

**Sample Guide for 30 minute Stakeholder interviews**  
**Use appropriate questions to situation.**

Interview Guide for Assessments

Name of Interviewee: \_\_\_\_\_ Date: \_\_\_\_\_

Title of Interviewee: \_\_\_\_\_

Relation to Coachee: \_\_\_ Boss \_\_\_ Subordinate \_\_\_ Peer \_\_\_ Other \_\_\_\_\_

Introduction:

- The coaching process involves a leadership assessment and confidential interviews
- I'll summarize a number of interviews into an aggregate report to help me identify areas of development needs – from self-assessment, 360 surveys, this interview and direct report surveys
- I'll be taking notes, so I may ask you to repeat at times
- We will spend about 30 minutes
- This is important and your information will be very useful to the process
- This will remain completely confidential – If there is something you say that can identify you, let me know since it may show up on the RITA
- Please be open and candid during the interview
- Any questions?

1. Provide some context for how you have worked with (Coachee) in the past? How much contact have you had with (Coachee) over the past 12 months?

2. Describe the expectations you have for him/her in their role?

- a. What are his/her business priorities in order of importance over the next 12 months?

3. Describe how he/she develops and maintains relationships.

- a. With you? – Describe personal vs. business relationship strengths.
- b. Peers? Who specifically?
- c. His/her team? How does he/she handle supervision?

4. What have been the Coachee's greatest contributions to the organization in their current role? Tell me about some times when he/she has done great work that has significantly impacted this company's performance.
  - a. How did he/she accomplish these successes?
  - b. What suggestions do you have for Coachee that would allow him/her to contribute beyond what has been done so far?
5. What are his/her key strengths?
6. What are the areas in which his/her effectiveness can be improved?
  - a. Could you give me examples of how each of these areas shows up?
  - b. What behaviors did you see?
  - c. Is there a pattern to these behaviors that you think could be there?
7. What does he/she do that sometimes makes it challenging for others to be successful?
8. How does he/she delegate, develop, and empower others?
9. How does he/she handle performance issues?

10. **FOR BOSS:** What future roles do you see for Coachee in the next two to three years?

- a. Under what conditions do you think that he/she would be ready for a move?
- b. What happens if Coachee does not change his/her behaviors?
- c. What developmental areas could you see Coachee strengthening in order to prepare himself/herself for emerging responsibilities?
- d. If he/she could change only one thing, what should that be?

11. If you were coaching Coachee about his/her role, what would you recommend he/she:

- a. Start doing immediately?
- b. Stop?
- c. Continue?

12. What else should I be asking you?

13. Do you have any questions?

Thank you.

## **Stakeholder Interviews Summary Template**

The following report summarizes the themes discovered while talking with your colleagues, direct reports, and superiors. Some anonymous quotes are included to give you greater insight about how others perceive you. Review this before your next meeting with your coach.

<b>Organizational desired outcomes:</b>	To be completed by coach
<b>Personal desired outcomes:</b>	To be completed by coach

<b>Strengths to capitalize on:</b>	<b>Anonymous quotation(s)</b>
1. Impressive knowledge in the _____ field	<ul style="list-style-type: none"> <li>• He's brought tremendous knowledge of many years in _____; he has a great understanding of _____ design.</li> <li>• His knowledge and background coming from _____ and his masters in _____ has been a great contribution to the organization.</li> <li>• His technical knowledge in the area of _____ is far more than anyone else in the organization.</li> <li>• _____ taught us how a _____ organization is very different than an organization that values _____.</li> <li>• He has totally changed the organization around from what it was in the past and brought a lot of value; he raised the bar, and everyone realizes that a lot of this has come from _____.</li> </ul>
2. Excellent strategic thinker	<ul style="list-style-type: none"> <li>• He knows exactly where we need to go and what the steps are to get there.</li> <li>• _____ brought in vision and positioned the group as integral to the company.</li> <li>• He showed us _____ has sustainable long-term value and is an investment that works.</li> <li>• _____ does the strategic thinking for setting the direction for our organization very well.</li> <li>• He did a wonderful job with our strategic planning session last fall which was an example of excellent leadership.</li> <li>• Employees respect his vision and strategy.</li> </ul>

Strengths to capitalize on:	Anonymous quotation(s)
3. Structured and results-oriented	<ul style="list-style-type: none"> <li>_____ has a lot of energy, knowledge, experience, and is results-oriented.</li> <li>He is savvy on project management; he uses standard templates, organized roles, timelines, etc.</li> </ul>

Opportunities for improvement:	Anonymous quotation(s)
1. Soften communication style and approach	<ul style="list-style-type: none"> <li>_____ can improve communication style, by carefully choosing the right words.</li> <li>He challenges his direct reports in a negative way; they get mad, argue, or just shut down.</li> <li>He's got to learn to deal with people better—he is making a valiant effort.</li> <li>Dealing with people, he would become confrontational; he wouldn't accept other people's thinking.</li> <li>He has improved, but he did not communicate well; he was abrupt.</li> <li>_____ has offended people by what he says and his actions.</li> <li>He presents himself as being above everyone else, except a few peers and his boss.</li> <li>At times, he gets excited about little things; can be abrasive.</li> <li>_____ has made inappropriate comments jokingly and from a leadership perspective.</li> </ul>
2. Listen to understand: focusing on being more open to others' ideas and opinions	<ul style="list-style-type: none"> <li>He is not an active listener.</li> <li>With respect to his directs, if he doesn't like what he hears, he doesn't accept it.</li> <li>If you have another opinion, he doesn't listen to you.</li> <li>_____ needs to listen to people around him and incorporate their thoughts and ideas.</li> <li>He could be more effective if he took thoughts and ideas and let everyone discuss them.</li> <li>Be more open minded to suggestions from his senior leadership team and their reports.</li> <li>He cuts people off with their suggestions.</li> </ul>
3. Create a collaborative work environment, building trust with the teams	<ul style="list-style-type: none"> <li>He decides and tries to sell it with soft arm-twisting.</li> <li>This year, he involved his group in the goal setting process; everyone seemed to have input, and this was seen as an example of great leadership.</li> <li>He is disconnected from his group; if he builds relationships with people as individuals it will be better.</li> <li>He tends to praise one group and not another and people perceive him as playing favorites.</li> <li>Some distrust of _____; he has gone around his directs and created conflicting priorities and direction at times.</li> </ul>

Opportunities for improvement:	Anonymous quotation(s)
	<ul style="list-style-type: none"> <li>• Give people constructive feedback directly instead of talking to others about it to build trust within the teams.</li> <li>• Build trust—make sure people see that he cares for people, that he is a compassionate leader.</li> </ul>
4. Recognize team strengths, delegate authority, and allow the team to perform	<ul style="list-style-type: none"> <li>• He delegates but keeps control to see what gets done his way.</li> <li>• _____ needs to give more freedom to his staff on doing what they know how to do; he tends to get involved in things that are not his responsibility.</li> <li>• Everything is his way.</li> <li>• He can be very dictatorial, controlling.</li> <li>• He makes decisions and communicates with Senior Management without talking with his directs on the impact of those decisions to their work.</li> <li>• _____ takes authority to make changes and approve things I might have already said no to.</li> <li>• He was micromanaging, and he seems to have improved.</li> </ul>

Expectations	Anonymous quotation(s)
1. Lead the organization to meet business objectives, successfully developing the workforce of _____	<ul style="list-style-type: none"> <li>• Lead the _____ team to meet the learning objectives of the corporation.</li> <li>• Further develop the number one _____ organization for the company.</li> <li>• Grow the business and continue to transform and revitalize the organization.</li> <li>• Drive the agenda to create an educated learning organization where all _____ employees are educated on business and customers.</li> </ul>
2. Ensure organizational alignment	<ul style="list-style-type: none"> <li>• Make sure all the different departments and elements are working together.</li> <li>• Make sure everyone is aligned with everything we are doing.</li> </ul>
3. Provide strategic direction	<ul style="list-style-type: none"> <li>• Be a strategic thinker, planner, and organizer.</li> <li>• Be more of a strategic thinker and not as much of the day-to-day actual doer.</li> <li>• Communicate the vision and strategy with other parts of _____.</li> <li>• Set the vision, mission, and direction of the organization.</li> </ul>

Recommendations	Anonymous quotation(s)
1. Start listening	<ul style="list-style-type: none"> <li>• Stop and show genuine interest.</li> <li>• Listen to the people and stop cutting people off and discounting what they say.</li> <li>• Be more open minded to listen to everyone.</li> <li>• Listen to people—you don't have to agree—but be more empathetic and try to understand where people are coming from.</li> </ul>
2. Stop micromanaging	<ul style="list-style-type: none"> <li>• Avoid micromanaging.</li> <li>• Let his direct reports manage.</li> <li>• Trust his direct staff and let them do their jobs.</li> <li>• Don't go directly to the team's reports and create friction.</li> <li>• Stop being as dictatorial and demanding.</li> </ul>
3. Continue being a strategic leader	<ul style="list-style-type: none"> <li>• Set strategic thinking, planning, goals, and objectives.</li> <li>• Continue being a strategic thinker and leader; do the strategic and let your team do the tactical.</li> <li>• Create a learning organization.</li> </ul>

For more information, please contact:

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