Nailing the Business Context: How and Why to Really Get It Right

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One key differentiator between the Bates ExPI© and, say, the Hogan is that the ExPI is a context-*dependent* assessment while the Hogan and many others is a context-*independent* assessment. The distinction is something that you can and should leverage strongly as an ExPI feedback provider.

When I was first learning to deliver ExPI feedback a few years ago, I often was content to start a feedback call by basically rehashing what the leader had told me about the business context on the orientation call. Is that really so bad? You could argue that simply playing back the business imperatives is still a helpful step. By leading off the feedback call on this note, you're making sure that the business context is top of mind for the feedback recipient… and for you.

Now that I have done hundreds of ExPI feedback calls, however, I've changed my thinking about the business context. I think there's an opportunity to do much, much more with this piece of it. Here are three tips that can add a real "wow factor" for leaders when you deliver ExPI feedback:

1. Prepare for the call by connecting the dots between the leader's context and ExPI results.

When I dig into a leader's report, here are my basic steps:

- Compare and contrast the top five and bottom five facets ranked by each rater group
- Identify blind spots and "happy blind spots"—gaps between self-perceptions and others' perceptions
- Review the highest and lowest-rated items, looking for a sense of the leader's brand
- Take a long look at the five lowest-rated facets, seeing what themes jump out and pinpointing what is and isn't coming across within each facet
- Check out the open-ended comments, looking for color and detail to support themes
- Review the orientation call notes, asking "Given the leader's context, what strengths are already serving them well? Which lower-rated facets are most concerning?"

That last step is quite important, and it gets easier with time. There are only so many business imperatives that you hear on these calls; here are a few of the most common ones:

- Leader needs to show up as more of a strategic partner and trusted advisor, whether to internal stakeholders or to external clients.
- Leader needs to shepherd a team, function, or organization through some sort of transformational change.
- Leader must drive better business results—driving growth, reducing costs, or improving processes, products, services, or the customer experience.

There are others, but these are the ones I hear more often. With those in mind, I often take another look at the leader's ExPI results, seeing how they're doing on several facets that seem to loom a bit larger in light of the business context:

- **Trusted Advisor/Strategic Partner –** Results in the Character dimension will give us insight into how much trust is being experienced for the trusted advisor element. For the strategic partner piece, I will start by looking at the Substance dimensions, paying special attention to the facets of Practical Wisdom, Vision, and Resonance—more or less in that order. The Style dimension will give me some insight into the quantity and quality of two-way communication, giving me a sense of whether people are doing enough to get in front of key stakeholders as well as whether there is some healthy give and take.

- **Shepherd of Transformational Change –** Quoting my colleague Margie Myers, I sometimes tell leaders that "predictability creates calm," particularly in times of change. As a result, I will review a leader's results on Restraint and Composure if they're leading through change. Do people know what sort of leader is going to show up, day in and day out, or are they walking on eggshells because of the leader's volatility? Is the leader a steadying voice of calm during turbulent times? After that, I will look at qualities such as Resonance, Inclusiveness, and Concern. These are all facets that give us a sense of whether the leader is seen as being attuned to others during change, giving them a voice in the change, and actively connecting people's development to the greater good. Vision and Intentionality also can be relevant here—are we clear on where we're going and how we're going to get there? Other qualities can come into play, but I look at those first.

- **Driving Growth/Reducing Costs/Improving Products and Services –** It's harder to generalize about this admittedly big bucket of business imperatives. That said, Vision and Intentionality could be a good place to start here. With Vision, is the leader laying out tangible, attainable, and exciting goals? With Intentionality, is the leader creating clarity and using dialogue to get people aligned on how to accomplish the goals? Our research on innovation also shows that many of the social-emotional facets in the model are more important to driving improvements than you might have guessed. So qualities such as Restraint, Resonance, Humility, Inclusiveness, and Assertiveness can all be important. If the issue is more one of engaging employees to drive these results, I would look at the Concern numbers first, followed by Inclusiveness and Resonance. Which facets loom largest here can depend on exactly what the leader needs to drive and what it will take to get people there.

If you've put in some effort towards making connections between the ExPI results and the business imperatives prior to the call, it will help you make better choices about how to discuss the strengths and which of the lower-rated facets should be prioritized in the discussion.

2. Reframe—don't rehash—what you heard.

Leaders vary a lot when it comes to how clearly and succinctly they can articulate their business imperatives. You can create immediate credibility and even a "wow factor" on the call if you're able to demonstrate the facet of Practical Wisdom by sifting through the complexity of what you heard and reframing it in a way that gets to the heart of what was expressed, focusing on the big picture. I've come to believe that getting this right is so important that I actually script it out before I get on the call. Here are some examples of a few that I've used on recent calls:

- "What I heard in our last conversation was a leader who needs to shepherd people through a time of threatening change in the form of jobs disappearing to India... As the Operations headcount goes down, anxiety goes up... and now you really need to think big.... be more forward thinking... and move people from seeing change as the 'land of threat' to seeing it more as the 'land of opportunity.'"

- "What we heard on the orientation call is a leader who is wrestling with rapid change with technology and customers… what I also sensed between that call and your open-ended comments was that people like you and trust you, but are wanting you to plant your flag in the ground as a real strategic partner who delivers a vision and real insights."

- "What I heard was that your company has a major theme around growth and innovation—trying to figure out where the next great ideas come from… And if I heard you right, that trickles down to you in the form of a whole host of things that you're doing to enhance the client experience with better tools and processes. But there's a tension I heard between trying to enhance the customer experience and dealing with a cost challenge that's driving a trend toward more standardization and less customization. It sounds like a tricky balancing act."

After sharing my reframing of their context, I'll always ask them to confirm whether I've nailed it: "Does that sound right?" or "Does that make sense?" Sometimes people will correct some element of it, but usually they'll agree… and sometimes you'll even hear a "Wow! I really like how you put that!" At best, sometimes you can find a way to capture something that strongly resonates with people but that they have never been able to put into words.

One footnote here: You do have to make sure you ask enough questions on the orientation call to be able to come up with a "meaty" context like the ones above. Occasionally, you may need to start the feedback call with a clarifying question or two to be sure you've got the context just right. Keep asking until you get there!

3. Use the business context as a "lighthouse" for the rest of the call.

To summarize the business context section, I sometimes will explicitly refer to the context as our "lighthouse" for our call. But even if I don't mention it explicitly, I'm always thinking of it that way throughout the one-hour dialogue. In a vacuum, the ExPI numbers only mean so much. What's really important and intriguing is how they can shed light on what the leader needs to drive and where the leader wants and needs to get better.

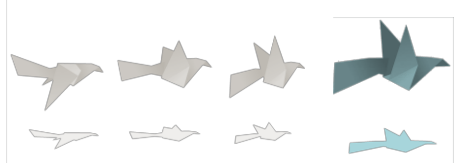
As a result, I'll sometimes say something like this: "Let's think of your business context as the lighthouse for the rest of this call. In other words, when we're trying to decide which strengths really matter and which facets we really want to explore and improve, we're going to use the context as our guiding light. We're going to tether your results to that context, because that's what makes this data so relevant and meaningful."

Whether or not I use that analogy, I'm always trying to tether everything back to that context for the rest of the call. When we review the five highest-rated strengths, I might say things like this:

- "Your highest-rated facet was Integrity. Remember that in the model, Integrity is not just whether you're ethical and do the right thing…. It's also whether you keep your promises and do what you say you're going to do. Given that you're trying to shepherd people through change this year, this is a great strength for you to have: It means that even though there's a lot of churn, people aren't wasting time wondering whether Doug has an ulterior motive or hidden agenda."
- "Another of your strengths was Resonance, which is that ability to be fully present and also very much attuned to what others are thinking and feeling. As someone who needs to show up as a real strategic partner in the coming year, that's a great strength to build on: In order to deliver powerful, relevant insights to others, you first need to understand what matters to them. That's where Resonance is going to serve you really well."

Likewise, you need to tether any discussion of your development themes back to the business context. One way to do it is when you first get people to open up the item-level page of the facet. Here are two examples:

- "Let's take a look at the item-level results for Vision on page 21. Remember that when we're measuring Vision, where talking about a facet that is equal parts strategic thinking and inspiration. Given that we've agreed that you need to rally people around changes to the customer experience in the coming year, this is a facet worth exploring and understanding. What do you notice in your results on Vision?"
- "Let's go to page 23 and check out the data on Intentionality. Now if Vision is the big-picture of where we're going, we can think of Intentionality as vision with a small 'v.' Intentionality is more the tactical side of vision—how do we get people aligned so we can drive execution toward our goals? As you're looking to drive growth in the coming year, this will give us a sense of how you're showing up when it comes to getting everyone on the same page so we can push forward on that goal. What jumps out at you here?"



There are other ways to tie in the business context; you don't necessarily need to hit on the context every time you go into a facet. Sometimes you might go to the facet data first, get the leader talking about what they see, and then tie it back to that lighthouse of the business context. The main point is that keeping the context front and center throughout the call is going to make the leader experience your interaction as that much more relevant, powerful, and important to act upon.

To drive home why nailing the business context is an important part of the feedback experience, here are four reasons why this matters:

- When you prepare for the feedback call by connecting the dots between the ExPI results and the content, you're ensuring that the context will be top of mind for you and the leader throughout the call.
- When you nail the context by expertly reframing it, it's an "early win" on the call that bolsters your credibility.
- When you consistently tether the context to the ExPI data, you drive home that the ExPI is not just an interesting diversion—it's a robust, relevant, and specific barometer that provides real insight into where we are now versus where we need to be.

Helping leaders connect the dots between how people perceive them and how that's helping and hindering them in wielding influence and driving results is a real differentiator for the ExPI and for you as a certified partner delivering ExPI feedback. If you're an internal coach, this makes your work with leaders that much more connected to business impact. And if you're an independent coach/consultant who uses the ExPI, this will help you position your work with leaders as a "must-have" rather than a "nice to have." After all, you're helping leaders figure out how to use influence to drive top-line and bottom-line results.

To get the most out of the ExPI, remember that assessment results only matter so much when taken out of context.