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Should I share personality profile data?

The Situation

“I’ve been doing team coaching with a group of leaders and the organization would like to roll this program out more broadly but wants to also share the personality profile data with the entire organization. How would you approach this?”

The Experts Weigh In

By Victoria Trabosh, CDC®, CEC

Good to hear that your organization is working with the senior team and now wants to assess a broader group within the company. These types of assessments can genuinely create a common language and rudder for navigating leadership and communication ... or they can become an internal joke. And as a coach, you know there’s nothing funny about growth.

Sharing data is tricky because how others interpret information is subjective. Could another person looking at a leader-level profile use it as a label rather than a means to gain

understanding? Is the leader willing to share the information, or do they disagree with the findings? Does the leader demonstrate some leadership behavior (or lack thereof) that makes them ineffective for the person or team they are leading, and will this ‘evidence’ in the assessment be used against them?

I ask these questions because we instantly judge another. While judgment will never end, how do we prepare a broader audience to look at assessment results – their own as well as others’ – to use as a tool and not a label? Honestly, this will be your biggest challenge and one the leadership team must recognize, communicate, and personally understand.

Here are my three strategies for taking personal assessment information for one or a group and sharing it with many.

1. Use an executive summary format. The more detailed the information given, the more questions arise, likely without an opportunity to provide a detailed explanation. Summaries are like snapshots and allow the reader to compare and contrast with others in the group rather than rate and judge.

2. Pick an assessment tool that is understandable without massive training. The wider the reach when using an assessment in a company, the more training you must do. If the assessment is complicated and the person cannot immediately begin to apply its action items, they may give up and stop using it.

3. Measure twice, cut once. *Before* any assessment is chosen, have a comprehensive discussion on whether it’s the right tool that brings value. Is it priced reasonably for the audience size that budget will not limit its use? Is the company willing to stay with the same tool over time (at least three years) so that individuals taking it are eager to use it rather than consider it the ‘tool de jour’? Are the executives on board, or will they minimize its value, thereby creating non-compliance in its use and purpose?

As a coach, bring in your expertise and experience to get buy-in from the executives. Then your assessment tool will help the company and its employees for years to come.

By Craig Carr, BCC, PCC, CPCC

From your description, I can't tell if you want to know how to approach this because you *don't want* to share profile data or *want* to share the profiles and aren't sure how to approach the employees.

Either way, it's a sticky situation for you, and some variables move the needle when it comes to weighing the gravity of making the profiles public. For example, suppose the organization is small enough that everyone can connect and collaborate. In that event, a case could be made for one big, harmonious team that trusts each other with sensitive information. For me, in that case, the maximum size would be around 40 people, but that could be stretching it.

So, go for it if this is a tight-knit group and everyone signs a release to share personal data. Even then, I'd be cautious

and sure there is resiliency and psychological safety in the organizational body. Any serious mistrust of leadership could torpedo your project. Does your intuition tell you that people are holding back and not speaking up or objecting? For some, would this be another example of leadership forcing something on them that they must agree to? If the answer is yes or unsure, then they're not ready, and the rollout is likely to be ineffective or worse.

Meanwhile, I imagine you are measuring the value of sharing profiles with the payoff of the program. If it's fundamental to what you're doing and you need the profiles on the table, getting signed releases is a pre-requisite, especially if shared information can be considered delicate. In my view, since we're talking about team coaching, training, and development, don't even think about proceeding without 100 percent opt-in!

As a thought experiment, let's imagine you and the leadership group proceed as if releases aren't necessary because no one is objecting. How do you make the discernment between yes, do it (they feel safe and trust each other), and no, don't do it (fear of reprisal or something hidden and nefarious that stops people from speaking up)?

If nothing else, being confronted with this question will give you a ton of information about the organization's health and cohesiveness. In other words, don't be attached. Rolling out the program may be suitable for your bottom line, but is it also a way to divert attention away from what's really going on.

Unconscious as that may be, how possible is it, and how will you find out? Essentially, your job is to ensure you are not colluding, identifying with, and becoming part of a dysfunctional leadership system.

By Suzi Pomerantz, MT, MCC

You said you were "doing team coaching with a group." Not all groups are actually teams. Team coaching works with an intact team with a shared purpose. Group coaching works with any other grouping of people and requires a different approach. Do they actually want to make *group* coaching available across the organization rather than *team* coaching? Teams cut vertically as well as horizontally, and have distinct and different purposes.

What would be the purpose for rolling out an enterprise-wide team coaching program? What outcomes do they expect? What are they hoping it will do for their teams? To evaluate these questions, use the *Team Diagnostic Survey*, the Harvard-created diagnostic tool that is an MRI for teams.

It provides data on the six conditions that influence high-performing team effectiveness and analyzes whether they

are really a team and whether they have a sound structure, supportive context and compelling purpose. How do they measure up in the areas of effort, strategy, knowledge and skill? How effective are they and where are the gaps for improvement? This data would be worth sharing organization-wide to determine which teams actually need team coaching and why.

Now, for your question of personality data sharing – there's a bit to unpack:

Does the organization have the right to share the data from one team (or all teams involved in team coaching) with the whole organization? This could be a moral/ethical/values issue. Do they value the confidentiality and personal privacy of the employees? The trouble with sharing

personality profile data across the organization (even if you had permission from every employee to share their data), is that you still have the "so what, now what?" phenomenon of personality profiles.

It makes sense to share this data within an intact team whose members need to work closely together daily, but why more broadly? What good will it do if, for example, the head of marketing knows the data of the head of janitorial services, and vice versa? What does that do for the organization? How does it advance stated goals and objectives?

Dig into why they want to expand the team coaching program and for what purpose. Then co-create with your clients the solution that will best serve what they actually intend. •

Are you grappling with a sticky situation?

You don't have to go it alone. Let our senior coaches give you some different perspectives to consider. Email your situation to submissions@choice-online.com and put "sticky situations" in the subject line.