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Wrapping up the ExPI Insights Meeting:

Choosing Key Development Themes, Providing Actionable Feedback, and Concluding the Conversation

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As we've discussed in earlier articles for the Bates ExPI Community of Practice, leaders are eager to rush into discussing the part of the glass that's not full—their development themes. Additionally, leaders are often anxious to hear how to "fix" whatever may be "wrong." Instead, we cover the following steps first:

- Affirming the specifics regarding the confidentiality of the conversation.
- Reframing the business context in our own words and confirming that we have it right.
- Asking for high-level general reactions to the feedback and commenting on the reaction
- Reviewing strengths—connecting them to the business context and asking the leader to comment on how they show up for him or her.
- Exploring the development themes—at least three facets, usually—to deepen understanding of qualities of presence that are not showing up as strongly as they could be in the perceptions of others.

In the final phase of the 60-minute insights meeting—roughly the final 10 minutes—we have five objectives to accomplish:

- Reach agreement on two development themes that seem meaningful to the leader.
- Provide the leader with actionable feedback on these themes.
- Ask the leader to summarize his or her final takeaways.
- Answer questions, including discussion of next steps, if appropriate.
- Send a follow-up note to the leader with any relevant tips and tools—particularly the document on how to follow up with raters,

Let's review each of the five elements.

1. **Reach agreement on two development themes that seem meaningful to the leader**

At this point—50 minutes into a powerful conversation—the leader's head may be swirling to some degree. We've talked about strengths, numerous facets, and several open-ended comments, working together to generate hypotheses and insights. What we now need to do is make sure that the leader doesn't leave the situation with a lack of clarity about how to take immediate action… or feeling overwhelmed about the breadth and depth of what *could* be done to improve perceptions in any number of facets. I often will say outright to leaders: "If I told you to go work on improving 5 or 10 or 15 facets, you'd probably just want to go home, get into bed, and pull the covers over your head! It's just too much. And what we've found is that if you focus on making one boat rise higher in the harbor, several others will rise along with it."

As a result, we need to help the leader narrow the focus. Here are some helpful criteria:

- If you could only improve perceptions on two facets out of the 15, which would have the most impact for the leader in light of his or her business challenges and personal developmental goals?

- Are there one or two "leading threads" that merit consideration? In other words, are there one or two facets that represent the root of the leader's developmental challenge? Can we identify at least one facet for which improvement is likely to lead to improvement with other important facets?

- Are there facets that are so intertwined that we should bucket them together as a theme? For example, maybe a leader has a primary theme of needing to develop Composure. However, your exploration of the other facets revealed a strong link between Authenticity and Vision: Maybe the leader is disinclined to share thoughts, feelings, stories, and life lessons, and this seems connected to lower ratings on the emotional side of Vision. We then may say that Authenticity/Vision is one of the two themes along with Composure.

  Be a little careful with this, though, as I've seen it get out of hand. Just because you discussed Interactivity, Concern, Practical Wisdom, and Appearance, you shouldn't say that Theme #1 is Interactivity/Practical Wisdom and Theme #2 is Appearance/Concern. There has to be a connection to make it a theme… and we also don't want to overwhelm the leader with Here are some facets that do seem to connect often as developmental themes:
    - Vision/Intentionality
    - Practical Wisdom/Vision
    - Authenticity/Vision
    - Resonance/Interactivity
    - Restraint/Resonance

  There are several others, but these come up often.

  Next, we want to reach agreement that we've identified two themes that make sense to the leader. Most often, I'll suggest the two themes rather than take the time to have the leader name them. However, sometimes I'll say something like this: "I think our discussion made it clear that Restraint should be one of your themes… but as for a second theme, I think we can make a case for either Assertiveness or Practical Wisdom. Which one do you think is most important for you to focus on right now?" Either way, it's important for the leader to feel that the two of you have landed on two development themes that seem most urgent and important to address.

2. **Provide the leader with actionable feedback on these themes.**

As we've reviewed in an earlier article in this series, part of the process of exploring development themes is prompting leaders to think of specific behavioral steps they can take to make an impact on improving perceptions on various facets and items. While some leaders are better than others at identifying these steps, it's important to give all the opportunity to do so. Meanwhile, you also will be coming up with your own ideas on actionable feedback during the exploration phase of the conversation, but remember that we suggested that you hold off on sharing those ideas until these last ten minutes of the call: We want to explore first rather than rushing to solve.

But in the last ten minutes, we do want to focus on making the feedback actionable. Remember that in our orientation meeting script, we promised that we would learn about the business context in order to ensure that the process is specific, relevant, and actionable. While building self-awareness is essential in the insights process, we don't want to stop there. We want to wrap up our meeting by making sure that the leader has some initial steps that can be taken toward lasting behavioral change and improving process on the key development themes.

We could write a whole book and still not cover everything that we could share with a leader at this point in the process. Instead, let's cover some key principles and offer some examples. Just to stimulating your thinking, here's what you may be able to tap when providing actionable feedback:

Theories, concepts, tools, mental models

Leaders often appreciated it when you can give them theories, tools, and mental models that they can apply to their specific situation. What you use will depend heavily on what's in your repertoire as a coach, consultant, or talent development professional. Just to give some example, I have seen insights providers share:

- Tools and techniques around critical thinking, active listening, enterprise-wide thinking, analyzing the needs and interests of an audience, running meetings, and sharing stories.

- Theories and mental models such as Hersey-Blanchard situational leadership theory or the Thomas-Kilmann Conflict Mode Instrument (TKI), which can be helpful with the Assertiveness facet.

- Established techniques on how to get input from others when making decisions, running meetings, and having developmental conversations with employees.

Quotes and proverbs

Whether it's a quote of your own or by someone else, sometimes a short and memorable saying will make a concept "sticky" for a leader much faster and better than a mere explanation. Here's a few examples that I use frequently:

- “There’s an African proverb that may be helpful to you: ‘If you want to go fast, go alone. If you want to go far, go together.’ That’s a good proverb to remember when you’re trying to decide whether you need to get others’ input before acting. If speed is the most important criterion, maybe you want to limit others’ involvement or eliminate it altogether. But if you’re in a situation requiring buy-in and you have a bit more time, then you may need to slow down to get people on board.”

- “There’s a saying that I like to use, and you might find it useful to put it up on your bulletin board at your desk: ‘Avoid the void.’ What does that mean? Well, when a leader doesn’t share what he or she is thinking or feeling—whether it’s because they’re low in Authenticity or Interactivity or both—that creates a void in the mind of others. Our tendency as human beings is to fill voids like this, but unfortunately we tend to fill them with negative assumptions about the other party. So if you’re not sharing your point of view or simply failing to get back to me, I’m not going to think, ‘Oh, John is probably really busy with something very important.’ Instead, I’ll start to assume that you don’t care about the topic—or about me… or that you’re too disorganized to respond… or that you’re withholding some bad news from me… or that you don’t have any ideas or opinion at all. These perceptions may all be incredibly inaccurate, but they can get created when we leave a void.”

Stories and anecdotes

I don’t tend to rely heavily on sharing stories or anecdotes, as they are often costly when it comes to time. But there’s no question that this can be a valuable technique. You can use a short story or anecdote to accomplish any number of goals:

- You can model a behavior that you think the leader could and should emulate.

- You can build rapport with the leader and reduce defensiveness by sharing a story of how you addressed a similar developmental theme.

- You can make a concept more concrete, emotional, and visceral for the leader by telling it in a story rather than making an abstract point.

Links to articles and videos

There are countless articles and links that can be helpful to pass along to leaders depending on what issues they’re looking to understand or which facets and items they’re looking to bolster. Here are a few ones you can Google for a representative sampling:

- Susan Cain’s TED talk on introversion
- Simon Sinek’s TED talk on how great leaders inspire action
- My colleague Margie Myers’s blog: “Executive Presence for Introverts”
- A blog of mine: “Why Connection Trumps Precision in Executive Presentations”

Ways to leverage ExPI strengths

Acting on a development theme can feel daunting to many leaders. While there is a school of thought that advises leaders to “fake it until you make it” when it comes to a new behavior, I don’t agree with that philosophy. Telling a reserved, introverted leader to pretend to be highly passionate, fiery, and charismatic seems impractical at best and a recipe for disaster at worst.

A better strategy is to reframe the developmental challenge. Get the leader to see the developmental challenge not as a Mount Everest type of objective but rather as something that’s within the realm of their existing capability.

How do we do that? We look at what’s currently rated high in the eyes of raters and see how we can leverage those qualities to boost perceptions in a developmental area. Here are several examples:

- If a leader is high on a facet or item with one rater group but not others, you might note that this quality is already a strength in the eyes of some—what can we do to extend it to others?

- If a leader is high on Resonance, Humility, or Inclusiveness, these are all qualities that can be tapped to boost Vision. It’s often a matter of reframing Vision: Ask the leader if he or she really needs to create the vision—instead we can leverage these strengths to help pull the vision out of others.

- For leaders who are high on Humility but low on Authenticity, it can be helpful to encourage them to share stories about interesting mistakes, dumb ideas, or awkward moments—all more comfortable to share than achievements for those high on Humility. Alternatively, you can encourage leaders with that profile to share stories that put the spotlight on other members of the team who have contributed to small wins or big goals.

- If a leader is high on Intentionality, this can be leveraged to work on many other qualities: if the leader is good on getting into dialogue with others to create alignment and clarity about next steps, we just need to direct that behavior toward the facet that we’re looking to develop.

- For leaders who are high on Integrity, you’ll find you can use that to your advantage with almost any facet. If the leader is high on the moral side of integrity, you can point out that “doing the right thing” in the eyes of others is probably going to be displaying more of a behavior that they want and need from you. If the leader is high on behavioral integrity, encourage them to make promises about acting on a development theme—after all, they will be likely to hold themselves to it!

Ways to temper ExPI over-strengths

Just as it can be helpful to have leaders find ways they can tap their strengths to work on development themes, it also can be very helpful to remind them that some strengths may be overused and work against other facets that we're looking to develop.

If it's not clear to you or to the leader which facets are over-strength, it can be helpful to focus on what gets in the way of the development theme coming across to others. You may have a good idea about this through discussing the strengths or exploring the development themes, but you also can see what the leader puts down as obstacles on the developmental summary worksheet. You also can ask them a question about it: "What makes it difficult for this quality of Inclusiveness to come across to others? What gets in the way?"

I've written an article on the content portal about over-strengths, so I won't get into the whole topic here… but in the last ten minutes it can be helpful to remind the leader about the concept. I may say something like this: "As you work on developing your Resonance, remember that one challenge is that you're very high on the quality of Confidence: You have that tendency to want to go fast and drive things forward. And you know what? Sometimes you absolutely will want to use that tendency to your advantage. You just don't want to make that your default strategy: If you always go fast, it will work for some of the people some of the time. You want to be more deliberate about it: Is this a situation where I really need to move? Or is this a time when I need to let others weigh in to improve the quality of the decision or to create more buy-in around the decision?"

Common-sense tips

Perhaps the most overlooked aspect of making feedback actionable is the sharing of common-sense tips. For some people who are new to the ExPI, there can be anxiety because of a sense that you don't have a ton of tools and mental models at your fingertips. While your inventory of tools, mental models, links, and so on will grow over time, don't underestimate how much value you can add by simply applying what you've seen work for yourself or with leaders you've coached in the past. What habits, practices, and behavioral tweaks have you seen yield results in the past? These can be great—sometimes even better than a mental model that may not apply as specifically to an individual item. Here are some examples of common-sense tips:

- "For the item about creating clarity around next steps in Intentionality, why not end any meeting—whether one-on-one or in a team—by going around the table to ask people to play back what they're accountable for before the next meeting?"

- "Given that you have a lower rating in Resonance on helping others clarify their thoughts and feelings, why not develop a habit of hitting the pause button a couple of times in a meeting—just to stop and ask people to 'check in' on what they're thinking and feeling about the process or content at that point?"

- “To address that item in Practical Wisdom about always seeming to be a step or two ahead, you mentioned that your inexperience in this industry works against you here. But you don’t always need to have expertise to get people focusing on downstream consequences of a given course of action. Why not make a point of asking people questions that will force them to think a step or two ahead?” Here are some examples:
  - What would good look like for us if we implement this change?
  - What outcomes are we looking to drive here?
  - What obstacles or pushback should we be anticipating if we go down this path?

The domino effect

Whichever of the above strategies you use in the last ten minutes, a nice way to wrap up is to point out the domino effect of focusing on even one or two developmental facets. Sometimes I use this analogy: “If we try to focus simply on making one boat in the harbor rise higher, we can expect that several others will rise along with it, too.” I then might point out some examples for that specific leader:

- “If you improve perceptions of your Resonance, being that much more attuned to others’ needs and feelings is very likely to have a positive impact on other facets, such as Concern, Vision, Inclusiveness. And your ‘wisdom’ will come across as that much more ‘practical’ if you’re keenly aware of what the other party’s needs are.”

- “By focusing on Interactivity, you’re going to increase both the quality and quantity of two-way communication with others. Increasing the quality of that dialogue can improve how people experience your Assertiveness, Inclusiveness, and Humility among other qualities; increasing the quantity of interaction can help just about across the board, as you’re giving people that many more opportunities to experience the 15 facets of executive presence.”

3. **Ask the leader to summarize his or her final takeaways.**

At this point, your hour is just about up, but it’s good to wrap up by asking the leader to provide some final takeaways from the session. In addition to providing a sense of closure, it’s always interesting to see what has struck the leader and what has stuck with the leader among all the things the two of you discussed.

Here’s how I usually ask the question: “To wrap up, I’d like you to reflect on our hour together. I’d like you to think about both the *process* and the *content* of our conversation. Thinking about that, let me ask you: Was this helpful to you, and, if so, what was particularly useful, relevant, powerful, interesting, surprising from our discussion?”

Some leaders will focus more on the process; some will focus more on the content. Some will hit on both. Some will be more expansive and give you quite a synopsis of what landed, while others will be more concise. Jot down whatever they say, taking note of where they are mentally and emotionally at this point in the process. If you feel that they have left out something that seems to be particularly important for them to tackle, you might remind them about that. Otherwise, just thank them for their insights.

4. **Answer questions, including discussion of next steps, if appropriate**.

This is simple. It's a good idea to see if the leader has any questions before wrapping up—particularly if you're delivering the ExPI as a step prior to executive coaching or perhaps a group or team program. You may able to increase clarity and/or reduce anxiety about what's to come if you take a minute to discuss that here.

5. **Send a follow-up note to the leader with any relevant tips and tools—particularly the document on how to follow up with raters.**

I recommend sending a short email to the leader following the insights meeting. Here's a rough outline of what I usually include:

- A very brief summary of what strengths are serving the leader will well considering the business context.
- A reminder of the two development themes.
- Any documents or links that we referred to during the conversation, described briefly in bullets and attached to the email.

In particular, always share the Bates document on why and how to follow up with ExPI raters, and be sure to encourage people to read it and follow it. Remind the leader that research has shown that leaders how have constructive follow-up conversations are more likely to improve others' perceptions. You also may suggest holding off on these conversations if the feedback stung. Another good idea is to start out with people who are likely to be the easiest.

Final Thoughts

Now we've reviewed every step of the insights meeting process. One final thought: I highly recommend that you document what happened during the insights conversation for your records: What facets emerged as development themes? In what ways did they show up as themes for this leader? What did the two of you come up with for steps in making the feedback actionable? What is your assessment of the leader's motivation—is the leader able and willing to make a change? Are there any other specifics worth noting?

Whether you're coaching the leader, working with them in a program, or unsure about next steps, it's great to have these reminders of the valuable work you did together in the insights meeting.