the focus from down to up the organization. The purpose of this section is to discuss the followership effects of Corporate's strategy.

ASK:

- Where do you think you are located on the "Loose Cannon—Total Compliance" continuum?
- Where is your ideal position from your leader's perspective?

BACKGROUND FOR QUESTIONS:

It is likely that Corporate will tend toward the Loose Cannon end of the continuum. The contributions made from that position will stand out vividly. The loss to Corporate's leader in terms of things like deep analysis or less quality in routine activities will tend to be obscured. In other words, the cost of Corporate's strategy to the leader is likely to be underestimated

ASK:

- Would your leader value your viewpoints more if you were to take a strong, unequivocal position on issues at an early point? Could you do this at least with some issues?
- Do you think you could benefit from adopting a longer-range strategy and developing initiatives that all work together toward that long-range objective? Are there other strategies that might help build momentum?
- What might be the effect on your leader if you were to take a more focused and a bit more rigid positions on issues? Could you be comfortable adopting a less flexible position that was in line with your leader's approach?
- Do you think you project a consistent image to your leader and peers? What is it? Is that the optimal image for both you and your group?

BACKGROUND FOR QUESTIONS:

These questions are drawn from the bullets on Page 13. These are only tendencies. Any actual exposure depends heavily on the leader's strategic style. However, they do provide a means to begin to explore the relationship to the leader. Encourage the addition of items that Corporate views as an exposure.



ADVANCED LEADERSHIP COACHING REPORT

WRAP-UP

Corporate Officer Report

BACKGROUND:

Using the notes taken from the coaching conversations, rough draft a bullet-point summary of actions that Corporate might take to improve. Focus on the points where you seem to have reached a consensus that there was an exposure to be avoided or an opportunity to be gained.

Try to keep the draft brief. Corporate's strategy is to focus on the central aspects of an issue. You can touch on but not dwell on justifications, elaborations or explanations. Also, be certain to point out that this is a draft and that it requires Corporate's participation to make it an effective tool.

GENERAL STRUCTURE OF A DRAFT:

Corporate Officer LEADERSHIP ENHANCEMENT PLAN

New Themes to Establish (Page 5)

Existing Themes to Modify (Page 5)

Actions to Limit Vulnerabilities (Page 8)

Actions to Enhance Strengths (Page 9)

Individual Leadership Initiatives by Person (Page 10)

Group Leadership Initiatives (Page 11)

Followership Initiatives (Page 12 and 13)

ON-GOING SUPPORT (IF APPLICABLE):

- Review and finalize the Leadership Enhancement Plan to the point of firm agreement.
- Establish a protocol to continue coaching based on the initiatives agreed to and expressed in the Leadership Enhancement Plan.