Precision Coaching and Development with the CPI 260® Assessment

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Two weeks after successfully graduating from the CPI 260® Certification Program, Joshua, an executive coach running his own consulting practice, enthusiastically accepts a coaching assignment with George, the chief financial officer of a health insurance firm. Joshua is briefed that George is seeking to improve his leadership skills with the aim of moving into the CEO role. Joshua gets agreement from George to take the CPI 260 assessment as part of the coaching process, and he is surprised to see that George's CPI 260® Coaching Report for Leaders lists 16 areas, out of 18, requiring development. Joshua begins to wonder how George would respond to seeing these results. How can he ensure that the discussion with George is constructive? How can he best use the information in the report to assist George with his development?

Sophie, an experienced organizational development consultant, works on the coaching faculty of a highly regarded executive business school. Since becoming a certified CPI 260 practitioner a year ago, Sophie has been amazed at how insightful and illuminating the results of the CPI 260 assessment are for clarifying her clients' leadership strengths and developmental needs. Sophie recently began coaching Charlotte, a junior scientist in a pharmaceutical company who has been encouraged by her company to improve her interpersonal and leadership skills. However, Charlotte's CPI 260 results indicate strengths in these areas, with no clear developmental needs. Sophie is unsure about how best to use the CPI 260 reports when coaching Charlotte.

BUILDING COMPETENCE, CONFIDENCE, AND COMFORT WITH THE CPI 260® ASSESSMENT

Although the scenarios described above do not occur frequently, they are drawn from real experiences of coaches and consultants using the CPI 260 assessment, a highly regarded personality instrument. These scenarios may occur when a coach is using not only the CPI 260 assessment but potentially any kind of psychological instrument as part of leadership development, executive coaching, or individual performance improvement initiatives. While it is natural for a coach to feel somewhat puzzled or even challenged when encountering such situations, these situations more often present useful learning opportunities for both client and coach.

This paper builds on knowledge and techniques you (the coach/consultant) have acquired in the CPI 260® Certification Program and aims to offer further insights and strategies for utilizing the CPI 260 assessment and its related reports—the CPI 260® Client Feedback Report (CFR) and the Coaching Report for Leaders (CRL)—as part of your clients' development. I will cover tried and tested ways for introducing the CPI 260 assessment to coaching clients, exploring results, working with "tricky" profiles, and linking results to developmental actions.

SETTING THE SCENE FOR CPI 260® ASSESSMENT AND FEEDBACK DISCUSSION

Establishing with your clients what they can expect to learn from the CPI 260 assessment is crucial to setting the scene and fostering in them an openness to exploring the insights offered by the assessment. As a coach, it is important that you develop a way of explaining how the assessment works that is comfortable for you and, where possible, minimizes technical jargon for your clients.[1] This prepares you and your clients to apply CPI 260 results for their situation. Here's an example of a brief, nontechnical explanation:

> *The CPI 260 assessment measures a number of personality characteristics that can be observed to play a part in everyday situations, particularly in the workplace. It is designed to provide an accurate description of you, the same way a person who knows you well would describe you. This includes a candid description of both your favorable and unfavorable characteristics. It is based on more than 55 years of research and is used as part of development with people and organizations internationally. By exploring your results on the CPI 260 assessment, it can help you understand how aspects of your personality influence your approach to work-related situations and discover ways you could improve.*

Some clients may have more specific or technical questions about the research and development behind the CPI 260 assessment. In these situations, it is important that you are familiar with and able to discuss or locate information that addresses your clients' questions.[2] Indeed, it is any assessment user's responsibility to be aware of the research relating to the reliability and validity of the instrument and any potential limitations it may have. This ensures that the coach interprets the instrument in a competent and ethical manner.

Other clients may have concerns that CPI 260 feedback will reveal problems about which they were previously unaware. While this is a legitimate concern for some, it is usually helpful to reassure clients that increasing their self-awareness is the start of their development journey. When this issue has been raised or become apparent with my clients, I have found it helpful to discuss the following questions before moving ahead with interpretation of results:

- *Are you clear about and satisfied with the confidentiality arrangements we have in place regarding your CPI 260 assessment results? If not, what would need to happen for you to be comfortable and satisfied?*
- *What would you hope to learn as a result of going through a discussion about your CPI 260 assessment results today?*
- *What aims, hopes, or goals do you have for your current role/career/life? Are there any areas you think you could further develop to achieve these goals?*
- *What kind of professional development, if any, have you undertaken previously? What did you learn from the experience?*
- *How would you describe your experience completing the CPI 260 assessment?*
- *Is there anything I can do in this discussion that would assist you?*

- *Is there anything else we have not discussed that would be relevant when considering your CPI 260 results?*

These suggested questions provide clients with an opportunity to offer a context for how they can use the information from the CPI 260 assessment and feedback discussion. They also create room in the session for you and your client to establish a level of trust and rapport, which are crucial for coaching.

Clarifying your ethical and professional responsibilities to clients also adds to increasing comfort and openness during the feedback discussion. Here are some examples of responsibilities you can address with the client:

- *I want to assure you as part of my professional responsibilities that I will be maintaining the agreement about the confidentiality of your CPI 260 assessment results and the content of our feedback discussion.*
- *While I am qualified to interpret the CPI 260 assessment, I am not an expert on the topic of "you." You are the expert about you, and I will be asking you today how accurate you think the assessment results are and how they relate to your experiences.*
- *The CPI 260 assessment can offer powerful objective insights about how you see yourself and how others typically see or experience you, and I encourage you to share any other information that would help us better use the results to support your development. No single assessment can explain every instance of behavior in every situation.*

INTEGRATING THE CPI 260® REPORTS IN DEVELOPMENT

By using information from both the CPI 260® Client Feedback Report (CFR) and the CPI 260® Coaching Report for Leaders (CRL) in tandem, you can enable clients to increase self-awareness of their personality style and implications for their development. The CFR gives you and your clients a picture of their underlying personality characteristics. It requires interpretation and feedback by the practitioner with opportunities for clients to verify or question their results. The CRL is designed to augment the CFR by highlighting clients' potential strengths and developmental needs with respect to a range of leadership characteristics.

Coaches and consultants using the CPI 260 reports frequently confirm that using the CFR and CRL reports in tandem is the optimal way to assist clients. This is the case when clients are not only involved in leadership development but also developing interpersonal skills such as influencing, decision making, and team-related behaviors.

Starting with the Client Feedback Report

To extract the maximum insights from these reports, it is recommended that you first take clients through the CFR and help them learn about their results on individual scales and interactions between the scales. A valuable skill you can bring to the feedback discussion is helping clients understand how their results on individual scales relate to the "very high" and "very low" behavioral descriptions. For example, when looking at a result on the Dominance scale, you might offer the following description:

> *The Dominance scale measures the level of comfort or willingness to influence or lead others and take charge of situations. People who score at the high end of this scale typically appear assertive and confident, enjoy influencing others, and are often focused on getting things done. People scoring at the very high end of this scale may appear domineering. People who score at the low end of the scale may appear unassuming and mild-mannered. They may prefer a role or job that does not require them to take on responsibility for leading others. People scoring at the very low end of the Dominance scale may appear unassertive and avoid assuming positions of responsibility. Let's take a look at where your score falls on the Dominance scale. How accurate do you think this score is for you?*

This approach enables clients to

- Learn what each scale measures
- Verify the accuracy of their scale results
- Explore how combinations of scales work in concert to describe their overall behavioral patterns
- Discuss with the coach why they may view themselves differently from what is portrayed in their profile

On occasion clients may strongly disagree with the interpretation and description in their CFR, which may present a challenging situation for some coaches. However, these situations typically present an opening for clients to better understand their "self-concept." Encouraging clients to describe the reasons why they disagree with their result and offering examples of situations where their behavior aligns with their self-concept is important. In such situations you might ask the following sorts of questions:

- As you have said you do not agree with the result on this scale, can you think of some examples of situations where you behaved in a way that differs from what is indicated in your report?
- Do these examples reflect what you would do in most situations?
- How would people who know you well describe you in these situations?

It is not uncommon for clients who on first read disagree with a scale result to subsequently corroborate the result following further explanation about the scale from the coach. Explaining and reviewing descriptions of the scale result in question with clients can also help them calibrate the meaning of their scale score.[3] However, you should be mindful that it is clients who ultimately confirm whether the result is accurate for them or not.

Building Insight with the Coaching Report for Leaders

Once you and a client have reviewed the CFR, you are in a position to introduce the Coaching Report for Leaders (CRL). This report links clients' personality style to 18 *leadership characteristics*. It also offers useful insights for people who are engaged in development outside specific leadership roles—such as interpersonal skills development, career guidance counseling, succession planning, or performance improvement.

The CRL was developed and written to offer clients a user-friendly and practical way of understanding how their personality style shapes their leadership behaviors. While you may not need to offer the same level of interpretation and explanation required with the CFR, you should be comfortable providing a brief explanation about how results in the CRL (i.e., *strength, developmental need,* or *area to explore*) are produced. A key feature of the report is letting clients know that they are being compared to a large sample of executives and managers (5,610 individuals).[4] This comparison sample provides a realistic basis for clients to gauge how similar or dissimilar their personality characteristics and resulting behaviors are to those of a group of "on-track" managers and executives.[5] This helps identify their strengths and developmental needs in a leadership role.

From research and experience, it is common for most people (on average, 79%) to have at least one developmental need indicated in their CRL, while the vast majority (98%) have at least one strength indicated in the report.[6] In most instances, you can count on the CRL providing information that leads to discussions with clients about both their strengths and potential areas to explore or improve. So what happens if you are faced with the kinds of CPI 260 reports our coaches Joshua and Sophie were presented with?

CHALLENGING OR "TRICKY" CRL PROFILES

A realistic concern some coaches have is how to deal with CRL profiles that appear to have information that is challenging to use for planning development with the client. The following sections offer guidance and tips on how to deal with "tricky" profiles when using the CRL.

Working with a Coaching Report for Leaders Indicating Few or No Strengths

You may recall that Joshua's client George had only two areas, out of a possible 18, indicated as strengths in the CRL. How would you best use this information with the client if you were in this situation?

By checking whether clients agree with the results and interpretations of their CFR, you allow them to appreciate how a small number of strengths may be indicated in the CRL when comparing their profile to a group of on-track managers and executives. However, when clients are still puzzled as to why their CRL does not indicate many, or any, strengths, you may want to explore this further using the following sorts of discussion points:

- *As we look at the list of 18 leadership characteristics covered in the Coaching Report for Leaders, I would like you to consider which ones are the most important in your role. This may help you decide how to prioritize them in your development.*
- *Let's take a look at the description and result for the leadership characteristics in the body of the Coaching Report for Leaders [see pages 4–13 of the report]. Have you received any feedback from others that is consistent with the descriptions in your report? If you have not received such feedback, who could you ask to get their perspective?*

It can also help to clarify with clients how their personality scale results in the CFR may have shaped their results in the CRL. Following are two key points for discussion that may help your clients' understanding.

- Compare the client's leadership role and responsibilities with those of the CRL norm group of leaders. For example, you could state the following:

  The Coaching Report for Leaders presents results by comparing your CPI 260 profile to those of a large sample of executive and managerial professionals. Where your profile results differ from this sample, your report will generally indicate that this is a developmental need or an area to explore further. How would you see your leadership role relative to that of other executive and managerial professionals? Are there leadership characteristics in this report that are more important than others in your role?

- Explore the CPI 260 scales used to generate results on specific leadership characteristics in the CRL. For example, you could state the following:

  The CRL uses a combination of two CPI 260 personality scales for each of the 18 leadership characteristics. For example, leadership characteristic 7, Decisiveness, is based on where your scores fall on the Dominance and Independence scales of the CFR.[7]

  Leadership Characteristic 7
  Decisiveness

Independence \ Dominance	Low	Mid	High
Low	14	8	<1
Mid	7	40	9
High	<1	10	12

  Strength · Developmental Need · Area to Explore

  The Dominance scale is used to profile four of the CRL leadership characteristics (i.e., Use of Power and Authority, Decisiveness, Handling Sensitive Problems, Influence). So, if your Dominance score differs from the norm sample (i.e., was higher or lower than that of most executives and managers), your CRL profile is likely to indicate a developmental need result for these four leadership characteristics. This is also the case for a number of other CPI 260 scales. If it helps, we can explore which scales were used to produce results on each of the 18 leadership characteristics by referring to Table 3 of the CPI 260® Coaching Report for Leaders User's Guide. *Once we have done this, I would be interested to hear how you think your results may play a part in your approach to leadership.*

The purpose of discussing these points is to help clients understand not only the results in their CRL but also the underlying personality characteristics that influence their leadership behaviors and raise their awareness of approaches that could improve their effectiveness as a leader. In this way the CRL is designed to help clients focus on what is most important for their development and to take action.

A further point to note is that the majority of clients are able to acknowledge or are already aware that some or many of the areas identified as a developmental need in the CRL are challenges they are facing. In these situations, clients are reassured that the CPI 260 reports have validated their developmental needs.

Working with a Coaching Report for Leaders Indicating Mostly or All Strengths

Our other coach, Sophie, was presented with Charlotte's CRL indicating mainly strengths and no clear developmental needs. What would you consider doing if you were the coach in this situation?

The good news is that most clients show little concern, or do not readily complain, about receiving a CRL indicating mostly strengths. However, as coach, you may be concerned about how you can engage such a person in further development. It is still helpful to spend time reviewing the CRL with clients and ask them to validate and provide examples of the indicated strengths. Encouraging them to explore and consider whether an indicated strength is currently effective or being overused can also highlight a hidden developmental need. A salient example of the benefits of this type of exploration was apparent with a client I coached, the CEO of a marketing organization. This client prided herself on the benefits of her "well-developed level of Decisiveness" in her role as CEO. She also acknowledged in the coaching sessions that her husband and children told her she was "*too* decisive" when interacting with her family. She stated that this was one of the most useful development insights she attained from taking the CPI 260 assessment.

The kinds of questions useful for exploring overuse of an indicated strength (using Decisiveness as an example) include the following:

- *Your report indicates that Decisiveness is likely to be a strength for you in leadership. Are there examples you can describe where this is the case?*
- *If you do view Decisiveness as a strength, are there other situations where your level of Decisiveness may have been less effective or even worked against you?*
- *How does your level of Decisiveness affect your approach to delegation, getting buy-in from others, or collaboration?*
- *How do other people experience your approach to Decisiveness? How do you view other people's approach to Decisiveness, and how might this affect your interactions with them?*
- *Are there times you may need to modulate your Decisiveness to attain a better outcome?*
- *How does your Decisiveness fit with the cultural norms of your organization, team, or role?*

Exploring the effect and appropriateness of clients' reported strengths gives them an opportunity to identify ways they can further apply their strengths or modulate them to suit the requirements of their role and the people with whom they interact.

FROM AWARENESS TO ACTION

When clients identify areas for development, you can enhance their motivation to address these areas by reinforcing that the CRL describes behaviors that can be learned, practiced, and developed. From experience it is unrealistic for an individual to focus on developing more than two leadership behaviors at any one time. Furthermore, it can take months or years for some people to feel comfortable and confident exercising new behaviors. Therefore, in this stage of coaching, encouraging clients to factor in the following kinds of prompting questions in their development plan can support their motivation to take action and persist with new approaches that may be out of their comfort zone.

- *What have you learned from your CPI 260 reports about the skills and strengths that have helped you get to where you are today? How can you use these strengths to support your development objectives?*
- *In considering your CPI 260 results, what are one or two areas that would be most important for your development? What would be an action you could undertake this week to begin your development?*
- *Both helpful and unhelpful habits can take time to develop. Once formed, they can take just as long to change. What time frame will you need to feel comfortable with new approaches and behaviors? Are there any new approaches you could try to get some quick wins?*
- *How will you be able to check your progress? With whom could you consult to get further feedback about what is working and what requires further improvement?*
- *What will it look like to you when you have been successful with your development? How can you keep this image top of mind as you embark on your development?*

The CRL also offers a useful development model that clients can use to further inform how they engage in development. Page 2 of the CRL shows how the leadership characteristics are organized into the five Core Performance Areas:

- Self-management
- Organizational Capabilities
- Team Building and Teamwork
- Problem Solving
- Sustaining the Vision

As stated in the CRL, these performance areas range from basic leadership skills (e.g., Self-management) to more sophisticated leadership skills (e.g., Sustaining the Vision) that are typically required in senior and complex leadership roles. Highlighting this sequence for the Core Performance Areas helps clients identify which leadership behaviors need to be developed first and which can be developed at a later stage.

As a coach using the CPI 260 instrument for nearly 20 years, I have benefited (as have my coaching clients) from the illuminating and practical insights offered by the assessment. Listening to and observing my clients as they digest, explore, and use the information they glean from the CPI 260 reports has provided me with insights that enrich my coaching practices. I hope you experience the same benefits.

NOTES

1. See *CPI 260® Certification Program Participant's Resource Guide* (Mountain View, CA: CPP, Inc.), appendix F; Robert J. Devine, *CPI 260® Client Feedback Report Guide for Interpretation* (Mountain View, CA: CPP, Inc.), chapter 5; and Sam Manoogian, *CPI 260® Coaching Report for Leaders User's Guide* (Mountain View, CA: CPP, Inc.), part 1.

2. See *CPI 260® Certification Program Participant's Resource Guide;* and Devine, *CPI 260® Client Feedback Report Guide for Interpretation.*

3. For scale descriptions, see *CPI 260® Certification Program Participant's Resource Guide;* Devine, *CPI 260® Client Feedback Report Guide for Interpretation;* and Loring W. McAllister, *A Practical Guide to CPI™ Interpretation* (Mountain View, CA: CPP, Inc.).

4. See *CPI 260® Certification Program Participant's Resource Guide;* and Manoogian, *CPI 260® Coaching Report for Leaders User's Guide.*

5. *CPI 260® Certification Program Participant's Resource Guide.*

6. Devine, *CPI 260® Coaching Report for Leaders Advanced Guide for Interpretation.*

7. Figure from Devine, *CPI 260® Coaching Report for Leaders Advanced Guide for Interpretation*, 12.

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Martin Boult is divisional director of Professional Services and International Training at CPP, Inc. Martin leads consulting assignments and certification programs for CPP's range of psychological instruments throughout Australia and the Asia Pacific region. He also heads the development of certification training programs internationally for CPP Inc., including the programs for the MBTI® and FIRO® instruments. He is a member of the Center for Creative Leadership's Certification faculty. Martin attained a doctorate in clinical neuropsychology and is a registered psychologist who has worked in both clinical and organizational settings for more than 17 years. He has delivered consulting assignments to a range of leading public and private sector organizations in Australia, China, Singapore, India, Hong Kong, New Zealand, United Arab Emirates, Malaysia, Thailand, and South Africa. Martin's areas of specialization include executive leadership development, team development, organizational strategy, talent development, and psychological assessment for recruitment and selection.