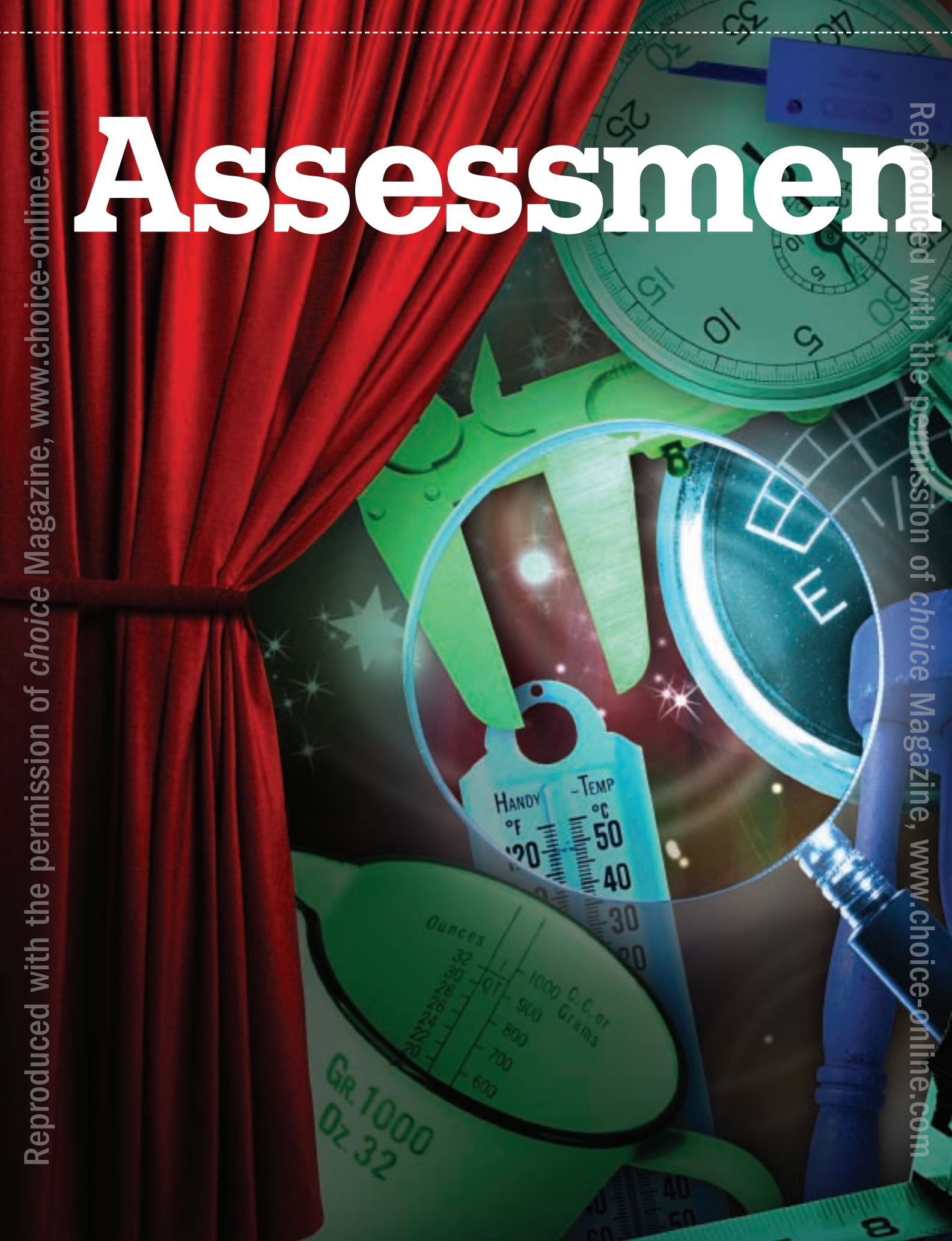


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Assessment

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Turbo-charge your coaching with the right tools

You can't determine how far you've come, or how far you need to go, unless you know where you started. There are many assessment methodologies, including holistic, person-centered and self-assessment, that can aid the coaching relationship, whether in a corporate or personal context. Read on for an examination of coaching-related assessment tools and methods.

By Margie S. Heiler, MS, MCC, CEC

A new coaching client and a blank canvas. Where do you begin? What colors, shapes and textures will contribute to the work? To this end, coaches, consultants, OD and HR professionals, training managers and facilitators all agree that a well-designed and executed assessment package provides tremendous value when implemented as part of a comprehensive performance development plan. The assessment package is the coach's

palette and, in skilled hands, the beginning of the magic and mastery of coaching.

The master coach builds an assessment package that is customized for the needs of the client, designed to create the awareness needed to achieve desired results. The assessments help objectify information that might otherwise be obscure, inaccessible or too uncomfortable to address. Assessments create a structured and safe context in which to deepen knowledge and explore possibilities for new approaches

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The Tools Explained

The **DISC Assessment** measures four dimensions of normal behavior:

- **Dominance** – How you respond to problems and challenges.
- **Influence** – How you influence others to your point of view.
- **Steadiness** – How you respond to the pace of the environment.
- **Compliance** – How you respond to rules/procedures set by others.

The **PTSI Assessment** identifies three conceptual arenas:

- **Systemic**
- **Extrinsic**
- **Intrinsic**

Six conceptual dimensions or perspectives are measured:

- **Empathetic Outlook**
- **Sense of Self**
- **Practical Thinking**
- **Role Awareness**
- **Systems Judgment**
- **Self Direction**

“All people exhibit all four behavioral factors in varying degrees of intensity.”
W.M. Marston

The **PIAV Assessment** measures the relative prominence of six basic interests or attitudes:

- **Theoretical**
- **Utilitarian**
- **Aesthetic**
- **Social**
- **Individualistic**
- **Traditional**

and more effective strategies. They also pave the way for the change process to unfold naturally and quickly. Both coach and client move easily and directly to the heart of what matters, to make intelligent choices about what actions/thoughts/mindsets need to be embraced in the course of moving forward.

What an effective assessment package looks like

Let’s examine an example of a suite of three assessments that can be used effectively in executive coaching. A DISC™ (Dominance-Influence-Steadiness-Compliance) assessment tells the “how” (behaviors or how a person acts); with PIAV™ (Personal Interests, Attitudes and Values), we get the “why” (what motivates a person); and with Personal Talent Skills Inventory (PTSI®), we get the “what” (cognitive skills – how a person gets results). These, coupled with coaching, grab the “will” – the performance synergy that brings a depth and breadth of meaningful and accurate information into an emergent whole.

The diagram shows the relationship of the assessments to each other and to the coaching process. Here is how this suite of assessments builds on one another:



Behaviors: The How (DISC)

A behavior assessment such as the DISC is a good place to start, since behavior is the easiest thing to see and change. Having that knowledge becomes the biggest modifier of behavior. With the DISC results, individuals, teams and organizations learn to understand, appreciate and adapt their behavior styles for effective communica-

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tion – one of the key success factors in the workplace. Follow-up behavioral coaching empowers those individuals, teams and organizations to take immediate action towards professional growth and practice the behaviors that will make a difference in their personal and professional interactions, and in their leadership.

Values: The Why (PIAV)

The outward behaviors have their origin in motivation. So, a next step in developing self-awareness is to examine the “why” of behaviors – what compels us to act as we do. As a window through which we view the world, values are the drivers of our behavior, or what motivates our actions. Taking increased knowledge of motivators into the coaching process, people open themselves to a deeper understanding of how the choices they make impact them and those around them. An assessment such as PIAV is a resource for assessing motivation and beliefs. As a person’s top motivators are acknowledged and satisfied, life becomes more rewarding.

Personal Skills: The What (PTSI)

Even more subtle than behavior and motivation are the cognitive processes that determine people’s potential for workplace performance. An assessment such as PTSI offers true insight into the perspectives that affect superior performance, so that individuals learn how to better use their skills. By learning about the capacities or personal

“**The assessment package is the coach’s palette and, in skilled hands, the beginning of the magic and mastery of coaching.**”

CASES IN POINT

Results of the “assessment + coaching” success strategy

What can happen when the coaching process is turbo-charged with assessments? Consider an executive coaching client who went through the suite of assessments described in this article and shared how the assessments, in combination with the coaching program, have helped him and his company. He said he has learned to position himself in teams and roles where he is challenged but has a high degree of confidence. This confidence has enabled him to be a key contributor in a division that has grown from \$40 million to \$120 million over the last seven years. While the business grew, his team made direct contributions to substantial inventory reduction, procurement cost reduction, and a 70 per cent increase in profitability. And, most importantly, he said he has learned to be comfortable and successful in personal interactions at all levels of a Fortune 500 corporation.

Another example of how individuals who take assessments bring their new knowledge of themselves back to their teams and the organization is an executive coaching client who recently shared the results of the changes she made with the support of the coaching program. She said she now understands what she wants, how she thinks, and what motivates her, giving her the ability to consider how her own behaviors can diminish or enhance her effectiveness. She used the knowledge she gained in the assessments process to develop specific action plans that positioned her for a new, challenging, high-visibility assignment, and is now performing well in a position with much larger responsibilities and making a much greater impact on behalf of her organization to achieve the mission of the organization.

“Creating and using an assessment package is not a random exercise or a one-size-fits-all proposition.”

skills related to the business environment, people can excel as leaders and create more impact in the workplace. The PTSI is unique in its ability to access an individual's cognitive structure, such as how that person analyzes and interprets experience, the likely reactions in any given situation, and the patterns used to make judgments.

These three assessments lay a solid foundation for individuals, teams and organizations to optimize a coaching program, to improve communication and relationships and to take human performance and satisfaction to a whole new level.

Benefits of using an assessment package in combination with coaching

Through a comprehensive assessment package along with a coaching report and development plans created in the coaching process, participants get a reflective, surprisingly accurate, in-depth look at who they are, often in ways they have never seen before. Assessments help individuals see more clearly how they fit into the culture and context of the organization and their specific team. In

addition, the coach quickly gets to know the clients at a profound level and can lend even greater support to the process of change.

Without follow-up coaching, people may not make full use of or apply the assessment information or they might arrive at some erroneous interpretations of their results. This is the beauty of a powerful assessment package – it energizes the coaching program and builds in substantial content, right from the start. The strengths-based and appreciative inquiry approach of coaching lends itself to a positive feedback process and a compelling development plan.

Creating and using an assessment package is not a random exercise or a one-size-fits-all proposition. In the hands of a skilled coach, it is an art – a tool to be used with the same creativity and intuition that makes any coaching tool effective in the coaching process. And most importantly, it fast-tracks clients to what matters most: living their values and reaching the goals they are seeking. The coaching conversations are catapulted into high-level change actuation sessions and the possibilities expand at an exponential rate. •



Since 1996, **Margie S. Heiler**, MS, MCC, CEC, has been contributing to major corporations, small business and government agencies as an executive coach and coach mentor, assessments consultant, team development coach and group facilitator working with an array of assessments to improve communications and relationships, match talent to job requirements and company culture, enhance performance management, and support succession planning. As a faculty member of Adler International Learning, she teaches coaching certification programs and coaching as a leadership competency to groups around the world. She has been instrumental in successfully planning and implementing cultures of positive change through coaching in several companies in partnership with colleagues and organization sponsors.

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