



# ACTION PLAN

*Jodie Merow*

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West Chester University: Executive Coaching

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## Overview

This action plan is designed for Jodie Merow, Director of Christ Memorial Lutheran Preschool, based on the 360° feedback summary in which the following ten respondents were selected: (1) Supervisor, (3) Peer, (3) Direct Report, and (3) Other. Overall, the current 360° feedback scores were very high, with no overall score (all raters included) falling below a four out of five, and an overall score (summary of all items across all raters) of 4.62 on a 5-point scale.

*“Jodie is a natural leader. She leads by example, always giving her best effort. She creates a work environment where everyone feels appreciated, valuable, safe and loved.”*

Your raters described you as “*positive, empathetic, dedicated, inspiring, trustworthy, caring, efficient and also a great listener and communicator*”. You received almost perfect ratings on every item, which is rare- you should be proud of yourself! Your relationships with the people you work with are genuine and filled with gratitude- You have done a phenomenal job as a leader.

However, you have just entered a new role - being a grandmother to Faye!

It is time to start thinking about succession planning and making some changes to your life and career. We know that you care so deeply about your workplace and want to ensure everything will be handled with care as you step away from the position. We hope we help you make this process easier for everyone.

The following action plan will outline your leadership strengths, developmental opportunities, and a timeline to guide us through the coaching sessions with plans for the future.

## **Primary Leadership Strengths**

*These are your defining strengths – areas where you stand out as exceptional and where there is strong consensus among raters.*

### **Emotional Intelligence (EQ)**

You received perfect marks for qualities associated with emotional intelligence. Your dependable behavior is admired and counted on by others. Your readers commented that you make “*every person on the staff feel valued and appreciated every day.*” Your raters know that you make a positive first impression. You overcome setbacks quickly and in an expert fashion. You express your emotions in a mature and dignified manner. You can communicate with others transparently, credibly, and compellingly.

### **Transformational Leadership**

Again, you have received 5.0 on measures associated with transformational leadership. Congratulations, your raters know you stand up for what you believe in. You follow through on promises or commitments you arrange. You can express your honest opinions with others without seeming distant, as evidenced by one comment stating that you are “*approachable with any concerns or questions.*” You do not compromise or deviate from your ethical standards, even under pressure, all while avoiding excessive self-promotion. The following comment from your readers should highlight the notion of your solid ethical standards: “*In a challenging setting, she makes sure that her staff have what they need to succeed while empowering others to make their own way.*”

## **Developmental Opportunities**

*These are areas you are encouraged to improve. They will require more significant adjustment to your current working style for noticeable change.*

### **Strategic Vision and Planning**

You received a score of 4.68 on this section. Strategic vision and planning falls under the “Micro to Macro vision” category. It is a process in which a leader defines their vision for the future and identifies their organization’s goals and objectives. It includes establishing short-term and long-term goals for the organization, teams, and leaders themselves. Questions such as “like to focus on the future and how things ‘could be’” (scored 4.20) and “proactively identifies the major issues affecting our business and create plans to address them” (scored 4.50) target the strategic vision aspect. Questions such as “likes to plan his/her work in advance - estimating the time, steps, personnel and resource needs required project (scored 4.50)” targeted the planning aspect. Overall, the scores were pretty high so you will just need to put a little effort in to get better at this.

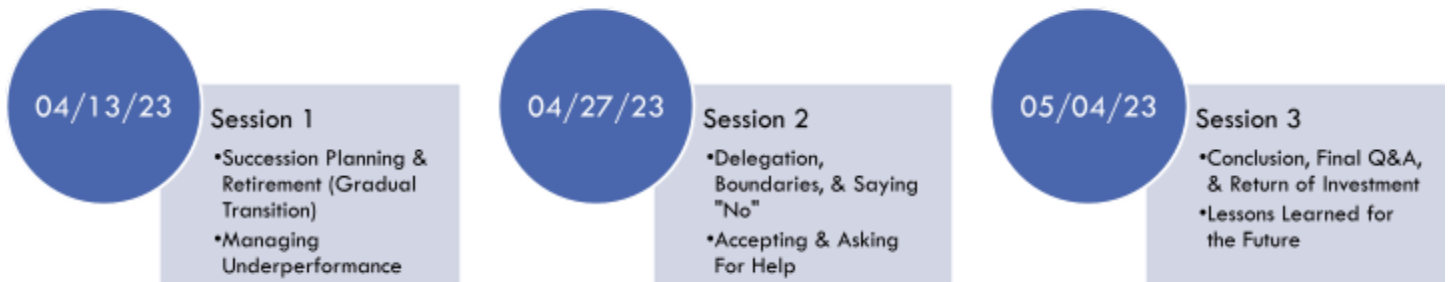
### **Self-Confidence & Openness**

This category refers to you feeling confident in training other staff members and disciplining an employee when needed. You received a score of 4.42 in this category. Believing in your leadership and being confident will allow your team members to lean on you more and for you to lean on them and delegate tasks to them instead of doing everything yourself. Questions like “manages underperformance appropriately” (scored 4.20) and “values continuous training and development for his/ herself and others” (scored 4.50) targeted these topics. Lastly, according to the open-ended comments from your direct reports, *“Jodie could possibly benefit from a little more delegation of duties to lighten her load a little bit if she would feel comfortable asking for help from others when necessary.”*

### **Leadership Agility**

You received a score of 4.61 for this category. Leadership agility refers to the ability to effectively lead organizational change, building teams, and navigating challenging business conversations. This means that you need to become more self-aware and actively balanced in real time when navigating through the workday. By working on your flexibility and using your strengths (mentioned above) to their full potential you will be able to improve leadership agility. Questions like “challenges the system when change is needed” (scored 4.40) and “likes to stay current on new trends in his/her line of business (scored 4.40)” targeted this category.

## ACTION PLAN STEPS



The graphic below displays some of the important documents we've gone over in our time together. To keep everything in one place and organized for you, we created a folder for you to access all of the deliverables here: [Resources for Jodie](#)

“Homework” may be assigned from the following resources (click the white circles to be directed with a link to these sources in a folder we created for you):



## 1. Succession Planning

Arranging, designing, and proceeding with succession planning is daunting, to say the least. Just look at what Deloitte experts say, "While 86 percent of leaders believe leadership succession planning is an 'urgent' or 'important' priority, only 14 percent believe they do it well". That is not to say you are alone or without support or assistance. Our team will introduce you to various concepts, provide some homework activities and provide valuable sources of information that will be useful for you to achieve success. Our team will open the door to planning your future short-term goals and building upon your foundation for long-term success.

**Help Others See the Future** – Others may not find it easy to envision how things will look 5 or 10 years from now. They may get apprehensive if the vision seems too distant for them to imagine or feels too uncertain. Please provide as much detail as possible about how they can help build a positive future state. Make sure your vision is grounded in reality; this will build trust and confidence in your ideas.

**Set Aside Time** – You must schedule at least 30 minutes each week for strategic thinking and problem-solving. Allocate the time needed for planning, organizing, and reviewing ongoing projects and operations. Review and prioritize your "to-do list" at least twice, at the beginning and end of each day. Think through your priorities and focus on the next steps that must be taken to address the current issues.

**Plan Ahead** – Each month, identify possible changes ahead on your horizon. Write down how you will prepare, what actions you need to take, and list the benefits of the change. Understand that security doesn't come from maintaining the status quo and doing things the way they have always been done; security is about ensuring you are well-prepared for the future.

### Evaluate the Impact:

1. Before implementing an action, think about all the possible consequences.
2. Evaluate the impact your planning may have on other units and departments, and then discuss your plans with those affected.
3. Don't remain committed to a poor decision or strategy as you gather new information.

### Communicate a Vision for the Future:

1. Have a passion for your business.
2. Be proud of your company and the service it provides.
3. Communicate a transparent scenario of the organization's future potential.
4. Describe a vision of the future to your group at least once a year.
5. Talk about what is possible. Your optimism will help others look to the future with anticipation.

### Reduce perfectionism:

1. Ensure to be "effective" or "good" rather than "perfect."
2. Remember to accept that some things may never be perfect in your eyes; relax and don't demand so much of yourself. That is to say; you don't have to be everything to everyone.



3. Understand that the fear of failure may limit you from trying new opportunities. Concentrate on the value you bring rather than your performance (measured as success/failure)

**Getting Started:** Session #1 of our coaching with you will be vital as it will set the stage for your long-term goal of ensuring you leave your organization with trusted and, more importantly, capable hands. Our team will create a workshop during this session for you to engage and understand concepts critical to succession planning.

**READ:** [Identify and Nurture Your Top Talent](#)

## 2. Managing Underperformance

**Manage Resistance** - Treat resistance to change as a problem to solve, not as resistance toward you personally. Explain the change to others: why it is needed, what it will involve, and how it will affect people. Hold "feedback meetings" to allow your colleagues to express their feelings about how a change is progressing.

**Explain Your Decisions** – Explain the “why” behind your thought process, include alternatives, and discuss why a particular choice makes the most sense. Acknowledge how the decision will affect others and give them an opportunity to ask questions.

**Have Difficult Conversations** – Accept that tough conversations are inevitable. Always address a conflict directly with the individual involved as soon as possible. Instead of avoiding a tough conversation, see it as an opportunity to strengthen your leadership as you deal constructively with the issue and move the relationship forward.

**Stay Humble** – Avoid acting arrogant or “talking down” to others. Acknowledge what you do not know or when others may know more than you. Let your contributions speak for themselves; don’t excessively promote your own achievements. Speak up selectively; don’t talk just to be heard.

Here are some ways to address underperformance in your role with your direct reports, peers, superiors, and with the parents.

### **DO:**

- **RECOGNIZE THAT THERE IS A PROBLEM**
- **CONDUCT IN-PERSON ONE-ON-ONE MEETINGS WITH INDIVIDUALS UNDERPERFORMING**
- **REITERATE JOB EXPECTATIONS**
- **MANAGE EMPLOYEE EXPECTATIONS**
- **DEVELOP AN ACTION PLAN FOR UNDERPERFORMING EMPLOYEES**
- **CONDUCT REGULAR CHECK-INS AND FOLLOW-UP**
- **RECOGNIZE PROGRESS AND PRACTICE PERFORMANCE COACHING**
- **PROVIDE REGULAR FEEDBACK**
- **MAKE A DECISION IF PERFORMANCE DOESN'T IMPROVE**

### **DON'T:**



- EXHIBIT ANY NEGATIVE BEHAVIOR OR TONE
- LET IT GET OUT OF HAND
- BLAME THE EMPLOYEE FOR ANY REASON
- GO OFF TOPIC. HAVE A LIST OF ITEMS RELATED TO THE UNDERPERFORMANCE AND STAY ON TRACK

### 3. Delegation, Boundaries & Saying “No”

READ: [How to Delegate with Clarity and Confidence](#)

Boundaries are something we all struggle with. We like to feel like we can take everything on; and we feel accomplished when we are able to get it all finished - and our society makes us feel worthless if we aren't productive. When asked about what is holding you back, a peer stated that it is “sometimes hard to delegate full responsibility” but others support that “Jodie is humble enough to always be looking for ways to grow” and we agree.

Practice saying unapologetically, *“I’d love to help you out, but I’m already swamped.”* Avoid the tendency to take it over because it will be faster if you do it yourself. Don’t solve the problem for them. Instead, suggest they ask a coworker for assistance.

**Let Them Learn** – Delegate tasks even when the other person may not do it as well as you. Think of it as a learning opportunity for the other person where tolerance for mistakes is higher. Try to delegate the whole task, rather than only part of a project. Be clear and specific on objectives and timeframes. Do not go into detail on how to meet the objectives; just focus on the results you want. Check in periodically and give plenty of positive feedback. Ensure that the person has the necessary authority and resources to complete the task. Encourage them to decide some issues on a preliminary basis, even if responsibility for the final decision rests with you. Debrief the task at its completion to promote learning.

**Get Out of the Weeds** – When you continue to do work that someone else could do, you are not doing something more important or strategic. Be selective about when and how you engage hands-on, so that you can focus on the highest value work. Get some of the work off your plate so you can address the bigger picture. Don’t get “bogged down” with day-to-day responsibilities that limit your ability to think strategically. Make sure you have the necessary qualified talent in place to reduce your own involvement in project work. Move towards a climate where you are in command, but not in control, of every issue.

**Delegate and Trust** – Do you trust your staff to take over more responsibilities? Delegate work that is not the best use of your time. Reduce your own attachment to a project. Relinquish control. Let others take the lead. Identify which of your own job duties you can hand over to your associates. Then determine to whom those duties can best be delegated, based on your knowledge of their strengths and weaknesses. Be prepared to adapt to other’s work styles, as people tackle tasks in their own ways. Try to curb impatience when others take different approaches or take longer to do work at which you are already proficient.

**Listen Objectively** – Encourage the open expression of ideas. Recognize the importance of others having their own opinions. Be empathetic to viewpoints that are different than yours, and work hard to understand each person's perspective. Show appreciation for all input even if some ideas will not be used or implemented.

## 4. Asking For & Accepting Help

READ: [How to Politely and Confidently Say No to More Work](#)

**Be Honest When You Don't Know** – Being vulnerable and open about your own learning makes you human. Admit that there are still some areas where you need to learn and grow. Respect knowledge that is superior to your own; defer to others that have more expertise. Needing to be the expert on every topic is unrealistic and unproductive.

**Enlarge Your Vision** – Ask others to play devil's advocate for you so that you can look at all possibilities from different perspectives, strengthen your decision-making skills, and enlarge your understanding of various issues. Seek differing perspectives (from at least 3 people) when solving complex problems.

**Negotiate Deadlines** – If you're understaffed, ask for help or negotiate reasonable deadlines. You're less likely to be working at midnight the night before a project is due if you set appropriate expectations up front.

- Know your limits and be willing to speak up about those
- Practice saying “no” in low-risk situations and see what happens
- Rearrange your schedule to meet the needs of both work and family
- Protect your personal time without apology
- Ensure that personal time stays personal – turn off computer, cell phone, etc., to protect personal time from work intrusions
- Top women leaders have a “black-out” period (after school, through dinner, etc.) and then they re-engage with work when needed
- Take care of yourself or you will risk burnout and potentially resent others
- Exercise, spa treatments, quiet time – whatever works best for you

**Homework Assignment** - Identify 5 people in your workplace (teachers, parents, schoolboard, etc.) that could potentially “take something off your list” and ask them for help, even if you feel you do not need it.

Additionally, take record of three scenarios where you were offered help and note why or why not you accepted the help and the reasoning behind your decision. Challenge yourself to let one person help you with something this week.