



CASCADE COACHING

Coaching is a mutual learning partnership designed to help individuals unfold their innate capabilities and creativity to address concerns and aspirations that are important to them.

The foundation of the Cascade coaching approach is:

- **Trust:** creation of a confidential, effective, respectful relationship
- **Goals:** clarity and full focus on fulfilling well defined goals
- **Learning:** as both the process and key outcome of the coaching
- **Accountability:** to translate learning into aspired outcomes

We use four integrative leadership dimensions as a frame to create sustainable mindset and behavioral shifts for effectiveness that lasts beyond the coaching work.

- **Expanded mindsets** for greater self-awareness, adaptability and self-management
- **Increased emotional intelligence** and engagement skills to build more effective relationships
- **Development of structures and habits** to anchor and support behavioral change over time
- **Enhanced execution skills** to achieve goals and drive business results

The day to day experience and concerns of our clients provides the forum for learning. The starting point is to identify and clarify the gap between clients' current reality and aspirations or full potential. This is the "creative tension" that provides the energy for the coaching. Progress comes from developing insights that are translated into new approaches and behaviors. Often this requires identifying and dissolving habitual, obsolete patterns of thought and engagement that are no longer useful. Reflective learning of the impact of shifting from old to new mindsets and behaviors is a skill we support clients to develop to accelerate learning. We design custom coaching programs that combine confidential in person or telephone conversations supported by one or more of the following:

- Qualitative feedback from interviews with seniors, peers and other stakeholders
- Feedback from a 360 leader assessment tool such as The Leadership Circle™
- Information from personality/preferences/styles assessment tools including Hogan Assessments, Keirsey Temperament Sorter, HBDI, or Core Values Index
- Writing of a Coaching Action Plan that identifies specific learning goals and anchors insights from qualitative and assessment tool feedback
- Experiential learning events and practices

Our *standard* Coaching Program includes 360 assessment feedback through The Leadership Circle™, the writing of a coaching action plan and up to 6 months of coaching. Our clients find that this program enables them to improve their awareness, engagement and execution and leads to improved results in their relationships and accomplishments.



CASCADE COACHING PROCESS

The process for the frequency, venue, and format for developmental coaching is detailed below.

Typically, two one-hour sessions are held twice a month for up to six months. This is considered “best practice” for developmental coaching of leaders. Coaching sessions can be a combination of “in person” and “over the telephone” for efficiency and cost-savings reasons. This design assumes two in-person, if location permits, and eight telephonic coaching sessions, including two meetings with the individual’s manager (*up to 10 hours total*). Creation of a Coaching Action Plan provides a roadmap for coaching by including the goals, action steps and target dates that the individual needs to take in order to develop as a leader.

All coaching sessions are focused on feedback from a 360° assessment, specified organizational leadership competencies, and the Coaching Action Plan (CAP) crafted from the results of this assessment. In the CAP, the individual identifies one to three goals which are reasonably achievable in a six month period. More than three goals can cause loss of focus and frustration in lack of completion. Once the CAP is ready, a meeting is held with the individual’s manager (typically the third coaching session) to provide support and buy-in to goals. This also provides increased accountability for the individual. The coach is present at these meeting to support the individual, hear the comments from the manager, observe the employee-manager interaction, and encourage the manager to keep the CAP alive with the individual throughout the coaching process. Coaching sessions are progressive and focused on the participant’s agenda and goals, providing participant ownership for the process. The CAP is also used to evaluate progress at the end, in a discussion between the individual, manager and coach at the completion of the coaching engagement, to determine whether the goals were met and what additional development needs to occur. Coaching concludes with a development plan to carry the learnings forward and to formalize a plan for “what’s next” in the growth of the individual.

Key Steps in Process:

Coaching Month	Coaching Hours, Format & Topics	Coaching Session Hours
1	Session 1 (ideally in person): Debrief 360° assessment, goal setting and action planning	1.0
	Session 2 (telephone): Finalize development plan, meet with manager to gain support for action plan	1.0
2	Session 3 (telephone): Coaching on goals and action plans	1.0
	Session 4 (telephone): Coaching on goals and action plans	1.0
3	Session 5 (telephone): Coaching on goals and action plans	1.0
	Session 6 (telephone): Coaching on goals and action plans	1.0
4	Session 7 (telephone): Coaching on goals and action plans	1.0
	Session 8 (telephone): Coaching on goals and action plans	1.0
5	Session 9 (telephone): Coaching on goals and action plans	1.0
	Session 10 (in person): Review post-coaching development plan, meet with manager to gain support for post-coaching development	1.0
TOTAL COACHING HOURS		10.0



Shannon Wallis

Shannon Wallis is a results-driven leader, passionate about accelerating the growth and taking the performance of executives and managers to new heights. She delivers real impact – bringing nearly 20 years of experience in transformational change, leadership program design, executive coaching, and strategic planning. Prior to founding Cascade Leadership, Shannon was Microsoft's Global Director of High Potential Leadership Development in which she was responsible for the development of top-tier talent and the chief architect of an award winning leadership program recognized by Fortune, Leadership Excellence, Best Practice Institute, and Workforce Magazine. In addition, she has consulted to and held leadership positions in Fortune 100 businesses as diverse as Coca-Cola, Price Waterhouse, Federal Express and

Grameen Foundation.

Shannon knows that to achieve long-term sustainability in an environment that is increasingly complex, ambiguous, and volatile, leaders must discover new destinations for their organizations. More importantly, they must chart and illuminate the path to the reach the destination and imbed the knowledge and capability in those who follow them to reach it as well. Shannon works with leaders and their teams to envision unexplored destinations and navigate the paths they must take to reach them, leveraging her experience as both an internal executive and external consultant. As the "guide on the side," she walks the path with her clients leaving behind leaders who are more authentic, innovative and capable of leading through today's challenges.

Shannon partners with clients in three ways:

- Enabling leaders to achieve great business outcomes from their teams and organizations.
- Designing and delivering high impact leadership development experiences.
- Accelerating success by coaching clients to uncover deep awareness and create results that matter most.

In addition, Shannon is a contributor to five books on leadership and talent management which can be found at her website www.cascadeleadership.solutions. She serves on the board of United Planet whose mission is to create a world in which all people understand, respect, and support one another.

Clients

The Coca-Cola Company, EMC, Federal Express, Microsoft Corporation, Panalpina, The Siegfried Group, LLP., VMware, Cendant, Lakes Region General Hospital, Cool Kids Learn, Nuestro Pequeños Hermanos, Grameen Foundation, EnseñaPeru, Kibo Foundation, United Planet and El Monte High School.

Education/Trainings/Certifications

Shannon holds an MBA with concentration in Health Services Management from Duke University and a BS in Human Development and Social Policy from Northwestern University. She is professionally trained and certified in a variety of psychometric and 360 feedback instruments, including Hogan Assessments, The Leadership Circle 360, Core Values Index, Keirsey Temperament Sorter, and Herrmann Brain Dominance Instrument, as well as both the World Institute of Action Learning and Authenticity Consulting coaching methodologies and is a member of the National Speakers Association.