

# Accreditation in the Bates ExPI™: An Executive Presence Assessment



The Bates ExPI™ (Executive Presence Index) is the first research-based, scientifically validated assessment to measure executive presence and leadership influence

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Learn to assess, coach and develop “Executive Presence”,  
a popular topic in executive development.

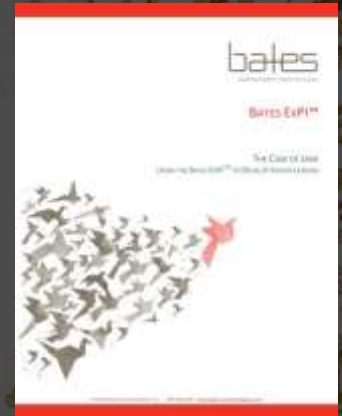
**Unlock the potential for leadership impact in your  
colleagues and clients**

## Don't miss this unique learning opportunity!

## What Clients are Saying:

*“My experience with the ExPI certification program was outstanding. The ExPI assessment is potentially very helpful to all leaders, and the tool is rich and nuanced. To get the most out of it, certification is essential. The Bates team has a thorough and well thought-through approach to skilling up coaches. The program gives you the necessary grounding to really appreciate and help people get full benefit from their ExPI feedback. In addition to the effective teaching component, the program provides opportunity to practice and role-play, which accelerate and deepen understanding of the tool. The certification has proven its value as I’ve started to coach leaders with the help of the ExPI.”*

– Director, Global Talent Management, Global Luxury Retailer



## WHAT YOU NEED TO KNOW:

### What is the Bates ExPI™ (Executive Presence Index)?:

The first research-based, scientifically validated assessment to measure executive presence and leadership influence.



### What is the Bates ExPI™ Accreditation program?

An opportunity for executive coaches and talent development leaders to develop a high degree of competency in administering the Bates ExPI Assessment and applying the Bates Model of Executive Presence to executive development and leadership assessment.

### What will you be able to do, as a result of participating in this program?

Upon completion, you will be able to conduct detailed analysis and interpretation of ExPI assessment data and deliver robust insights to individual leaders and executive teams.

The Bates ExPI™ is a valuable resource to add to the coaching toolbox, addressing a unique need to measure and provide actionable feedback on executive presence. The tool has been proven to complement existing coaching practices and assessment strategies, and reinforces an organization's existing leadership competency model.

### Context:

- This is a small group opportunity to learn how to assess, develop and model executive presence.
- Ei World considers the topic of “Executive Presence” to be a distinctive capability of highly effective leaders. It has been part of almost all development needs in our client coaching engagements in the past year.

## Program Information: ExPI Accreditation (2 days)

### Overview

- A 2-day accreditation program where coaches gain a robust understanding of the Bates Model of Executive Presence and learn how to administer and interpret the Bates ExPI™ multi-rater assessment.
- Pre-seminar, a personal Bates ExPI™ assessment, orientation session (30 minutes), and insights meeting (60 minutes) with a Bates-certified coach.
- Supporting materials including a copy of *All the Leader You Can Be: The Science of Achieving Extraordinary Executive Presence* (Suzanne Bates, McGraw Hill 2016) and the Bates ExPI™ Development Guide.
- Post-session, access to the Bates Community of Practice and online content portal, a one stop resource for tools, videos, and webinars for measuring and assessing executive presence in leaders.

### Learning Objectives

Given the nuances of the Bates ExPI™ model and the way the facets of Executive Presence interrelate to one another, particular attention is given to exploring Bates ExPI™ theory, the model, and its principles of application to a leader’s business context. This process involves:

- Understanding why and how to get business context information to make the feedback specific and relevant for the leader.
- Appreciating the psychological dynamics of giving and receiving feedback, including how to reduce defensiveness in the coachee.
- Learning how to prepare and deliver the Bates two-step process of an Orientation call and an Insights call, which will enhance each participant’s understanding of the Bates ExPI Report and the common patterns and themes in the data.
- Knowing how to help clients leverage their strengths while addressing their developmental themes.
- Mastering the ability to facilitate the Insights call effectively “in the moment,” including dealing with coachees who struggle to understand or accept the results.

### Indicative Program

Arrival Evening	Day 1	Day 2
17:45 arrival for 18:00 prompt start, 21:00 Finish	8:30 arrival for 09:00 prompt start, 18:00 Finish	8:30 arrival for 9:00 prompt start, 17:30 Finish
<ul style="list-style-type: none"> <li>• Welcome</li> <li>• Introductions</li> <li>• Opening Dinner</li> </ul>	<ul style="list-style-type: none"> <li>• Opening/Introductions</li> <li>• Summary of Pre-Program Survey Results</li> <li>• Agenda/Program Goals</li> <li>• Understanding the Bates Executive Presence Model in Detail</li> <li>• Case Studies</li> <li>• Best (and Worst) Feedback Practices</li> <li>• Provider Process Guidance: Orientation Meeting</li> <li>• Partner Work: Conducting the Orientation Meeting</li> <li>• Preparing for the Insights Meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Review of Day One/Preview of Day Two</li> <li>• 1:1 Insights Meeting Partner Work</li> <li>• Debrief of 1:1 Insights Meeting Partner Work</li> <li>• Relationships to Competency Models and Other Assessment Tools</li> <li>• Using the ExPI with Groups and Teams</li> <li>• Building Your Business with the ExPI</li> <li>• “Choose Your Own Adventure”</li> </ul>

	<ul style="list-style-type: none"> <li>• Provider Process Guidance: Insights Meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Graduation for Certified Partners</li> </ul>
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Facilitator/Presenter:

**Scott Weighart, Director of Learning and Development**

Scott Weighart is Director of Learning and Development with Bates Communications, where he creates innovative tools and content to assist the firm’s clients as they work toward mastering powerful communication and leadership skills. He has analyzed the ExPI data and conducted insights meetings with over 200 senior leaders and high potentials, designing and delivering dozens of executive presence programs in open-enrollment sessions as well in private programs. He has led or co-led 13 of the 15 Bates ExPI Certification Programs that have been held to date, and he also runs the Bates ExPI Community of Practice, writing new articles or delivering a webinar each month for certified partners. Additionally, he teaches all new coach/consultants at Bates how to facilitate Bates programs and work with the model of executive presence. Prior to joining Bates in August 2011, Scott spent over two decades in roles within the education and private sectors, helping adult and student learners reach their full professional potential through books, articles, workshops, classes, one-on-one coaching, and integrated learning systems. One constant over the years has been his focus on designing and delivering creative, innovative curricula that make learning engaging and memorable for audiences. He has the author of five books, covering topics ranging from organizational behavior and experiential learning to ice hockey. Earlier in his career, Scott worked as a project manager and medical writer for Total Learning Concepts, which created sales training materials for the pharmaceutical industry. His role was to make sophisticated medical content engaging and understandable for sales professionals. He previously taught classes on organizational behavior at Boston University. As an authority on experiential learning, he has presented at numerous conferences across the US and Canada. At Bates, he has led programs on communicative leadership and executive presence across North America and Europe.



**Bates ExPI™ - Executive Presence Index**

**How does the Bates ExPI™ Assessment work?** The Bates ExPI™ multi-rater assessment tool measures 15 unique facets of a leader’s executive presence. Perceptions of others are compared with the leader’s self-perceptions in order to identify strengths and gaps across all relevant facets of leadership that contribute to one’s presence and impact as a leader.



The Bates ExPI™ Assessment is administered via an online questionnaire. The questionnaire is completed by the individual leader (self-rating), their manager, peers, and direct reports. The Bates ExPI™ contains 90 items and 3 open-ended questions. It provides 15 individual rating scales organized under the three dimensions of executive presence outlined by the Bates Model.

All participants receive professional support to review, interpret, and apply feedback reports. Individualized and group-based approaches to feedback are available based upon the indicated needs of sponsoring companies and individual participants.

## Sample ExPI Assessment Items:

Character:	Substance:	Style:
<p><i>“Shares the life lessons that underlie his/her views and beliefs.”</i></p> <p><i>“Walks the talk on values of honesty, promise-keeping, and fairness.”</i></p> <p><i>“Even when giving hard-hitting feedback, his/her positive intentions are clear.”</i></p>	<p><i>“Able to appraise a complex situation and go directly to the heart of an issue.”</i></p> <p><i>“Knows how to de-escalate emotions and focus discussion.”</i></p> <p><i>“Makes even daunting goals and aspirations seem realistic, exciting, and achievable.”</i></p>	<p><i>“After a discussion with him/her everyone is clear about direction and next steps.”</i></p> <p><i>“Encourages and expects frequent interaction to coordinate action and sustain alignment.”</i></p> <p><i>“Does not shy away from making his/her opinions, views, and reactions known.”</i></p>

## PARTICIPATING

### Prior Experience, Education & Skills



Participation in this program is by invitation only.

To be considered for this accreditation, you will need to:

- Have the appropriate education, certification or experience in a discipline related to human resource development.
- Provide evidence of certification in leadership assessment tools and experience delivering interpretive feedback to leaders.
- Exhibit skill in helping executive clients leverage their strengths while addressing their developmental themes in current business situations.

### Investment in your Professional Development

Included in your investment:

- Meals, including Dinner on the evening of your arrival and following Day 1, and overnight accommodations on 27<sup>th</sup> March and 28<sup>th</sup> March.
- 2-days training from 9am to 6pm on Day 1 and 9am to 5:30pm on Day 2.
- The Book “All the leader you can be” by Suzanne Bates, CEO of Bates Communications.
- Your own ExPI assessment before the event, which will give you an opportunity to compare your self-ratings on the facets and items to how others rate you, including your manager, peers, direct reports, and any other relevant stakeholders.
- A 30-minute, 1:1 orientation meeting conducted by video with a Bates-qualified coach, in which you will answer questions about your business context and receive guidance in understanding your ExPI report and supporting documents.

- A 60-minute, 1:1 insights meeting conducted by video with the same Bates-qualified coach, in which the coach will help you explore your strengths and development themes as they emerge on your ExPI report.
- Refreshments and lunch as a day delegate at Sopwell House Hotel & Conference Centre (close to M25 and M1, north of London, 40 minutes from Heathrow Airport, 25 minutes to Luton Airport).
- Post-session, access to the Bates Community of Practice and online content portal, a one-stop resource for tools, videos, and webinars for measuring and assessing executive presence in leaders.

## PRACTICAL DETAILS and REGISTRATION

### Timings:

6:00pm to 9:00pm on 27<sup>th</sup> March.

9:00am to 6:00pm on both  
28<sup>th</sup> and 29<sup>th</sup> March.

### Venue:

Sopwell House, Cottonmill Lane,  
St Albans, Hertfordshire AL1 2HQ  
<http://sopwellhouse.co.uk>



Deep in the Hertfordshire countryside, with London virtually on the doorstep, Sopwell House is a hidden sanctuary for those who appreciate comfortable refinement and a real sense of freedom.

### To Register your interest by 10<sup>th</sup> February:

Please email Tina Brunner – [tina.brunner@eiworld.org](mailto:tina.brunner@eiworld.org) with your answer to these questions.

1. I am the ideal participant because ... (in max 100 words)
2. My billing address is ...
3. I understand that all places are non-refundable and non-transferable and full payment is required to secure my place and to get started with the ExPI assessment.



### Act now, Don't Delay!

There are very few spaces available on this training; half of the places are already taken. Full payment is required to secure your place once you have been accepted to join this training. All applicants will know by 17<sup>th</sup> February if they have been offered a place. Payment to secure your place is required in full by 24th February. Any places that are not paid for in full will be offered to someone else.

*We want to emphasize that this is a small group training, don't miss out.*



**Please contact Ei World if you have any questions.**

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Ei World improves people performance globally...through the power of Emotional Intelligence and Emotional Resilience. We help world-class organisations build competitive advantage, through focused and timely investment in key individuals and teams using cutting edge approaches. Established 1999. Global provider, experienced in providing coaching and development interventions across 37 countries.