



Creating a Coaching Culture at Thomson-Reuters

Bob Parsons

Director, Executive Coaching Office



History

- “Coaching” was a bad word
- Poor 360
- No validated competencies
- “Seagull” development
- Succession plan mapping vs. talent discussions
- Zero coaching development
- Lack of strategic approach to development
- Definition and value proposition are unclear
- No cost leveraging



Current Realities

- Sales is building a strong foundation
- Strong Talent Management process
- Validated competencies and 360
- Work with the “well”
- CEP, first “pilot” to develop internal coaches
- Lack of strategy...no standardized process for identifying, selecting, sourcing & evaluating external coaches
- Brokering more coach resources
- No clear measurements of success
- Developing Talent lowest scoring competency



What Thomson clients want from a “coaching office”

- Define coaching
- Evaluation, ROI, tracking & reporting
- Support for Hi-Pos, top talent & mid-level
- Manage internal/external resources
- Quality referral service (credentials, matching, experience etc.)
- Corporate strategy i.e. Coaching model for the organization
- Consulting services i.e. recommended approaches, tools, resources, etc.
- Curriculum/certification for building on internal capabilities

Lessons Learned

- *Communication and Education:* Intentional communication and education with key partners and stakeholders
- *Partnerships:* Coaching is best done in partnership with HR Partners
- *Manageable effort:* Start small with coach pools: quality not quantity works best
- *Top Notch External Executive Coaches:* The best coaches have a mixture of organizational insight, coach training, systems thinking, business acumen, emotional intelligence, and bias to action
- *Develop Your Coaches:* Providing development and “communities of practice” to both internal and external coaches is effective

Lessons Learned (cont'd)

- *Client Control:* Giving clients choice increases success and effectiveness
- *Adequate resources to build the practice:* Administration of Executive Coaching is demanding: ensure you have adequate support to drive, track and enhance processes.
- *Be Strategic:* Apply process and help clients look forward
- *Clarify Target Audience:* Save coaching for time-efficient, high potential development
- *Build a strong feedback approach:* High performing cultures are feedback-driven

Summary

- Hire HR & OD professionals with strong coaching skills & credibility
- Change the language
- Leverage a champion
- Start with competency-based development
- Work with those who want to work with you
- Model the behavior you want to see
- Listen with every fiber in your body!

Mentoring Defined

“Offline support by one person to another in making significant transitions in knowledge, work or thinking.”

Dr. David Clutterbuck & David Megginson, *Mentoring in Action*

“A partnership that leverages one leaders' experience to accelerate another's' development.”

Thomson University

“Power-free facilitation of learning”

Chip R. Bell, *Managers as Mentors*

What is Mentoring?

- Mentoring is a relationship between equally involved partners that is focused on learning & career development. It usually involves a partnership between two people, where one (usually more senior) &/or more experienced in the organization) acts as a role model, a guide, a coach, & confidante to the other.
- “Mentoring is a relationship in which one person *facilitates the learning* & development of another by sharing knowledge resources.”



What is Coaching?

- “Taking **valued** people from where **they are** to where they **want & need** to go?” *(InsideOut Development)*
- “Expanding a person’s capacity to take effective **action.**” *(Robert Hargrove, Masterful Coaching)*
- “Structured process in which a trained coach partners with the client to expand his/her capacity to take quicker, strategic **action.**” *(Bob Parsons)*
- “Translation of insight into meaningful **action** in order to unleash potential.” *(Merrill Anderson, Cylient)*

Benefits of Coaching

Organizational

- Tie to signature process, developing talent
- Drives innovation
- Retention of key talent
- Increased decision velocity
- Cost effective for internal resources

Individual

- Focuses on individual development & growth
- Produces behavior change more rapidly
- Direct connection to workplace tasks & function
- Clear measures/metrics in place
- Ownership

Debunking the Myths of Coaching

Myth	Reality
Coaching can't be defined & it takes a lot of time.	Coaching is a well- defined structured process, with start & finish points, typically spread over three to six months with a weekly meeting of 1-2 hours.
Coaching is another name for Mentoring.	Mentoring is longer-term & has broader scope.
Successfully coached individuals may leave.	Personal & professional development creates loyalty.
Coaching has to be done face-to-face.	Phone coaching can be used & takes less time, is less expensive & the majority of the coaching is completed over the phone.
Coaching is "cheerleading" & doesn't add to the bottom line.	Coaching is action oriented & requires real-life business application. Coaching simulates "shifts" in thinking & doing.

What can Thomson leaders expect from coaching?

- Structure
- Process
- Focus on leveraging their strengths
- Confidentiality
- Transformational thinking
- Breakthrough thinking
- Results

Rose Fedt Hughes
Leadership Development Specialist and Coach



Why Coaching Culture at Park Nicollet?

Purpose:

- To promote & implement a proactive “coach approach” that serves as a vital tool in the development & enrichment of leaders & team members
- To build a coaching community that aligns with the core values & moves Park Nicollet team members to create an inspiring, engaging high performing culture

Coaching Goals:

- Demonstrate the ROI (Return on Impact)
- Create a sponsorship & support for a “coach approach”
- Provide 1:1 targeted coaching focused on individual performance, professional growth, accountability & action.
- Develop & manage coaching as a strategic initiative

“What is a “coach approach?”

- Expanding a person’s capacity to take quicker, more effective actions.”
Robert Hargrove
- Asking questions, listening, messaging, languaging, & acknowledging
- Helping people think for themselves
- Develop employee’s “business acumen”
- Moving others from “inspiration” to “implementation”
- Creating ownership amongst our employee population
- Ask critical, strategic questions when looking to solve business problems
- Tapping the “innovative” mind of our workforce

Criteria for PN Coaches

- Is willing to learn and develop
- Wants the best for others
- Able to let go of self and control and differentiate self from client
- Has a commitment to PN
- Has a strong personal foundation
- Has a high level of EQ & compassion
- Are able to be vulnerable
- Are trustworthy and able to establish trust
- Values self and others
- Are “authentic” and willing to be present at all levels with client
- Willing to create “space/time” for coaching
- Willing to work with all levels of leaders and resistance
- Formalized accredited coaches training program. Certified by the ICF

Leadership Coaching Audience

- High performer/high potential individuals
- Have a strong desire/motivation to develop
- Have the ability to be vulnerable
- Have the ability to be a learner
- Have a commitment to a coaching relationship
- Have a intention to stay at PN
- Are not in a formal performance management process
- Are not doing it for a formal job requirement/expectation
- Are not seeking therapy

Steps to Creating the Wave

- Strategic Operational Coaching Blueprint
- Share our story with the organization
- Celebrate our accomplishments
- Model the coaching behavior
- Participate in the creating the culture
- COACH

Donna Campbell

Lead Coach – BCBS Minnesota



The Blue Cross Blue Shield - Coaching Initiative

- Large Scale Change Initiative/Cultural Shift
- External coach hired to develop internal employees with coach potential
- Designing a Coaching Program and Materials to support Training and Change Initiative
- Coaches Reside in Business Unit
- Working with OD
- Engaging Stakeholders
- Developing a Communication Strategy
- Identifying and Responding to Issues and Themes
- Developing Tactic's
- Measurement
- We are Evolving and Changing
- Acting as a Catalyst to Engage Others Inside the Organization in Coaching
- Partnership with Cargill, Park Nicollet and Thomson Reuters

Marci Heerman
Program Lead – High Performance Management
Coaching Program



Applied Learning Coaching at Cargill

- High Performance Management Program
 - 9 Month Leadership Development Program for New Managers & Emerging Leaders
 - 400 program participants involved in 15 months
 - 15 External Coaches/5 Internal Coaches
 - 4 2 ½ day instructor-led workshops on
 - Self Awareness
 - Coaching
 - Developing Others
 - Engaging Others
 - 12 1 hour tele-coaching sessions throughout 9 months

Criteria for Selection of Learning Coaches

Demonstrated experience and skill in following the ICF standard approach to professional coaching following these guidelines:

- **Discover, clarify, and align with what the client wants to achieve**
- **Encourage client self-discovery**
- **Elicit client-generated solutions and strategies**
- **Hold the client responsible and accountable**

Certifications Preferred

- – Coaching certification from an ICF accredited organization
- – DiSC, MBTI
- – Gallup Strengthsfinder; Lominger, Emotional Intelligence certification

Criteria for Selection of Learning Coaches

- **Minimum Requirements**
- 9-month commitment to deliver 12 1 hour tele-coaching calls to individuals in US & Canada.
- Ability to Apply Coaching within a Prescribed Curriculum
- 5-10 years experience in performance coaching, or in a management position within a large organization. (i.e. production-facility, global organization, union environment, etc.)
- Performance coaching experience working with mid-level managers in production environment

Results – What are We Most Proud of?

- Personal and Professional Transformations that have occurred as a result of working with learning coaches
- Qualitative & Quantitative Results show this type of applied learning sets this program apart from other Learning & Development offerings
- Quality assurance is in place to select qualified coaches & mentor internal coaches for success
- Creation of Community of Practice to build network & share expertise among coaches
- Growing demand for this type of learning coaching in other venues

High Performance Leadership Academy

Fundamentals of Management

Who:
Course participants are new supervisors and managers.

What:
Basic supervisory skills including communicating, leading, managing change, delegating, resolving conflicts, adhering to HR regulations, assessing performance, solving problems, and making decisions.

Why:
Instill basic, well-rounded foundation of supervisory skills.

How:
Contact Learning & Development;
Funded by BUs/Functions;
Varied delivery options (e.g., e-learning, classroom training, etc.).

new leader

High Performance Management

Who:
Course participants are supervisors and managers.

What:
Advanced supervisory skills including coaching skills, situational leadership, people skills, 7 Habits of Highly Effective People, root cause analysis, risk assessment, and basic finance.

Why:
Enhance supervisory skills to initiate and support high performance within the organization.

How:
Contact Learning & Development;
Funded by BUs/Functions;
Varied delivery options (e.g., e-learning, classroom training, etc.).

Transitioning into Leadership

Who:
BUs/Functions nominate participants. Selected basis performance, development needs, and cross-representation of BUs/Functions; managers and thought leaders.

What:
Leadership, High Performance, Facilitation Skills, Strategic Thinking, Innovation and Change, and skill building.

Why:
Provide participants with a broadened perspective of the organization and its structure and strategy.

How:
Contact Learning & Development;
Funded by BUs/Functions;
An 18-month leadership program; delivered regionally with some virtual interaction.

High Performance Leadership

Who:
Platform and Function Leaders nominate participants, basis performance, perceived potential, development needs, and job scope.

What:
Leading and coaching for high performance, customer focus and broadening perspective (interpersonal focus).

Why:
Enhance participants' performance in their current position and prepare them for future positions.

How:
Contact Organization Effectiveness (OE);
Funded corporately;
Regional (NA & LA together; Europe, Africa & Asia together), 4 sessions of 5 days each over a year;
Sessions held regionally.

Future-Focused Leadership

Who:
CLT, Platform Leaders, and Function Leaders nominate participants, basis their performance, perceived potential, development needs, and job scope.

What:
Leading & coaching for high performance, customer focus, and broadening perspective (strategic focus).

Why:
Prepare participants to take on more strategic roles, teach and cascade messages in their BUs/Functions. Offer senior management an opportunity to meet the talent.

How:
Contact Organization Effectiveness; Funded corporately; Four sessions of 3-5 days each over 16 months; Three in Minneapolis and one outside the U.S.

Transformational Leadership

Who:
CLT, Platform Leaders, Function Leaders

What:
Leading and coaching for high performance, customer focus and current leadership and talent management issues.

Why:
Provide participants with an opportunity to experience Future-Focused Leadership session content, so they can provide feedback, are prepared to teach sessions, and can effectively support nominated participants.

How:
Contact Organization Effectiveness; Funded corporately; Two sessions a year – 1-3 days each in Minneapolis.

Senior leader

Cargill

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Ag & Farm High Performance Management (HPM)

Group 2 - Program Outline & Session Objectives

Phase 1 September 25-27, 2007 Minneapolis, MN	Phase 2 December 18-20, 2007 CAN Location TBD	Phase 3 March 4-6, 2008 Location TBD	Phase 4 June 10-12, 2008 Minneapolis, MN
Self Awareness	Coaching	Developing Others	Engaging Others
<ul style="list-style-type: none"> • Become aware of your strengths and limitations. • Learn how to leverage your strengths, • Gain skill building around reflection and self evaluation. • Expand your capacity for continuous learning and growth, both, personally and professionally. 	<ul style="list-style-type: none"> • Assess employees' development to identify needs. • Learn to develop a safe environment that promotes truthful and empathetic dialogue between management and employees to identify and assess needs. • Assess where people are, what their main strengths are and how to leverage their talents. 	<ul style="list-style-type: none"> • Gain skills to provide candid feedback regarding performance and business development opportunities • Learning to provide the employee with challenging work assignments to accelerate and deepen their development. • Build skills to clearly articulate development goals and engage in continuous dialogue to guide and support the development of others. 	<ul style="list-style-type: none"> • Develop and perfect high trust interview skills to build rapport and credibility with employees. • Discover how to value talents and how to leverage differences effectively to model desired behaviors and accountability. • Learn how to help employees know the unique value they add to the organization. • Learn how to help employees set challenging but realistic goals to achieve professional success and surpass expectations.
<i>Application on the Job</i>			 Results
<i>Business Challenge</i>			

Heidi Bloedow
Director, West Reference Attorneys
Thomson Reuters



Coaching In Action: West Reference
Attorneys

My Personal Experience

- Background/Career
- How Bob Changed my Life
- Reference Attorneys

West Reference Attorneys

- Who We Are:
 - 150 Bar-Admitted Attorneys
 - Representing 20 States & 5 Countries
 - Over 525 Years of Practice Experience
- What We Do:
 - 24x7x365 Legal Content Support
 - Westlaw + 60 Specialized Products
 - Voice of the Customer
 - \$10M Revenue Goal
 - Extremely High Customer Satisfaction

Evolving the Culture: Phased Approach

- Starting Small
 - Walk the Walk
 - Targeted Discussions
 - Open Communication
- Building on Successes
 - Sharing “Wins” and Best Practices
 - Defined Process and Expectations
 - It’s about the People
- Gaining Momentum
 - Identifying New Coaching Opportunities
 - Customized Coaching Forms
 - Colleague Coaching

Evolving the Coaching Culture: Barriers

- Time – At First
- “Minnesota Nice”
- Building Coaching Skills
- Missed Opportunities

Evolving the Coaching Culture: Results

- Talent Pipeline:
 - 240 Former Reference Attorneys in other areas of Thomson Reuters
 - 19 at Director Level or Higher
 - 60 within the SAM Organization
- Change Management:
 - Coaching/Feedback – Open Communication
 - Moved from \$1M to \$10M goal in less than 2 years
 - Gives Employees Voice/Perspective
- Coaching is Contagious:
 - New Opportunities Identified
 - Colleague Coaching
 - Highlights Individual Strengths
 - Natural to our Operation

Open Forum

Q/A