

Assessments Are an Essential Part of The Delta Associates' Executive Coaching and Consulting

A Case Study of The Delta Associates

Carol Kallendorf, PhD, of The Delta Associates, is a top-level business coach who counsels brain surgeons on career change and CEOs on how to achieve teamwork and plan for growth in their organizations. People tell Kallendorf not just their business problems but also their personal hopes, dreams, and fears. She becomes their counselor and, often, their mentor.

How does Kallendorf do this with executives who are time-starved, results-focused, and often reluctant to reveal or even admit to having personal feelings and concerns? "Most of my clients would not sit still for therapy or acknowledge their need for a mentor. I have found that starting an engagement with high-quality assessments that have a clear business rationale is the most efficient way to address their business needs. And, in many cases, personal needs that affect their business life come to the surface naturally. There are validated, research-based assessments that can be used to jump-start almost any consulting engagement, whether it is coaching an individual manager, helping a team, or training an entire tier of middle managers."

"We regularly use the Myers-Briggs®, FIRO-B®, and CPI 260® instruments. We have developed our own 360-degree assessment that we customize for clients, and we occasionally use the *Strong Interest Inventory*® assessment."

Participants begin by taking one or two assessments, online if possible, and receiving personalized feedback. Kallendorf observes that "the payback is immediate when my clients and I can focus right off the bat on what really matters in terms of the business problem." And the side benefit of new personal awareness can be just as important. "So often we get an immediate 'aha!' reaction to an assessment. Clients are likely to see

themselves revealed in a way that encourages them to acknowledge and bring forth their own needs."

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Why is this important? "Self-understanding is so often the key to recognizing how others see and react to us, and that is essential for managerial and team effectiveness. When clients extend these insights to their personal lives, the connection between personal satisfaction and business success is highlighted."

In one case, The Delta Associates was brought in to help a call center's management team work more effectively. They used multiple assessments to probe for problems and identify opportunities for improvement among the 13 managers.



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Low resilience scores on the CPI 260 instrument for four of the managers provided the insight necessary for Kallendorf to identify stress issues. The four were immensely relieved to have the nature of their stress explained and discussed. The senior manager, whose Myers-Briggs personality type indicated she was unlikely to have been aware of or sensitive to her subordinates' concerns, was completely surprised by the findings and eager to help.

Kallendorf prescribed specific training exercises to address the management team's needs. Some jobs were restructured to fit the specific managers better. And the results? In this formerly high-turnover call center, retention has significantly improved at the management level and among the customer service specialists they manage. With a dramatic track record of improving retention, the senior manager has cemented her stature inside the organization.

In another case, Kallendorf used assessments to provide individual coaching to the presidents of several geographically separate business units in a manufacturing company. Results included

- Helping one individual understand why his interpersonal style had gotten him fired from a previous job in spite of business successes—and how to avoid the pitfalls this time
- Bringing to the surface a president's stress resulting from the conflicting demands of work life and home life—and developing a plan to solve the problem
- Helping an individual rediscover his passion for horseback riding—just the outlet he needed

This is where Kallendorf's own experience helps her make the point that there is a strong connection between personal needs and business success. You see, Kallendorf took up boxing after she turned 40. She now follows a very serious training regimen and faces very serious opponents, including the reigning women's flyweight world champion. "Most executives, no matter how good at what they do, need a passion outside their work life. For me, it is boxing," says Kallendorf. "To succeed in business, one must not only put one's business life in order but also integrate success on the job with personal fulfillment outside the workplace."

"We have built a reputation for bringing our clients expertise and saving them time," says Kallendorf. "Assessments are essential for both halves of this equation. They enable us to customize our coaching and training for each client while saving the client (and us) a great deal of time."

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Once they have experienced assessments in practice, Delta's clients frequently look for applications that go well beyond self-awareness. One client organization has given its salespeople training in Myers-Briggs psychological type in order to help them take the approach most likely to be effective with prospective buyers. Another client, a major law firm, uses knowledge of psychological type to aid in jury selection and in presenting its cases. Delta has developed a 360-degree feedback instrument specifically for use by venture capital and angel investors. And it is helping a growing number of its clients use pre-employment testing customized to their needs.

For Kallendorf, using assessments as a core element in her work comes naturally. "I love teaching, and I'm in a business where I must know both the needs and the learning style of each and every 'student.' I would be far less productive and effective without assessments."

The Delta Associates uses the following assessments regularly in its consulting and coaching practice:

- *Myers-Briggs Type Indicator*® (MBTI®) instrument—the most widely used assessment of psychological type preferences. A great door opener, because many have heard of it and most find their own portrait very revealing.
- *Fundamental Interpersonal Relations Orientation–Behavior*™ (FIRO-B®) assessment—helps people understand their own and others' behavior. Very powerful for managers and teams when used in conjunction with the MBTI assessment.
- CPI 260® instrument—employs 18 different scales to help users understand how others see them. The Coaching Report for Leaders is particularly useful for interpreting the results for managers and executives.

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