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## CHAPTER 1 | Origins and Architecture of the Coaching Report for Leaders

The CPI 260® Coaching Report for Leaders was developed to apply the power and effectiveness of the *California Psychological Inventory*™ (CPI™) instrument to the business need of assessing leadership strengths and challenges.

The CPI assessment has been widely used in businesses and organizations since its creation 50 years ago, and consultants and the businesses they serve have found it very helpful. However, its general norm group did not represent a true managerial/executive database. If you were an executive coach who worked for an organization with enough resources, then you had access to a more relevant set of norms, or you could painstakingly put together guesstimates from a variety of research studies. But there was no single set of managerial/executive normative data that was accessible to all who might want it.

Results on the Coaching Report for Leaders needed to be based on a comparison of the manager or leader client with an appropriate norm group. That norm group was found in a Center for Creative Leadership® (CCL®) database containing CPI results for managers and executives who had participated in CCL's Leadership Development program. The CCL sample, one of the largest of its type and generally representative of North American and European managers and executives acknowledged to be important contributors to their respective organizations, would come to serve as the underlying norm group for the Coaching Report for Leaders. This norm group is discussed on pages 6–10.

### SELECTION OF A NARRATIVE FORMAT

One of the objectives in developing the Coaching Report for Leaders was to present information in a narrative format rather than as a psychological profile. The narration interprets and integrates the traditional CPI scales for the purpose of shedding light on the specific managerial qualities and characteristics relevant to the work world; it does not require an understanding of statistics, scale definitions, or norm groups. The narrative approach thus enables the end user to read the report without having his or her results translated by a trained professional. The Coaching Report for Leaders is designed to enhance the ability of an external coach or consultant to add value in the coaching session by providing insightful, in-depth discussion of results rather than explaining statistical concepts.

Clearly, having experience with the CPI instrument and knowing its scales help the coach or trainer derive maximum value from the Coaching Report for Leaders. However, the report is written so that even if the professional has no history with the CPI assessment, he or she can use the report to work successfully with executives.

### CHOICE OF A COACHING VOICE

Another key objective in developing the Coaching Report for Leaders was to facilitate the development

process for managers and executives much as a coach would, by focusing on two key questions: “How do I compare to other managers and leaders?” and “What can and should I change?” This approach drove the content development of the report.

Intrinsic to the report’s developmental approach was the aim of capturing the “coaching voice”—what might be said by an executive coach or trainer in talking through a CPI profile with a leader in a real-life coaching or training situation. The core quality of this voice is a spirit of mutual and nonjudgmental exploration as to what the individual and combined scale scores might reflect. The coaching voice also considers the many possible management implications, in terms of both assets and potential liabilities or concerns. This conversation is mutual in the sense that the coach or trainer may be the expert on the instrument and the scores, but the person is the expert on himself or herself, the job and responsibilities, and the larger organizational culture and climate.

While nonjudgmental and exploratory in manner and spirit, the coaching voice in this report is not neutral. The reason for this is that all CPI scale scores are not equally desirable, nor do all scores and combinations of scores (and hence people) have an equal likelihood of success at the tasks of management and leadership.

The coaching voice represents what is known through research and experience about the relationship between various scores and combinations of scores and probable strengths, developmental needs, and perceptions of managers and executives by others. Often this coaching voice has to speak the hard truth. The intent was that the Coaching Report for Leaders not shy away from the negative reality of managerial/leadership weaknesses and developmental needs when applicable. Ultimately, this is the kinder—albeit not necessarily gentler—way to proceed because only by knowing where the existing and/or potential problems lie can a leader know what he or she might best change to be more successful.

With some general objectives established for the Coaching Report for Leaders, the next step was to decide what leadership characteristics could be analyzed meaningfully in the report.

## CHOOSING LEADERSHIP CHARACTERISTICS

To choose the leadership characteristics, the report development team\* began with an informal review of the classic and current literature. (See the bibliography for some of these sources.) Common themes emerged, which we then reviewed for a “gut check” of coaching and training relevance.

Second, since development was the overriding goal of the report, we refined the list of leadership characteristics by culling those that presumably could not be developed or changed. For example, ambition is one such characteristic.

Third, we eliminated topics for which no combination of CPI scales could reliably generate predictive and descriptive statements. Strategic vision—an overarching quality and the result of the way many attributes work together—is a characteristic that was dropped for this reason.

Fourth, we eliminated some leadership/management topics because they were so complex in makeup, given the interaction between person, role, and organizational context, as to be beyond the scope of the Coaching Report for Leaders. For example, overall leadership style and effectiveness fell into this category.

After making some refinements, we finalized the list of leadership topics for the report (see Table 1).

### Two-Scale Configural Analysis

The team decided to cross-reference two scales to define each leadership characteristic. This concept builds on the interpretive work of Loring McAllister and others. Simply stated, cross-referencing means that two scales are selected that relate to a single leadership concept and one scale modifies or sheds light on some aspect of the other.

With the cross-referencing completed, our task was then to select the one CPI scale that would be used to make statements about the intended leadership characteristic if only one scale were allowed. For example, for the leadership characteristic Interpersonal Skill, we selected the Sociability scale from the CPI 260 assessment as the starting place. For many of the leadership

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\*Sam Manoogian, Robert Devine, and David Donnay developed the report and the “strength,” “developmental need,” and “area to explore” classifications.

characteristics, there were several scales that might have served as reasonable starting places, and the final choice typically depended on the subtle direction implied by the definition of that leadership characteristic. The second column of Table 1 shows the working definitions of the 18 leadership characteristics.

Then we selected a second scale to capture a related dimension of the leadership characteristic. The purpose of the second scale score was to shine a light on different aspects of the central leadership characteristic. In the case of the Interpersonal Skill leadership characteristic, we selected Amicability as the second scale. Looking at the Amicability score is a way to gauge what it feels like to be on the receiving end of a manager's social behavior. Table 2 shows the CPI scales that were chosen for each leadership characteristic. Note that the first scale listed is the first one chosen for that leadership characteristic.

The specific combination of CPI scales defined the nuances of how the leadership characteristic was

interpreted. For the leadership characteristic Use of Power and Authority, for example, we agreed that the CPI scale of Dominance was the single best choice. Self-control was selected as a support scale to define this leadership characteristic in terms of the likelihood of either excessive or abusive use of power and authority or the opposite problem, underutilization of power and authority. Pairing Dominance with a CPI scale other than Self-control would define the leadership characteristic Use of Power and Authority in a different direction. For example, if Dominance were paired with Empathy, it might define the use of power and authority more in terms of the integration of power with sensitivity to the needs and feelings of others. It is not argued that there is only one pairing of the CPI scales that makes sense or is right.

Finding the pairings that we felt best fit the leadership characteristics' definitions took considerable time. Factors that were considered included (1) statistical qualities of the two scales, such as their intercorrelation and the empirical correlates to managerial

**TABLE 2**  
**CPI™ Scales That Make Up the Leadership Characteristics**

Leadership Characteristic	CPI Scales Chosen
Self-awareness	Self-acceptance (Sa), Empathy (Em)
Self-control	Self-control (Sc), Social Conformity (So)
Resilience	Well-being (Wb), Self-acceptance (Sa)
Use of Power and Authority	Dominance (Do), Self-control (Sc)
Comfort with Organizational Structures	Social Conformity (So), Achievement via Conformance (Ac)
Responsibility and Accountability	Responsibility (Re), Leadership (Lp)
Decisiveness	Dominance (Do), Independence (In)
Interpersonal Skill	Sociability (Sy), Amicability (Ami)
Understanding Others	Empathy (Em), Insightfulness (Is)
Capacity for Collaboration	Tolerance (To), Creative Temperament (Ct)
Working With and Through Others	Managerial Potential (Mp), Independence (In)
Creativity	Creative Temperament (Ct), Achievement via Independence (Ai)
Handling Sensitive Problems	Empathy (Em), Dominance (Do)
Action Orientation	Sensitivity (Sn), Flexibility (Fx)
Self-confidence	Leadership (Lp), Independence (In)
Managing Change	Flexibility (Fx), Self-control (Sc)
Influence	Dominance (Do), Sociability (Sy)
Comfort with Visibility	Social Presence (Sp), Capacity for Status (Cs)

behaviors; (2) practical experience; and (3) whether accurate and discriminating statements could be made for all possible results of combining two CPI scale scores. As a result of this admittedly trial-and-error process, some leadership characteristics were dropped and others relabeled.

## CORE PERFORMANCE AREAS

The 18 leadership characteristics were grouped into five core performance areas to help organize and make sense of the results. At the time the Coaching Report for Leaders was constructed, no empirical data were available to determine the best way to group the leadership characteristics. Yet offering a structure for the characteristics seemed preferable, so we considered various subjective ways of doing this. The five performance areas that were chosen are as follows:

1. Self-management
2. Organizational capabilities
3. Team building and teamwork

4. Problem solving
5. Sustaining the vision

The core performance areas are simply a heuristic way to begin to organize the leadership characteristics. They reflect a developmental sequence, with self-management representing the most basic skills and competencies needed by managers and leaders and sustaining the vision representing the highest-order skills and competencies. For the leader or manager trying to determine what to work on first, this provides a set of guidelines. That is, all other things being equal, a leader or manager would start with self-management developmental needs and work his or her way up the hierarchy of core performance areas (see Figure 1).

There are likely many other equally viable ways to consider organizing and conceptualizing the content of the Coaching Report for Leaders. This one is a conceptual construct and not empirical and research driven. We would expect that as empirical data emerge, these labels and sequences may evolve.

