Office Influence Assessment Coaching Process

Coach's Guide

Introduction

As an executive coach, independent or corporately employed, our survey, assessment and 360 tool set provides you the information needed to simultaneously expand your client's influence in the workplace, enhance their current job performance, and accelerate their professional success.

Based on Eric Bloom's book "*Office Influence: Get What You Want from the Mailroom to the Boardroom*" and a survey done in cooperation with the University of Northern Colorado, Our founder, Eric Bloom, identified 53 personal and business attributes that positively or negatively affect people's ability to influence others in the workplace. This research is at the heart of our survey, assessment and 360 capabilities.

These attributes are divided into five categories:

Internal Personal Attributes:	Who you are as a person
External Personal Attributes:	Your actions as observed by others
Professional Stature:	Your credentials, achievements, knowledge and experience
Interpersonal Skills:	Your ability to communicate with others
Business Skills:	Your ability at activities, such as negotiation and teambuilding

These tools, designed for both individual and group coaching provide the following value:

For the coach: It provides a systematic way to identify and prioritize the client's specific personal and business attributes needing your coaching expertise.

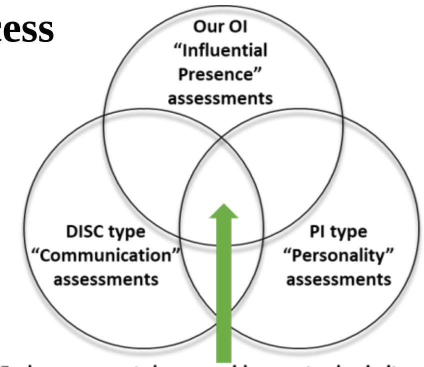
For those being coached: It provides a way to enhance their influence in the workplace at all levels of the organization, including working with investors, board members, peers, staff, business partners, vendors, and key clients and customers.

This coach's guide describes two ways the Office Influence Assessment (OIA) can be used to maximize client skills and simultaneously enhance your coaching practice. They are:

- Integrating OIA into your existing coaching process
- Follow our office INFLUENCE coaching process

These two options are described on the pages that follow.

Integrating OIA into your existing coaching process



Each assessment alone provides great value in its own way. Together they create an unbeatable combination.

Our assessment is complementary to other industry-leading assessments, such as DISC and Predictive Index (PI). DISC primarily assesses your communication style. PI primarily assesses who you are as a person.

Our Office Influence Assessment (OIA) analyzes and facilitates the enhancement of the personal and business attributes needed to maximize your client's influence, effectiveness and productivity in the workplace.

As a result, consider OIA to be an additional diagnostic tool used to analyze the client's personal and business attributes, rather than their personality, preferred communication styles, and other related items.

Certainly, feel free to include OIA at any phase of your coaching process you feel is best. We suggest that you continue use your standard diagnostic assessments, such as PI and DISC, first to gain an understanding of your client.

Then, with this client knowledge in hand:

1. Use OIA to provide the client the opportunity to do a self-assessment on 53 personal and business attributes that we have identified that enhance or detract from their ability to influence others in the workplace.

2. Use OIA 360, to provide the client with an external view from their staff, peers and manager on the same attributes

3. Combine the client's goals/objectives, OIA recommendations, IOA 360 result, and the IOA Instructional Suggestions Report to craft a custom coaching plan for your client.

Our office INFLUENCE coaching process

I - **Identify** *goals and challenges via discussion, assessment, and 360*

N - **Name** *specific areas of concentration, success factors, and measurements*

F - **Formulate** *a coaching plan*

L - **Link** *goals and objectives to specific activities and outcomes*

U - **Utilize** *assessments, tools, concepts, and processes*

E - **Enhance** *client's skills, brand, and organizational influence*

N - **Navigate** *challenges and obstacles*

C - **Calculate** *and measure progress*

E - **Establish** *future steps and ongoing professional growth*

Our nine-step INFLUENCE coaching process is described below.

I – Identify:

The process begins by meeting with the client to understand their coaching goals, strengths, challenges and career aspirations. This knowledge is then enhanced via the results of their Office Influence Personal and 360 Assessment.

Step 1: Meet with the client to discuss their **coaching goals, strengths, challenges, and career aspirations**.

Step 2: Ask the client to take the **Office Influence Assessment** (OIA).

Step 3: Ask the client for the information needed to administer the **OIA 360 survey.**

N – Name:

Based on the information collected in the prior step, this step defines prioritized areas to enhance, including their critical success factors and measurements.

Step 4: Read the client's OIA, OIA 360 and the Instructional Suggestions report to **prepare yourself for the debrief with the client.**

Step 5: Present the finding of the OIA self-assessment and OIA 360 to the client.

Step 6: Work with the client to **prioritize** the areas the client would like to enhance.

Step 7: Work with the client to define the **Critical Success Factors** (CSFs) of each area and the specific measurements to assess their success in the eyes of the client.

F- Formulate:

This step formulates a preliminary plan including milestones, timing, and desired outcomes. The plan is "preliminary" because as the coaching process moves forward other important areas of concentration may arise and/or priorities may shift.

Step 8: Work with your client to develop a **preliminary action plan** for the length of your coaching engagement. If all the client enhancement areas cannot be addressed within the coaching timeframe, at a future time, the client can decide to extend the engagement or complete the plan on their own.

L - Link:

This step connects the plan in the previous step to specific activities, assessments, tools and discussions to help move toward the desired outcomes and overall coaching goals.

Step 9: Based on your coaching knowledge and experience and the client's desired goal, strengths, challenges and career aspirations, enhance the plan defined in the previous step to **include the specific tools and activities** needed to attain the client's CSFs, using their defined measurements as a guide.

U – Utilize:

Begin utilizing the activities, assessments, tools, and discussions defined based on the prioritized list of defined topics.

Important: Steps 10a, 10b, 10c and 10d are a continuous loop on each area of desired client enhancement

Step 10a: Using the defined activities, assessments and tools, work with the client to meet their coaching objectives as defined in their previously created prioritized list.

E – Enhance:

Begin addressing specific workplace scenarios and business challenges using the knowledge and skills gained.

Step 10b: Where appropriate as defined by the client, employ the skills and knowledge gained in step 10a to **address actual business challenges** and move toward the client's coaching objectives.

N – Navigate:

Identify and work to remove or mitigate challenges and obstacles that are blocking the way toward meeting desired business and coaching objectives.

Step 10c: At the client's request, work with the client to **remove or sidestep obstacles** that are preventing them from moving forward.

C – Calculate:

Look back at the initial coaching goals and objectives, calculate their progress, and make adjustments.

Step 10d: Continually refer back to the client's initial objectives, CSFs, measurements, and plan to assure the client's initial goals are being addresses. If the client wishes to make modifications based on the passage of time, changing business scenarios, and/or the client's overall progress.

E – Establish:

As the coaching process draws to a close, define a list of professional growth-oriented activities and resources that ensure progress occurs on an ongoing basis.

Step 11: Work with the client to **define activities, resources, and tools** that they can use on their own to help assure their continued growth and success.