

How CoachingIndex360 Helped make the difference at



THE MANAGERS' STORY

Introduction

This is the story of managers developing their coaching skills and leadership style in Britvic - one of Europe's leading soft drink manufacturers. This new behaviour is being introduced through skills training supported by extensive feedback and on-the-job coaching.

New customer operations team

In 2000 a new 'Customer Operations' Division was formed, with 500 direct employees in its field sales force - plus 300 in merchandising. Tim Roberts, the new Director, set its objectives:

- Delivering continual revenue growth and profit;
- Becoming a role model for leadership and coaching;
- Providing a seedbed for future managers.

For Tim, key to achieving those objectives is to set the direction for the 120 managers, focusing on teamworking and leadership. His aims are: *"to develop an 'enabling', more 'enlightened' management style - to get managers involved in less detail. To do this, managers have to understand their role, and believe in coaching. In this way, people they manage can take more risks and make decisions."* He believes this is best way to deliver continual revenue growth and profit.

A plan for change

Managers talk about a series of actions:

- Clear direction from the top of the division;
- 'Steps to Selling Solutions': a sales approach and training course for all staff;
- Leadership Development Course for all managers, focusing on coaching;
- CoachingIndex360: a 360-degree feedback questionnaire and process, to gather feedback for managers on their coaching;
- On-the-job coaching provided by managers to their teams, primarily during sales visits to customers; and
- Further use of CoachingIndex360 to measure managers' progress on coaching.

John Padwick, Business Development Manager, Frozen Drinks, who has worked for Britvic for twenty years, explained: *"In October 2001 Tim Roberts put together the 'Steps to Selling Solutions' philosophy. This is a training course on sales - to move people from 'manager to coach'. The company had a history of lots of selling solutions, with limited impact. This new approach gives the same training to all sales people."*

David Noble, Equipment Supply Controller, agreed: *"Coaching provides the right foundation to achieve improved business performance. People went through the CoachingIndex360 process twice: in May 2001, and autumn 2002. This provided a benchmark and comparisons of scores."*

Role of coaching and leadership

The 'Steps to Selling Solutions' course provides the basic building block of selling skills development. What is unusual about the Britvic approach is the extensive use of coaching to transfer these skills from training room to workplace. This requires significant development for managers, achieved through the Leadership Course and CoachingIndex360. 'Enabling Leadership: Coaching Skills Workshop' is a two-day course to provide development for managers. Tim Roberts said: *"the whole management team has been put through this course - 70 per cent is coaching, although it is called 'leadership'."*

CoachingIndex360 is an integral part of this course. It provides feedback to managers on their performance, and forms the basis to identify their strengths and weaknesses, and draw up action plans. It is a new experience to receive confidential, quantified feedback from direct reports, and most managers value it greatly. Allison Fincham, Regional Sales Manager, commented: *"you get very valuable feedback from CoachingIndex360 that you wouldn't otherwise get. The 360 model enables people to do that without being victimised."*

CoachingIndex360

Often in organisations there is no structured approach to measuring and improving coaching skills. *"Coaching meetings take time - for those being coached and those doing the coaching."*

"CoachingIndex360 is a good tool to identify what more you could do as a manager"

Above all, you need to answer the question, 'how do I know if this is working?'" explained Valerie Heritage, Managing Director of The Communication Challenge, the company Britvic turned to for help - and which owns CoachingIndex360. *"Feedback is the lubricant that makes coaching work. If you can't measure how well you are doing, then coaching is very hard. Many coaching initiatives fail because they have trouble transferring the initial enthusiasm out of the 'classroom' into the day-to-day work of the manager, losing momentum over time."*

Allison Fincham commented: *"CoachingIndex360 gives people an opportunity to have a say. We use it to get a more open environment, looking at feedback, problems, and solutions. We get lots of positive working practices out of that."*

Valerie Heritage explained: *"Measuring coaching performance does not have to be a matter of gut instinct. Objective standards can be set that allow real comparisons to be drawn between individuals and teams."* CoachingIndex360 covers four areas:

- Attitude -** whether the manager has a commitment to learning and development, and is using coaching to achieve those goals;
- Planning -** whether the coaching sessions are being planned and followed up by the manager;
- Process -** whether the manager is skilled in running the coaching sessions; and
- Relationships -** whether the manager is open to using coaching to build stronger working relationships

"People now realise that getting leadership and coaching right will help business results"

It is surprisingly simple. Respondees go online to view a set of positive statements about coaching, and score the degree to which they agree with them. Valerie explained: "using practical, unambiguous language, these statements get to the heart of the matter - sometimes using quite direct language."

"We now have an environment where no one is embarrassed to admit they have done something wrong"

Using feedback to start the process

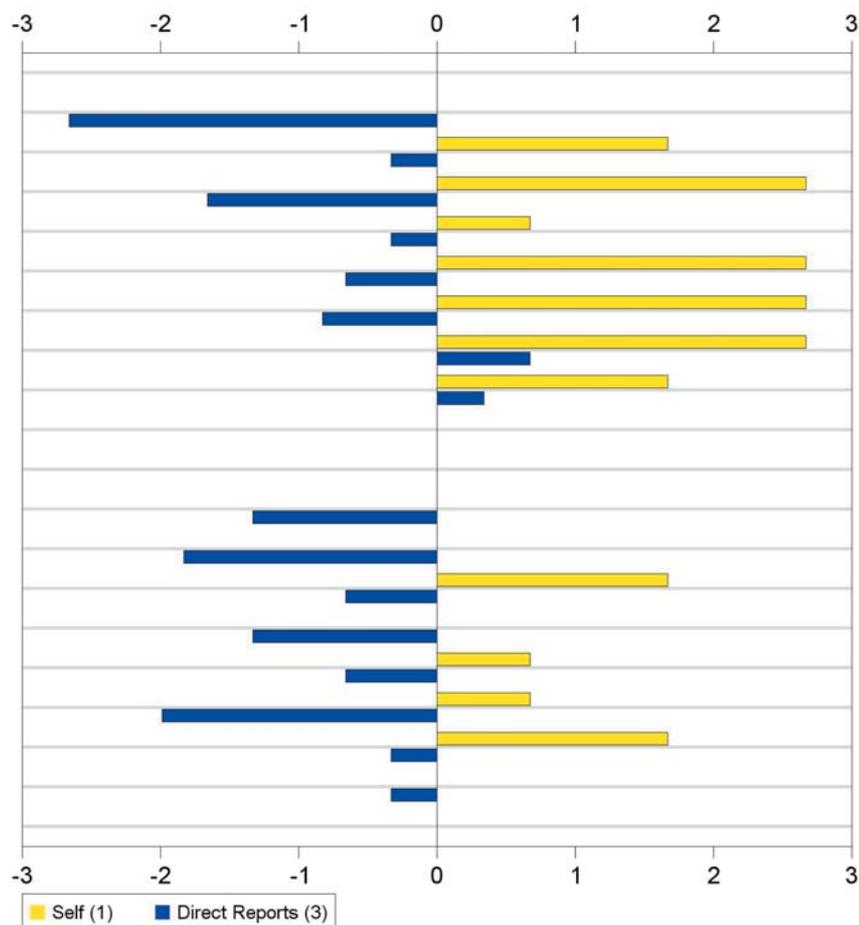
Iain Ogram, Learning and Resource Manager at Britvic, set the scene: *"In Britvic at the start of the development process managers diagnose their coaching skills and development needs, using CoachingIndex360. Each manager selects 4 to 6 staff (direct reports and peers). These staff plus the manager and his/her manager complete the CoachingIndex360 questionnaire."*

David Noble reflected on his early experiences: *"the CoachingIndex360 questions were difficult the first time, because people didn't recognise that coaching had been taking place, nor how to judge other people and provide feedback. So, when using it, there is a need to provide clear guidance to the coach on whom to ask for feedback; it is essential to include direct reports."*

Allison Fincham agreed: *"We need to be clear on the aims of the feedback. You need to take responsibility so that people completing it understand it. The really good thing about CoachingIndex360 is comparing your own scores with the scores your team gives you."*

AN Other, Sales Director - ABC Company Benchmark Comparison: Self vs. Direct Reports

Benchmark: Average Response (4.33)



CoachingIndex360

© The C

Putting CoachingIndex360 to work

Nearly 200 managers in Customer Operations have completed CoachingIndex360. There was a noticeable improvement in performance between 2001 and 2002. Respondees are given 32 'positive statements', and asked whether they agree. The scores are on a scale from 1 to 7; where 1 is 'disagree' and 7 is 'agree'. The higher the score the better the result. The average scores increased by 8 per cent, from 5.09 to 5.49. The changes were:

	Q3 2001	Q3 2002	Per cent increase
Attitude	5.08	5.51	8.5
Planning	4.88	5.33	9.2
Process	5.10	5.48	7.5
Relationships	5.28	5.63	6.6

Iain Ogram commented: *"Interestingly, the largest increases were in the two areas where the scores were lowest the first time. The effect of using CoachingIndex360 has been to provide managers with quantified feedback about their own performance, giving them information on where they need to focus their performance improvement; and by making it clear that this will be measured again, it has provided an incentive to work on those areas."*

Tim Roberts' view is that managers: *"get answers to questions specifically about coaching; they get personal feedback from boss, peers, subordinates, which can be a learning shock; and then the second time it is used, managers find out their progression. It is good there is no jargon, and it is useful to have it broken down into the four areas."*

SECTIONS I & II

ATTITUDE

★	👁️	1	★	(01) Enthusiastically spends significant time coaching
				(11) Sets and encourages the achievement of consistently high standards
✓	❖			(13) Is excited by the challenge of demanding coachees
				(17) Encourages constant learning and experimentation; tolerates well-intentioned mistakes
✓			↔	(20) Promotes the use of coaching
✓	❖	👁️	1 ↔	(21) Creates a positive learning environment
✓	✓	👁️	2	(25) Seeks advice from colleagues about coaching and specific situations
	✓			(30) Demonstrates a genuine confidence in coachee's ability to adapt and be successful

PLANNING

★	👁️	1		(02) Makes time to prepare for each coaching session
★	👁️	1	👁️	1 (03) Agrees roles and learning 'contract' with the coachee
				(08) Is aware of each coachee's performance and potential
★	👁️	1	👁️	1 (14) Plans scenarios on how to practice new skills
				(15) Jointly agrees challenging but achievable objectives for each session
			★	(23) Follows up actions; reviews learning at subsequent sessions
			👁️	1 (29) Provides support to the coachee during their development
★	👁️	1	👁️	1 (31) Listens to what the coachee wants from the session; genuinely seeks to meet those needs

Key: ✓ Strength ★ Development Need
 ↔ Low Consensus 👁️ Not Observed ❖ Gap in Perception

How do Britvic Managers use CoachingIndex360?

The acid test of how well this process improves performance is its use in the workplace. Britvic managers are using the coaching sessions as ways of changing the behaviour of their teams. The CoachingIndex360 output produces results for each manager who has used the questionnaire; as illustrated in the bar charts. Britvic encourages managers to share these results with their teams, and set up regular coaching sessions. Many take place during visits to customers, to provide hands-on sales coaching.

David Noble stressed: *"blocking out time for one-to-ones is crucial. CoachingIndex360 focuses effort and helps make practical progress. Once a month I have one-to-ones, and deal with coaching issues. This is a challenge for me, as the temptation is to get into detail to solve problems."*

Diane Corcoran commented: *"The key is to be up front about it – share the results; don't take it personally; don't be frightened of discussing it."*

John Padwick said: *"Real coaching sessions now take place when visiting customers. I told staff that I was approaching it as a fairly new coach. My previous position as a manager was 'know it all'. I asked my group to adopt coaching – they welcomed this style of management."*

A coachee of another manager confirmed: *"managers are coming out a lot more, filling in the form with feedback, and this is linked into our personal business objectives. This is good because it can lead to a bonus."*

Diane Corcoran's view is: *"The really good thing about CoachingIndex360 is comparing your own scores with the scores your team gives you"*
"I like things that are tangible. In a very measurable bit of the business, we can see what is broken, and then we can fix it. CoachingIndex360 is a tangible and practical way to do people development in a business context."

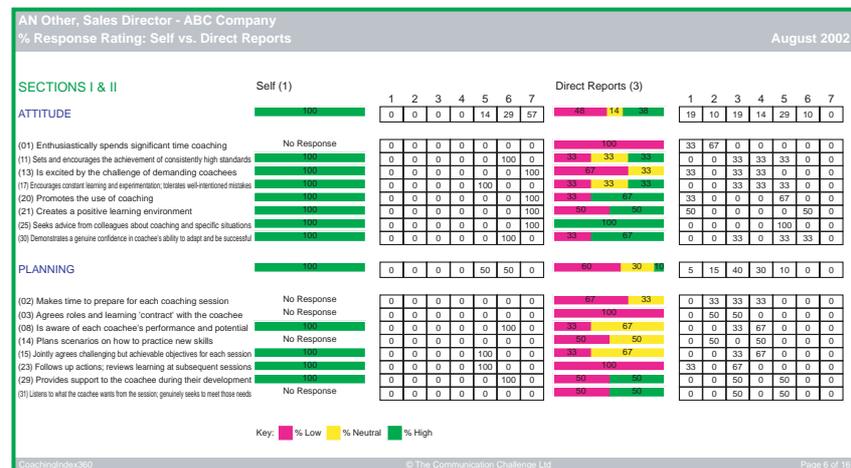
What do Britvic coachees think of this change? Are staff being coached noticing a difference? One manager thinks:

- "Some say okay do it, but then ignore it;
- Some see it as valuable tool, and use it;
- More shift to positive acceptance;
- Lot is driven by the line manager – is there buy-in at the top?

They have found it beneficial and positive – to be given an accessible, easy to use tool. It is always helpful to have a framework rather than a blank piece of paper. It is very easy to use, and to work your way around."

This sums up the general view.

John Padwick thought: *"We now have an environment where no one is embarrassed to admit that they have done something wrong."*



How managers' behaviour has changed

When it began in 2001 some managers said *"what is coaching; I'm a manager, not a coach."* Tim Roberts sees a substantial change in managers' behaviour: *"Previously there was a lot of 'checking' before decisions; there was not enough intellect and empowerment to avoid that. Now it is much better; coaching has helped that."*

David Noble said that the new approach *"has made a big difference to what managers are doing. Britvic has changed in the last few years to invest for growth, and take a longer-term view."*

One coachee said: *"it would be great to have a refresher course on selling. It is great that the line manager is coming out to do coaching on selling skills during customer visits, but it is good to recap and review in the classroom"*.

John Padwick was very open about how his behaviour has changed: *"My attitude to coaching has changed; I thought that just 'being with someone' was coaching. Thought I did pre-planning, but feedback was 'no' – I do that very differently now. My problem is to 'keep quiet in front of customers', and allow staff to make mistakes when selling. I learnt how to contribute in those meetings in a different way – not just jump in. We agree roles before we go into meetings, and what to do with the customer."*

"CoachingIndex360 focuses effort and helps make practical progress"

areas: it provides measures to compare against, and is supported by coaching between sessions. Recording and giving people written feedback is part of the process. For the coachee it is very stretching – they have to ask for feedback, and the coach has to give it. People had to learn feedback skills. I learnt about feedback models and how people receive feedback. People now realise that getting leadership and coaching right will help business results. It is a good tool to identify what more you could do as a manager."

Diane Corcoran's view is: *"I have done CoachingIndex360 three times – my results have improved; whether you improve depends on:*

- Whether you take on board the results and put them into tangible targets;
- How far your manager supports you; and
- Whether there is a platform for review."

Maintaining momentum

An important feature of changing managers' behaviour is sustaining this over time.

David Noble said: *"I've been 13 years in Britvic - for the first time what has not happened is flavour of the month – we have got sustainability in a management development programme. It has not 'withered on the vine', we keep it 'live and fresh' and demonstrate success through the results seen."*

Diane Corcoran was particularly keen to see effective follow up with CoachingIndex360. She said: *"positioning and follow up is very important, to provide additional insight into development requirements. It is linked to the annual review, giving good evidence. My team and I have a development plan; we use CoachingIndex360 as feedback to help select a couple of areas to link into the development plan. Also gives more rounded insight, and 'more tangible statements'. Previously had generic competencies, which didn't fit the business very well. CoachingIndex360 competencies fit better: more pertinent, relevant, specific statements. Could be useful to share results and development areas among peers – but would people be*

open and safe to do this? It helps to gain insight on why people do things – we would need some facilitation of this."

Conclusions

Valerie Heritage said: *"the comments show that CoachingIndex360 has been a valuable process enabling managers to gather relevant, reliable feedback on their coaching skills. The reports are easy to interpret and work with. Being able to review progress on a regular basis is also essential for long-term improvement and to maintain commitment. The process works a lot better now managers and coachees are well briefed on the role of coaching. It also helps that people go on-line to complete CoachingIndex360 – there are fewer queries and a higher response rate. Its use has become more frequent and momentum has built as word has got around that it is well regarded, and helps people to manage and achieve their business objectives."*

The key lessons are:

- Setting the overall context and direction, and providing leadership, captures attention and interest;
- The process of CoachingIndex360 is crucial – it starts the dialogue and keeps it alive;
- Feedback is a basic component of change; having quantified measures of 'soft' areas is helpful and motivational;
- There is much enthusiasm from managers, and a belief that coaching works – that's about leadership;
- It greatly helps that this initiative is not seen as 'flavour of the month';
- This approach to coaching works in a highly commercial, sales-driven environment.

The final comment is perhaps best illustrated in Tim Roberts' words: *"the attitude now is that coaching is widely known and understood as a technique for managing performance. 60-70 per cent of managers understand enough to have bought in."*



CoachingIndex360 is one of a range of feedback tools available exclusively through The Communication Challenge Ltd. CoachingIndex360 helps managers to identify their coaching strengths and weaknesses, and measure performance.

Other Index360 tools currently available cover: team development, managing change, team coaching and work/life balance.

Valerie Heritage, MD of The Communication Challenge Ltd can be contacted on: **0116 259 6896**; E-mail: val@communicationchallenge.co.uk.

Tim Sweet of YKW Consultants, was commissioned to write the case study. He interviewed the Britvic Director leading the change, several managers and coachees, the individual responsible for the leadership development courses within Britvic, and the Managing Director of The Communication Challenge. Tim Sweet helps organisations to manage change, by providing coaching support and leadership development.

Tim can be contacted on: **01264 720550**; E-mail: ts@ykw.com.