

StakeHolder Instant Feedback Tool - SHIFT



A Case Study for Coaches

by Dr. Kevin Gazzara and Scott Masciarelli, PCC, BCC

SHIFT - A Case Study for Coaches

Welcome to the StakeHolder Instant Feedback Tool (SHIFT) Webinar



Brought to you by: **MAGNA**
Leadership Solutions LLC

Dr. Kevin Gazzara
Kevin@MagnaLeadership.com
Office 623-252-2389

SHIFT (StakeHolder Instant Feedback Tool) for Coaches – Case Study

You can view this full webinar at
https://magnaleader.co/Shift_Case_Study.

Introduction

Hi, here is the transcript of the Stakeholder Instant Feedback Tool webinar. You can watch the webinar here. We believe that SHIFT is an exciting tool that will make a huge difference in your business.



Who is SHIFT For?

Who Is SHIFT For? SHIFT is a revolutionary feedback-focused tool designed for coaches. It is created to help them get tangible and quantifiable feedback from their clients, fellow coaches, or managers. Everything you need to know about this great tool is contained in the slides sections below.

Why you Should Read this Case Study or Listen to the Webinar

Why should you read this case study or watch the webinar? The reason you should read this report is contained in the Coaching Story section. The big thing for us is that we want you to be successful. Our feedback tool will help your business grow. It will also help you to retain your current clients and attract new ones.

The 5 Topics

Today we have five topics that we're going to cover.

1. Introducing SHIFT
2. Sharing our coaching story and SHIFT demo
3. Testimonial from a coach using SHIFT for the past one year.
4. Sharing SHIFT success stories.
5. The Big question and how SHIFT can help to accelerate your coaching business.

SHIFT - A Case Study for Coaches

Background

My name is Dr Kevin Gazzara. I am the founder of Magna Leadership Solutions. We are a management and leadership consulting firm based in Phoenix, Arizona. We deliver acclaimed leadership academy. We provide training and development, executive coaching, facilitation, keynote speaking, and a whole suite of assessment tools including SHIFT. We're happy Scott is with us. He will be sharing his many years of experience using SHIFT.

I am Scott Masciarelli, PCC, BCC, a certified coach with the International Coaching Federation (ICF). I coach corporate executives. I help leaders to embrace their authenticity and lead from the heart, allowing them to improve their leadership performances and effectiveness with ease. During the process, they improve their team member connections by opening conversations which facilitate learning and development, improves results and their own leadership satisfaction level.

How SHIFT Evolved



Over the years, we discovered that many executives are overstressed with their own jobs or stressed out by their underperforming employees. Despite executive training and coaching like Magna Leadership Solutions, executive retention, job satisfaction and productivity continue to decline in the workplace. Therefore, an early alert system, that provides feedback to the managers and the executives can help them reverse the disturbing trends. The SHIFT tool is the early alert system, that gives executives, managers and coaches the necessary feedback to make the desired difference.



Here's the Big Question

Do you focus on acquiring new employees or retaining current ones? Our experiences show that if you invest in your employees, retaining them is paramount. Employee retention is not just about monetary incentives. You need to develop them, make them see reasons to assume their positions in the firm and provide them with feedback that allows them to grow and become valuable members of your team. No one could say it better than Simon Sinek in his book, "Start with Why." Our research has shown that employees lack the essential communication needed to believe they are valuable parts of the system. Just before or after employees leave a company, they involuntarily or voluntarily reveal that one of the reasons for their leaving is the poor level of communication from their superiors or coworkers. Scott shares his thoughts on employee retention or acquisition in the next section.



SHIFT - A Case Study for Coaches

Acquisition or Retention of Employees

From my coaching experience, acquisition or retention of employees is time-consuming and impacts company productivity. One of my clients is in a situation where his firm has some key open positions and some other positions that are historically difficult to fill. My conversations with him revealed the major drivers of employee turnover or why employees become ineffective in their positions. Over time, the client is beginning to recognize how earlier coaching could have helped retain his employees. The benefits of earlier coaching are far-reaching. It reduces attrition and helps to remove the dangers of unfilled positions. Thus, early coaching makes the leader's work easier and promotes a win-win scenario for both the leader and the company.

What about the cost of pressure and stress such absenteeism causes team members? You will agree with us that quantifying the full degree of employee turnover impact is almost impossible.



https://magnaleader.co/SHIFT_Coaching

SHIFT Provides Tangible Results

We hope that SHIFT will help you to retain your employees and shield your firm from the cost implications of employee turnover. Peter Drucker is one of my favorite authors and theorists. Peter believed that "what gets measured, gets improved". One discovery I made from my many years of coaching is that measuring the performance of a coachee (other than anecdotal and subjective feedback) is extremely difficult. Thus, we realized that having a tool that can quickly measure such performance and provide feedback will transform the corporate industry. Such feedback tool will define a baseline and future road-map. Scott has a wonderful story about his coaching experience using the feedback tool.

The Attrition Calculator

How much does Attrition cost your business? You can find out using our attrition calculator here - https://magnaleader.co/Attrition_Calculator.

It will only take you 30 seconds to calculate how much employee turnover costs your company. Surprisingly enough, it is not uncommon for an entry-level employee to cost a firm between \$10,000 to, \$30,000. For executives, the cost runs into a whopping six-figure digit. Note that beyond the monetary estimation, there are other things that we couldn't quantify. Such things include the impact of the person's absence and how that absence impacts other employees especially subordinates. What about the impacts of tasks that are left undone within the period of absenteeism?



https://magnaleader.co/SHIFT_Coaching

SHIFT - A Case Study for Coaches

An Inside Look at the SHIFT Site

Here is the link for an insider view of what SHIFT is about - https://magnaleader.co/SHIFT_Coaching. You have all the descriptions that make using and navigating SHIFT easy. Here is a link to a 3-minute video to help you set up SHIFT - https://magnaleader.co/Shift_Setup1

How SHIFT is better than other 360 degree-like systems? It is super easy to use thereby making your feedback mechanism quick. The system knows how to automatically send out reminders for additional feedback. The dashboard is personally tailored to suit everyone to protect everyone's privacy and help users grow. The feedback system is designed to send a reminder if you haven't checked your results in a while. You also have your private link (URL in the cloud) to help you track your results at any time.

The Coach's Story

I started using SHIFT with one of my executive clients in February this year. As Kevin pointed out, SHIFT is easy to set up and excellent in protecting clients' confidentiality. It took me just a minute to create an account. Once the account was created, 'Joe' (my client) and I developed the questions together. It became a co-creative experience where we had some prior 360-degree feedback from team members and people in his organization who informed the ideas on topics of his coaching program.

Through the conversation on his previous 360-degree feedback, other insights which we expanded upon emerged to become the foundation for the coaching session. From this awareness, we created eight questions that you can see below. We felt these questions reflected the points he wanted to track feedback on an ongoing basis.

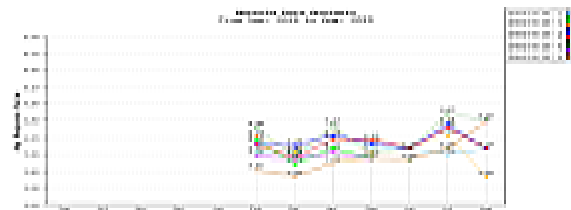
My Coaching Client

Monthly Data Analysis

From Sep. 2018 to Aug. 2019



Q#	Question	Average Rating												Total Responses	Comments Count
		2018	2019	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019		
1	As a leader, I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
2	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
3	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
4	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
5	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
6	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
7	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00
8	I am confident in my decisions.	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	11	0.00



https://magnaleader.co/SHIFT_Coaching

You can see these are simple statements here which then you can grade from one to five. It's 100% confidential and there is an optional place to leave comments. There are a few people that now and then will leave comments which is also very helpful and still remains confidential.

I was particularly impressed because those invited to participate in the use of SHIFT were receptive to the opportunity. Once they understood the confidentiality, and how data would be received, they came on board. They shared organizational vision, wanted to see improvement, and felt respected that their inputs mattered. It is obvious therefore that while SHIFT is designed for leaders or the coaches, the participants, the employees also benefited from the experience.

SHIFT - A Case Study for Coaches

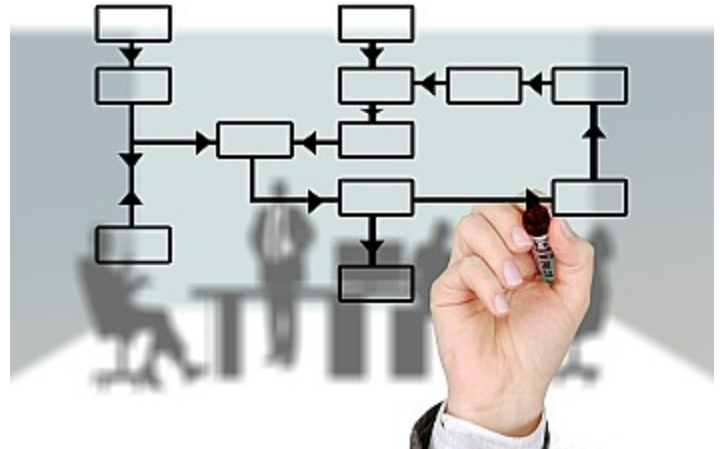


Measurable Results

There are remarkable improvements with Joe's leadership based on the eight people he selected to provide ongoing feedback. In the beginning, we focused on twice-a-month feedback for two months. This period allowed the participants to become familiar with SHIFT and to provide the initial quick feedback. At the end of the first period, we switched to a monthly survey.

Over time we observed dips and spikes at different periods. Such responses provided us with an opportunity to discuss what was happening, why the emerging feedback in comparison with previous feedback. The employee feedback provided the foundation for coaching.

As a coach, even before I met Joe, I particularly love to check data from SHIFT to have an overview of what's happening. What you will not see here is the breakdown on the feedback distributions. And you need to understand that both graph and data view of questions exist. I have the culture of showing both the graph and data views to those I invite to participate. This helps them to understand the vital confidentiality, how to view data as well as how to use them.



The Process

Based on my coaching program, we selected some areas of focus. Note that initial topics were informed by 360-degree feedback which preceded the session that formed the coaching foundation. Our ideal standard was to ensure that the questions were less than 10 but more than 5. The ideal number is between 3 to 7 questions. This helps to get a complete view of an employee's perception of the leader. A pdf manual on SHIFT website provides directions and sample questions to guide you on how to structure your questions.

One remarkable thing about SHIFT is that the clients I have coached using the tool are happy and appreciate the fact that SHIFT enables them to control the feedback questions. Thus, making the feedback mechanism the clients' agenda which is the key aim of coaching. I discuss the entire process with clients but they choose who provides feedback and how the questions would be worded. This deepens their engagement in the process.

SHIFT - A Case Study for Coaches

Flexibility for the Questions

I would also like to add that you can add or delete questions at any point in the feedback process. Note that if you delete questions, it will wipe out all the previously associated data. But you can also keep the data and remove the question just by clicking “disable”. For instance, assuming Joe positively leads by example, as you could see in question number 2, he’s running at 4.5. If you do not wish to track that question for the rest of the year, you can simply disable it. This keeps all the results (data) to the point you disable the question. Any time you get an automated email, it will be indicated that it’s for the period you evaluated Joe and by this time the question you disabled will no longer be visible to participants. This feature puts the coach in control of every process so that your coachees can move to the next important area once they are happy, they have made tremendous progress in an area.



Participants

The need to change or add people who leave feedback is vital since people continue to leave and come into the team due to changes in the organization. The good thing is that changing participants and retaining collected data is easy with SHIFT. Once you remove people from the feedback system because they left the organization after four months of providing SHIFT feedback, the data will remain there for reference. And you can add participants at any point.

Annual Performance Review

My experience with Joe was amazing. I think he could use the SHIFT feedback for his annual performance review. Having such great quantitative data should make a big difference in his performance evaluation. It’s noteworthy that SHIFT has a print function which enables the coachee to print the data and give to the manager at the end of the year.

Personal Connection

In my coaching engagement, I visited many sites around the world and have met a good number of people to provide feedback. They are extremely appreciative of the SHIFT feedback tool because they want things to improve. They appreciate the fact that their input could contribute to decision making and the fact that they could be asked how their leaders or managers are doing is another level of engagement and interaction. Feedback mechanism should be a regular thing. It has a remarkable way of improving communication within the organization and by implication helps to get rid of push-back.



SHIFT - A Case Study for Coaches

Security and Feedback Tracking

The SHIFT system automatically sends reminders to the manager to review and to the participants if they have not filled it out. The system tracks the IP so it knows who to send the reminder to. There's also a safety feature which you may not even be aware of, that if someone, say you have a disgruntled employee that wants to skew the data and go in and fill it out 10 times, the system will recognize the computer's IP address and it will just say, "you've already filled this out, you will be able to fill this out in the something like the next 14 days." The SHIFT system can't identify any particular name, it is 100% anonymous and 100% confidential. But the system does know if there's someone trying to put in multiple surveys to skew the data, and it will just respond with a message that they have already completed the survey and will be eligible to complete the next survey in 14 or more days after their last set of responses.



Customer Engagement and Retention

It's so much easier to secure additional business within an organization once we're working with the organization. While I have not shown my data to the company sponsor, yet, I will be asking the client for permission first. It is a real success story and I believe it deserves to be shared. Also, this process maintains complete confidentiality, so it's a wonderful thing to publicize that somebody is doing well and it's also a great publication Publicity for coaching in general and coaching within the organization which is in this organization is something new. I will say that because of the interaction I've had with the sponsors and with HR, it has led to additional work already, which has been great.

Additional Coaching Engagements

I'm confident that this is another way to secure additional work by showing the data and highlighting successes. While a 360-degree assessment is great, you only get that one-time view. SHIFT is much more dynamic and effective and provides ongoing feedback compared to just a one-time report. We know the probability of say selling services or products to an existing customer is at least 60% to 70% compared to selling to a new customer. Personally, I would rather focus on an organization I have a great working relationship and continue to go deep.

I found using SHIFT with clients beneficial in securing a coaching contract extension of almost nine months. Having real data rather than anecdotal data demonstrates the value I provide as a coach. We also use SHIFT with organizations that are using our Leading Forward Academy to track their performances and to show that the leaders are making great advancement. One of the biggest advantages is that it allows us to have a conversation with the sponsor to make measuring tangible results effective.

Continuing SHIFT

As could be seen from Scott's case study, participants have seen great results on what they are working on. Some clients have achieved their full expected targets and may not need additional coaching consultancy. Yet, they expressed high hopes in the potentials of SHIFT and would like to continue to use the feedback tool. They could extend the SHIFT subscription if they desire regardless of continuation of the coaching contract. As they continue to get feedback, when there is a dip, they might want to hire for a short period or discuss renewing contract with the coach. While you may not get an immediate lump sum for the renewed interest to extend the contract to a couple of months, getting clients to extend SHIFT subscription for more feedback is advantageous. As a coach, you still retain access and could monitor clients' performances and make suggestions periodically.

SHIFT - A Case Study for Coaches



Executive Clients

Something I didn't mention is that my executive and leadership clients love data and to quantify results. Everything they do is focused on data, Key Performance Indicators (KPI's), performances, etc. The difference here is that the data is all about the clients and this is the first time they are exposed to such frequency and depth of information.

Reinforcement Techniques

I regularly take a look at available data a week before my coaching session. This helps me to get an idea on areas to focus in my discussion with clients. What has worked for me in the coaching engagement is the forward-looking approach to issues - I see a week ahead of time. In instances where there is an improvement in the performance, I simply do a screenshot, highlight the point of improvement, and send a copy of the new rating to clients. This simple attitude is encouraging and makes my coaching session easy because we simply look at the score - improved or not - recognize and reinforce where necessary in a positive way. This makes the entire process less daunting for individuals.



Beyond Work Advantage

I would like to add one thing about the data from SHIFT and this is not specific to the work environment. Some of the improvements we recorded with Joe were; listening better, paying attention, and communicating respectfully which really paid off. He mentioned that his family; his spouse and the children have commended that he had begun to listen to them and to pay more attention. Thus, the data is not just about work, but as we all are holistic human beings, everything is connected and the organizational improvements have positive impacts outside of the workplace.

As coaches, it's our job to make the difference. It's not just that we are doing it for money. It's all about making a difference both personally and professionally. People say it made a difference in their homes because their wives and children noticed and commended them. The amazing thing is that we now have a quantitative way to show the difference.

SHIFT - A Case Study for Coaches

How is this Different than a Traditional 360 Degree Feedback?

I spent almost one year at Intel and 30 years in the corporate world, and one of the things with a 360 degree feedback tool is that you know and get the results once every 12 to 18 months. This is limiting because your boss could only say this is what you are good or bad at and emphasize the need to improve weaknesses. SHIFT is designed to provide users with continuous feedback. It is super easy to use. Traditional 360-degree surveys could take close to an hour or more to complete and has many open-ended questions. SHIFT, on the other hand, is designed with a Likert scale presenting you with a check box for a scale of one to five scores. You can comment if you desire, but this is not required.



Accelerating the Feedback Cycle

Marshall Goldsmith in his study some years back looked at 20,000 people and found out that feedback is the one key factor that helps people to get better. The shorter the feedback window the better the improved behavioral change. What struck me was that once-in-a-month feedback aided 4% positive behavioral change. And if you shorten the feedback window to once-a-week, you will record 43% positive improvement in behavior. It's now evident that the key emphasis is on the frequency of feedback than the time spent in getting the feedback. I think that's the problem with the 360-degree once-and-done approach. The massive amount of data matters and typical organization don't invest time to help individuals get the needed resources.

A 360 degree approach is done with the best initial intentions, but there isn't proper integration of the results. Sometimes when firms receive the results, there is no follow-up coaching. This leaves clients blank, guessing, and unaware of what to do next and how to make improvements. SHIFT is entirely different. It's ongoing, dynamic, and interactive.



Participant's Engagement

From the participant's perspective, there was no push-back at all. I think the biggest reason was that from the beginning they were involved in the setting up of the account, creating the questions and deciding who was going to provide the feedback. The client built the foundation for his SHIFT account. He enjoys data and finds them useful. This is the first time he's getting data regularly that is specific to his behavior and the perception his team members have of him. He's been very receptive to the system and the tool.

Participants have often asked me about the feedback frequency. I started with two weeks for the first two months before I switched to a monthly basis. You can collect feedback every two weeks, once in a month, or once a quarter. It's super easy to change the frequency at any time. What we found was that you should run it every two weeks for at least the first six weeks to get people's buy-in into collecting feedback from the individual. After that, switch to once a month. If you find out the once-a-month is not sufficient, switch back to twice a month.

SHIFT - A Case Study for Coaches

Selecting the Exact Data Range

You can also pull up data for the exact period you wish to collect data. Here is the link - https://magnaleader.co/SHIFT_Coaching SHIFT comes with a feature which asks you to specify the exact period you want to collect data on. If you know something specific has what happened during that time, then this is valuable. For instance, there may be a new manager, or a cutback in the workforce or the organization has had a great financial quarter. You can set the range; however, you want to see how those external factors may have influenced the SHIFT scores. Most people either select the button twice a week, once in a month or once in a quarter. You can get a full or multiple year snapshots if you desired. See details here by clicking the "Examples" tab on the upper left-hand side of the screen. https://magnaleader.co/SHIFT_Coaching

Taking Action

SHIFT site is now updated. Head over to the website to create your account and play with it for five days without spending a dime. Use it with your clients. There is no form of commitment. At the end of the five days, you will get a notification asking if wish to continue the use of the feedback tool. You may accept to continue using SHIFT. When you're creating your account use your coaching email. But you need to use your clients' email addresses when creating accounts for them.



https://magnaleader.co/SHIFT_Coaching

Pricing and Value

How do you bill your clients for the use of SHIFT? I do not bill them separately, but rather include it as part of the coaching package. It is inexpensive, especially when compared with my coaching package. The value is that it improves my chances of renewing my coaching contract. We're really tried hard to make it easy for coaches to be comfortable with the setup. Right now (as of 06/2020) you can get two months (60 days) for only \$7.00 using a credit card or PayPal. If you're really confident and you pretty much have to go through the information shared here, you can subscribe for 6 months at \$59.95 or for 12 months at only \$99.95. This is less than 10 bucks a month. This is significantly less expensive compared with three-sixty. You can modify SHIFT settings as much as you like. If you want to get more information or have questions, there's always SHIFT support you can use.

I must confess that using SHIFT has made a huge difference in my coaching career. So far, it's the best feedback tool I use for my clients. It is super easy to set up and to use. Personally, it doesn't require any additional work. I found it extremely useful and as Kevin has pointed out, I use it in my coaching sessions with clients. It gives me a clear overview of what's happening and what to expect. This often prepares for effective engagement with clients. It also helps me in formulating questions for clients especially because we've included the review of the SHIFT data as part of every coaching session. For this reason, SHIFT has provided me with consistency and structure in the coaching process. While coaching could be unstructured, SHIFT helps with structuring coaching sessions with clients and always helps to maintain the client's agenda.



SHIFT - A Case Study for Coaches

Closing

As a coach, I found SHIFT to be one of my best time-saving investments. It keeps me informed about my actual coaching sessions. So if I see a big change in the client's performance, good or bad, I will send a note to the individual to keep aware so that we can accelerate our session and avoid delay. I often send words of encouragement for a positive change and tips for improvement if there is a negative report. Included in the note I usually send are these words: "Do you need to talk ahead of time?" SHIFT as comes with a nice dashboard as a perfect early alert feedback tool.

The first thing I do before starting my coaching sessions is to look at the SHIFT data. I recognize the participants in areas they did well. They most likely would have received the data a week earlier. I do allow them to maintain control over other elements (score dips or spikes) they would like to discuss in the session. As a coach, I don't only focus on the negatives, I also focus on the positive performances. If they're getting really good results and their auto-generated tables and graphs show positive scores, I get them to describe what they are doing differently, so that they can continue in the line of positive behavior. SHIFT is not intended to be used as a hammer. I use it as a kind of a sexton for guidance on where clients are going.

Contact Us to Get Started

We encourage you to check out the SHIFT site: https://magnaleader.co/SHIFT_Coaching. If you have questions please feel free to contact me at any time at: Kevin@magnaleadership.com.

Thanks again to Scott for his time to share how he is using SHIFT to grow his coaching business and his insights on how it can be used for our readers.



Contact:

Dr. Kevin Gazzara

Kevin@MagnaLeadership.com

Office 623-252-2389

SHIFT Site: https://magnaleader.co/SHIFT_Coaching