ChangeWise

The Pioneer in Leadership Agility

Guide to Planning a Leadership Agility 360 Process for a Group

These are the steps ChangeWise recommends for planning a Leadership Agility 360 process with a leadership development program (one or multiple cohorts) or a management group (one or more levels). The 5 phases that need to be taken into account in planning a group project are:

I. Planning/preparation
II. Orientation
III. Administration
IV. Debriefing & Action Planning
V. Follow-through

There are important questions that arise for each of these phases, which are highlighted in this guide.

How we can help

Both ChangeWise and Cambria provide services that support various components of this overall process. In planning any Leadership Agility 360 group project, we strongly recommend that you review these services early-on, so you can decide which ones you want to include in your program. These services are highlighted in red below at the points where they are relevant

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- At Cambria, contact Scott Simpson – ssimpson@cambriaconsulting.com

I. Planning/preparation

A. Plan the overall process. Review the steps in this document and use them to help you and your client organization custom-design the process that best meets their needs.

B. Meet with Program Champion(s). Unless you are the "Champion" of the program (have leadership and final decision-making authority for the project), you'll need to meet with that person or group to finalize high-level decisions about how the Leadership Agility 360 process will be integrated into the program:

1. Get in sync on the overall process. Jointly determine what the phases of the 360 process will look like for this project, including whether the orientation, debrief and/or action planning steps as taught in the certification workshop need to be modified in some way. If you do make changes, make sure the Sponsor understands the rationale for the phases as taught in

the workshop and how modifications may impact the results. (See details on the phases starting on page 3 below).

2. Finalize who will receive feedback.

3. Decide whether the process will include a check-in meeting between each participant and their direct manager between the Debrief and Action Planning sessions.

4. Get clear about what will happen after the Debrief and Action Planning phases. For example, will there be additional group activities that make reference to the Leadership Agility 360 or the Leadership Agility framework? Will participants receive coaching?

5. Plan and prepare the details of the orientation phase. For group agenda, review agenda and clarify roles.

6. Arrange for admin support in administering the instrument, if needed.

Questions that arise in the Planning/preparation phase

- **Q:** Is it necessary to provide coaching sessions after coaches have helped participants create their Action Plans?

  A: If the intended result from the process is change in leadership behavior (and it almost always is), change will be much more reliable and substantial when coaching is provided in addition to support in action planning. One rule of thumb is to do at least 3 coaching sessions with 6-9 at the high end.

- **Q:** Can you do the orientation in a group? Can you do it virtually?

  A: Yes and yes, if you cover the points outlined in the Group Orientation session outlined below. In-person is usually better, but not always feasible.

  For best results, even when there's a Group Orientation, we find it's very helpful to have a coach meet with each participant individually (in person, by phone, or online) for about a half-hour to answer questions and give them individual attention in their selection of feedback providers, something that benefits many participants. (See Manual for what to cover and how). In situations where coaching will be provided after the 360, this session also serves to begin to form a bond between coach and participant.

  If coaching will follow the Debrief and Action Planning phase, and you want each coach to get to know their "coachee," their roles and their leadership initiatives, then a one-hour individual orientation, in addition to the Group Orientation, is more advisable.

- **Q:** Is it better to present something on the Leadership Agility framework up front, or will this bias their self-assessments? Is it better to present the framework in a Group Debrief Session?

  A: A Group Orientation needs to have two parts: Presentation of the Leadership Agility framework and orientation to the Leadership Agility 360. Taking into account our experience and that of coaches and consultants who've used this 360 with their clients, presenting the framework during the Orientation phase will not bias their self-assessment. We don't have hard data on this, but we feel a basic understanding of the arenas and agility levels helps participants "learn" this 360 more quickly and thereby provides a more accurate self-assessment and makes it easier to debrief the report. It can also increase interest in getting feedback from this 360.

When presenting the framework, however, it's important to adopt a pragmatic, non-judgmental stance toward the levels, saying that, unlike most 360s, being all the way "to the right" on each item *may* be but is not *necessarily* the optimal place to be, because you need to factor in the pace of change in your work environment and the extent to which you need to work with stakeholders to be successful in your role. You may want to assign a pre-reading for the Group Orientation, such as the white paper "Leadership Agility: From Expert to Catalyst."

If you're going to do a Group **Debrief** Session, it can work well to present the framework during the Group Orientation, then do a "light" or "reminder" version of the framework at the beginning of the Group Debrief Session.

- **Q:** Do I really need to create a presentation on the framework and an orientation to the Leadership Agility 360 from scratch?

  A: No you don't. We now provide several options for this:

  First, some coaches are using a package we've put together that includes a presentation of the framework and a facilitated "Three Ed's" session that is easy to learn and deliver. This package includes detailed agenda, slides, audio-clips, and talking points. For any given project, you can use the presentation only or the full 3-hour module. This is for trained Leadership Agility 360 coaches only, and we've made it available for a very reasonable licensing fee.

  We also have a package of slides and talking points that capture what's worked best over the years in orienting a group to the Leadership Agility 360. This is available for an even lower licensing fee.

  Finally, if you find yourself in a situation where you feel that having "the author" present the framework will increase its impact, you can arrange for Bill to present the framework in person, by webinar, or by webinar recording.

  If you'd like to find out more about any of these options, just let us know.

- **Q:** My client doesn't have the time/budget to do 2-hour Debrief Meetings and an additional 1 hour Action Planning Meetings. What are the best options for streamlining these meetings without significantly reducing the results?

  A: From our certification reviews, we have data from a large number of coaches that show that these are the optimal time frames for the Debrief Meeting and the Action Planning meeting. However, there are several approaches that have been used in group projects to streamline these meetings.

  First, if a Group Debrief is well-designed and you use one or more facilitators who've been trained in the Leadership Agility framework, you can save some time and achieve your intended result. However, we've found that a debrief without any time with a certified coach is not very satisfactory. We recommend that a Group Debrief be followed by at least a half-hour individual debrief session with a certified coach. Optimally, you may want to allow an hour for this. Also, if you reduce the amount of debrief time, it's very helpful to encourage participants to use the Development Planner before the debrief to identify key take-aways from the written feedback.

Another option for streamlining is to reduce the number of expected action items from the feedback from three to one or two. This way, you need slightly less time for the debrief and can definitely save time in the action planning step.

Finally, another way to save a bit of time is to do the action planning work in a group, supplemented by a little individualized time with a coach. Although it's possible to get a good "running start" on action plans in a group session, we've found that the quality of the action plans – and the magnitude of behavior change results – are significantly higher when such an event is followed by one-half to one hour of 1-on-1 time, where each individual receives coaching assistance in completing their action plan.

II. **Orientation**

Conduct a Group Orientation, deigned as noted above, to be attended by all participants. The orientation can be in-person or virtual. Participants who cannot attend the event can catch up by viewing a recording.

A. Have the Sponsor(s) articulate the reasons for engaging in this process and the expected benefits for participants and the organization. Clarify that this is to support them in their development, not to evaluate them, and that confidentiality will be honored and what that means: No one besides their coach will see their results, unless they choose to share them, and, other than their managers, they will not know which individuals say what.

B. Allow approximately an hour, including Q&A, to present the framework. An orientation to the Leadership Agility 360, with Q&A, takes approximately 45 minutes. If you add the 3-Ed's exercise to the presentation on the framework, that will take an additional 2 hours. An introduction with this exercise is clearly the most powerful way to begin a group project.

C. Provide an orientation to (a) the Leadership Agility 360 and (b) the phases of the 360 process.

   Highlight the Leadership Agility 360's unique features, and, in situations where the group has experienced other 360, what is different about this instrument. For example:

   1. How the instrument embodies the framework.

   2. Rather than the traditional 1-5 or 1-7 rating scale, each item involves a 2-step process. Say, "Be sure to read instructions carefully."

   3. For anyone providing feedback to more than one other person, the instrument will automatically utilize its "comparative rating format." They will assess each person on the

first item, then move to the second item, etc. This approach has been shown to be faster and more accurate than assessing one person all the way through, then going to the next person.

Walk through the process, including timeline, Individual Orientation Meeting, Debrief and Action Planning Meetings, and what participants are expected to do during each phase. Clarify whether a check-in meeting with their direct manager will be part of the process. Provide guidelines for selecting feedback providers. (See "Your Role in the Leadership Agility 360 Feedback Process" for specific points you may want to cover in taking about the 360 process).

D. If there will be a group session after the instrument is administered (and there usually is), discuss the purpose and timing of this event or these events. (See #8 below).

E. Respond to any questions, concerns from the group.

Questions about the Orientation phase

See questions about the Orientation phase already covered above in the Planning phase.

Q: If the Group Orientation Session is in-person, is it better for the coaches to attend, or not?

A: Although it's a good idea to do some kind of private orientation for the coaches (email plus virtual meeting) to give them context for the organization and the program, it's much better if they can also attend the Group Orientation Session (or see a recording, if it's virtual). This gets them fully aligned with what participants are hearing and prepares them to do a good job in their role.

III. **Administration**

For information about how Cambria can support you in planning and carrying out the administration phase for a group project, see "Cambria Support + Pricing" document in the "Cambria Support" folder in File Cabinet on the Leadership Agility 360 Coach Groupsite.

IV. **Debrief & Action Planning**

For a group Leadership Agility 360 process, there are two basic options for doing the debrief and action-planning phase. Both approaches have been used successfully:

A. **One-on-one** Debrief & Action-Planning sessions, designed as recommended in the Certification Workshop. (See Manual). If this is the option you choose, you will probably want to do at least some kind of follow-on activity that brings the group as a whole together. (See follow-through phase below).

B. **Group** Debrief & Action-Planning event, in person or virtual. (See comments above about planning such an event).

Questions about the Debrief & Action Planning phase

Q: What is the usual design of a **Group** Debrief?

A: The details of these designs can vary. The following elements are often included:

- Prior to the event, just as they would for a one-on-one debrief and action-planning process, participants fill out the section of the Development Planner that captures their take-away's from *the written comments* (and no further).

- There is some kind of presentation and discussion of the Leadership Agility framework.

- There may be a brief presentation of the group's overall Leadership Agility profile, where data are displayed anonymously. For example, by arena, by type of agility, and by level of agility. Then a discussion of patterns and their implications.

- Participants are guided through individual reflection, paired discussion and small group discussion exercises that take them through the same steps they would move through in one-on-one Debrief Meetings.

- As noted earlier, to complete the action plans, this session should be supplemented with one-and-a-half hour individualized action planning sessions.

Q: What if I'd like help planning a Group Debrief meeting?

A: ChangeWise can assist you using our shadow-consulting rate.

V. Follow-through

In addition to coaching sessions that begin once action-planning is complete, some consultants and/or organizations have arranged additional follow-through activities. These include but are not limited to periodic team/group sessions, support-group fashion, to discuss progress on action plans – sharing successes, discussing stuck-points, getting coaching from the group and a qualified coach or consultant.

Questions about Follow-through

Q: What kind of support does ChangeWise provide for this phase?

A: If desired, we can provide:

- A team of certified Leadership Agility coaches for this phase and/or for the preceding phases.
- Consultation on the design of this phase, using our shadow-consulting rate.
- Specific Leadership Agility services, such as the following workshops:

  - The Leadership Agility Change Lab
  - The Agile Team-Leader Workshop
  - Pivotal Conversations (workshops of various lengths)