Bates ExPI Certification Pre-Work:
An Overview of the Insights Meeting

By Scott Weighart, Director of Learning and Development

The orientation meeting is straightforward. You've got a script to follow, and after you've done several of them, you'll find that you've internalized the process. Occasionally, you will run into a leader who presents some challenges in that conversation due to their inability to answer the questions efficiently and effectively or, more frequently, because they are unusually distraught or agitated about their data. But generally, the orientation meeting is not too difficult for most experienced coaches to handle.

The insights meeting has a much higher degree of difficulty with the Bates ExPI. Here are some of the reasons why:

- **There is no script—you have more of a loose structure.**

When you get certified or accredited in some assessments, you're given scripts or talking points for various leader types. In contrast, the ExPI is not a typological assessment, so it's not possible to give you several paragraphs that you can read to a leader to help them understand their results. Instead, you're engaged in a 60-minute dialogue in which you and the leader work together to reach insights.

- **The significance of the data will vary depending on the leader's context.**

Remember that the ExPI is an idiographic assessment, not a normative one. We're more interested in what the data mean in the unique context of who the leader is and what he or she needs to drive in terms of results—rather than how the leader's data compare to thousands of other leaders in completely different situations. When leading an ExPI Certification Program, I often will point at two attendees and say this: "Even if the two of you had identical data and comments, we might land on very different results and action steps in our hour together. Because if person A needs to show up as a trusted advisor and strategic partner to her external clients, while person B needs to shepherd internal stakeholders through a time of transformational change, we'll need to look at their data very differently."

- **It takes practice to become skilled at "connecting the dots" for leaders.**

Our certified practitioners report that it's exciting and fun when they start to see how the various facets work together or against each other with various leaders. For example, you might see how a leader's behaviors leading to low ratings in Authenticity could end up explaining lows on items in facets such as Practical Wisdom and Intentionality. Many facets and items on the ExPI are interconnected, but it takes some experience to see the connections and draw a leader's attention to them.

- **You need to manage the clock well to get to actionable feedback within an hour.**

Sometimes we're asked, "Why only an hour to explore such a robust report?" There's no question that you can't review the whole report in an hour. At best, you'll only have time to explore three or four of the lower-rated facets. However, we've found that it's asking a great deal to expect a senior leader to commit more than 60 minutes to the insights conversation on top of the 30-minute orientation call. Perhaps that's just as well, because another factor is that many leaders start to feel "full" cognitively after 60 minutes or so. If you can go a little longer with a given leader, that's fine, but I rarely find that a call continues to be constructive after 75 minutes. Better to arrange a follow-up session to dig deeper if that's a possibility.

As a result, you need to manage the clock to make sure that you leave enough time to discuss the leader's strengths, explore at least three development themes, narrow down to a couple of key themes, and deliver concrete action steps in the last 10 minutes. Knowing when to linger on a facet and when to move forward is definitely a learned skill.

The 10-40-10 Structure of the Insights Conversation

For starters, let's look at this conversation at a high level. We recommend that you follow a 10-40-10 structure: 10 minutes for the opening, 40 minutes for the meaty middle, and 10 minutes to wrap it up:

1. **Beginning (10 minutes)**

- o Take a few moments to check in with the person and build rapport.
- o Briefly remind the leader of the confidentiality of the meeting.
- o Reflect and reframe your understanding of their role and business context.
- o Ask the participant for high-level, general reactions to the report.
- o Acknowledge the general reactions and react to them.

2. **Middle (40 minutes)**

- o After actively acknowledging reactions, turn attention to the Worksheet.
- o Review the strengths that they wrote down on the developmental worksheet, commenting briefly on what each facet really means and how it connects to the leader's business imperatives.
- o Consider reviewing the top five strengths in this way.
- o Pick a facet that you may believe might be an over-strength, but don't identify it as such with the leader. Simply ask the leader to discuss this strength in particular.

- Note and comment on whether their listing of strengths on the worksheet aligns with how others perceive them.
- Make the transition to Key Development Themes.
- Plan to delve into at least three facets among the Development Themes. We'll go into this in greater detail a little later in this article.
- Go to the item-level pages of the report when exploring a specific facet.
- Manage the clock!
- Identify one or two "leading threads."
- Acknowledge and discuss the potential obstacles to development from the Developmental Summary Worksheet.
- If you have not already discussed the questions from the last section, Follow-up with Coach and Raters, address them now.

3. Wrap-up (10 minutes)

- Specify two development themes.
- Offer initial ideas on making the feedback actionable for the key development themes.
- Wrap up by asking the leader to play back what they found to be helpful, powerful, relevant, surprising, and so on during the call.
- Discuss any next steps, including what documents you may share with the leader after the meeting, such as links to relevant articles and our article on how to have follow-up conversations with raters. Caution the leader against following up with raters until they have had time to process today's conversation and read the article.

A More Detailed Description of the Insights Conversation

Now we'll go through the three steps again, only in much greater detail. This step-wise guidance provided below is proven to reliably generate good outcomes. It is with that confidence that we present it as a "best practice" standard for our approach to ExPI feedback.

BEGINNING PHASE (10 Minutes)

1. **Take a few moments to check in with the person and build rapport** if you can, whether through small talk or by mentioning some reason you were looking forward to this meeting.
2. **Briefly remind them of the confidentiality of the meeting**—exactly who, if anyone, will be receiving a summary of the meeting. At Bates, for example, we might mention

that we will share our notes with Bates colleagues but with no one else at the client's company.

3. **Take a few minutes to reflect your understanding of their role and business context**.

   Rather than simply rehashing what you heard during the orientation meeting, consider using this as an opportunity to reframe what you heard and add real insight to it. Here's an example of how this might play out:

   "To get us started, I'd like to play back to you what I heard about your business context on our last call. It's important that we both have this context top of mind as we talk about your data throughout this call. So what I'd like to do is put this context in my own words for you. After I share it with you, I'd like you to tell me whether I've nailed it… or if I've missed something important… or if you simply have a "friendly amendment" that you'd like to add. Okay?"

   "Here we go: What I heard on our last call was the story of an experienced sales leader who represents clients and networks locally, regionally and nationally for your organization. As technology grows and changes, customers expect and demand more. The big theme I heard is that you need to shepherd people through changes--for you, change represents an opportunity, but for others it often feels like a threat. More personally, you've been working on mitigating the impact of your direct style. You mentioned that you hope to 'slow down and work the steps.' So tell me, how does that land for you?"

   The leader may be delighted with your summary but may feel that there's an element that you've overlooked. Once you're in agreement about the context, you could say something like this:

   "Now that we've agreed on the context, let's view it as our 'lighthouse' for the next hour or so. You have a rich set of data in your report, and there may be times when we both may wonder if we need to take action or not on a given theme. If in doubt, we should circle back to our lighthouse to guide us: How is this behavior helping or hindering you as you look to drive those business results or personal goals that you mentioned? Sound good?"

4. **Ask the participant for high-level, general reactions to the report.**

   What I usually ask is something like this: "What I'd like to do now is ask you to give me a 30,000-foot view of your data. I know that you completed your developmental summary worksheet—and thank you for that, as we'll go through that shortly. But at a high level, tell me what some of your most significant takeaways were once you really dug deeply into your data."

5. **Acknowledge the general reactions and react to them**.
   I capture the general reactions, and as I do so I'm reflecting on them. First off, I'm paying attention to the attitude and energy of the leader—whether they seem troubled, curious, bitter, excited, or whatever. In particular, though, I'm noticing whether they seem appropriately balanced or if they are more skewed to the negatives. If the latter happens, I often will respond by saying, "While I was listening to your general reactions, it struck me that you focused only/mostly on the downside that you saw in your data. That's very common: In my experience, about 80% of leaders tend to focus on the portion of the glass that is not full—even when it's a very full glass! So that's a typical reaction, but I want to make sure that we also focus on the many strengths that showed up in your data."

   Conversely, if the leader's general reactions are more balanced, I will react accordingly: "I was pleased to hear the two-handedness of your reaction. Probably 80% of leaders focus on the part of the glass that's not full when I ask that question—even when it's a very full glass. In your case, though, I'm pleased that you're able to bask in the strengths a bit while also picking up on some areas of developmental opportunity. We'll continue to do that throughout this conversation."

MIDDLE PHASE (40 minutes)

Now we're teed up for the meat of the meeting—the middle phase, where we will explore the data in detail. Here are the steps:

1. **After actively acknowledging reactions, turn attention to the Worksheet.**
   The Developmental Summary Worksheet can be viewed as a rough outline of the middle phase of the insights conversation. You certainly aren't limited to what the leader writes on it—frequently, the leader may omit strengths and development themes that are worth discussing—but you always want to acknowledge and discuss what they captured here, particularly on the first two fields.

2. **Review the strengths that they wrote down on the developmental worksheet, commenting briefly on what each facet really means and how it connects to the leader's business imperatives.**
   The quantity and quality of what leaders write on their developmental summary worksheet will vary dramatically. Some leaders will just write down the names of three

facets, period. Others will write down five or more facets and go into significant detail on the impact of each of them.

Either way, you have an opportunity to be additive here. In particular, it can be very helpful if you remind the leader of the working definition of the facet in question, offer a few observations about it, and tether it to that "lighthouse" of the business context.

Here's an example: "Appearance was your highest-rated facet in the eyes of others, and I'm pleased that you wrote it down as a strength! Believe it or not, many leaders don't even write down Appearance on their worksheet, even when it's one of their highest-rated facets. There's a tendency to dismiss this facet as something superficial and unimportant. That would be a mistake. In the model, Appearance is not just executive image; it's also a reflection of your energy and preparation—how much you show up looking "ready for the game." We can think of it as a "tone-setting quality." In your case, we agreed that you need to show up as a trusted advisor and strategic partner. If you're not setting the tone with your energy, preparation, and image, people may dismiss you before they even have the opportunity to find out if you possess Practical Wisdom, Vision, and so many other important qualities."

3. **Consider reviewing the top five strengths in this way.**
   In addition to talking about the facets as described above, you also may note some higher-level themes here. If someone has all or most of their strengths in the Character dimension, you might note that this bodes well for putting the "trust" in the "trusted advisor" part of their business context if that's what they're looking to do. If they need to drive innovation in the coming year, you could talk about strengths in facets such as Humility, Vision, Resonance, and Inclusiveness if they have them. Leaders often feel pleased and buoyed when you take the time to point out to them that they have strengths that are already serving them well and that we certainly can build on.

4. **Pick a facet that you may believe might be an over-strength, but don't identify it as such with the leader. Simply ask the leader to discuss this strength in particular.**
   Give them a working definition of the strength and ask them to describe how it shows up for them. Listen and see if it sounds like it may be an over-strength—or if it may be a strength that can be leveraged to improve a development theme. Either way, you'll often get information that you can use later in the conversation.

   Here are a few real-life examples of how people have responded when asked to describe how a strength shows up for them:

- “When you described behavioral integrity, that really resonated with me. If I have a deadline or deliverable that’s expected of me, I’m going to make that happen—no matter how many bodies I leave in my wake!” Later in that conversation, when the leader was puzzled at her low ratings in the facet of Concern, I was able to play this comment back to her and suggest that she may have an “over-strength” in Integrity.

- "The reason I score high on Confidence is because I tend to be the quarterback for projects, and I have to make decisions--the buck stops with me. Relative to other folks, I'm more vocal to make sure I understand and because I have valuable info to share. But when you mentioned that Confidence include a bias to action, well, that can be a positive and a negative for me: I need to be very execution focused and have a very strong bias to getting things done and less of a reflective approach. In my current role, I have let that muscle weaken.” In that conversation, the leader was showing me that he already had awareness that Confidence was both a strength and an over-strength for him. That understanding helped us both later in the discussion, as we could see that this “need for speed” made it difficult for qualities such as Resonance and Inclusiveness to come across.

- “I do walk the talk… in any situation. If I sign up, I'm all in. This is connected to work ethic. If I say I will show up, I show up, and I go deep.” In this case, the leader’s comments proved useful in a different way. Frequently, you’ll find that you can tie back to these comments when you’re looking for ways the leader can leverage their strengths in order to improve a development theme. This leader was an independent coach/consultant, and she needed to improve her Assertiveness and Vision. One problem was that she had such highs in Concern and Resonance that she often failed to “put on her own oxygen mask before assisting others.” As a result, she wasn’t taking the time to work on creating the thought leadership necessary to boost her reputation as a strategic leader.

  Toward the end of the conversation, I suggested that she write a regular, scheduled blog and share it with her list of clients and prospects. “I’ve been meaning to do that, but I never seem to get to that,” she told me.

  “Of course you don’t!” I said. “My sense is that’s because you’re so busy taking care of others’ needs instead of your own. But here’s an idea: Earlier you told me that you walk the talk… ‘If I sign up, I’m all in.’ So why not email your list tomorrow and tell everyone that you’ll post a new blog on the first Friday of the coming month!”

She laughed, weakly, as the realization dawned on her. "That means I would really have to do it." Exactly my point.

Whether the leader's comments reveal an over-strength or a strength that could be leveraged, it's very powerful to capture these thoughts and make use of them later in the insights conversation.

5. **Note and comment on whether their listing of strengths on the worksheet aligns with how others perceive them.**
   If the leader is listing a facet that is not rated highly with others, make note of it but assume the best of the leader: "I see that you included Authenticity as a strength. As you might have noticed, others didn't have that facet rated among your highest. What this may mean is that you DO have a strength in Authenticity… but there may be reasons why this strength is not coming across as strongly in the perceptions of others. That may be something worth exploring."

   Leaders often tend to describe their lowest-rated facets as "weaknesses," even when the facet average is fairly high. I don't let them get away with that. More often than not, the lowest-rated facet will be above 3.5 or even above 4. Could it be coming across or "showing up" more strongly? Sure. But it may be a matter of the frequency or consistency of the behavior. In some cases, I have told her a leader that they seem to have a *spirit* of Inclusiveness (or whatever), but we need to understand what's keeping that spirit from being noticed by others.

   Sometimes an analogy can help: "My sense is that it's a like a radio signal. You may be transmitting a strong signal of Inclusiveness with the best of intentions… but something may be keeping that signal from coming through. Maybe people are out of range of the signal… or perhaps there's some equivalent of a tunnel that is blocking your signal. That's something worth exploring." If it makes sense, we may explore that on the spot, or we may wait to see if it emerges through our discussion of the development themes.

6. **Make the transition to Key Development Themes.**
   I'm happiest when we're digging into the development themes around 20 minutes into the call. That gives me a good 25-30 minutes to work on them before we need to wrap up. As with the strengths, start this segment by commenting on what they captured on their Developmental Summary Worksheet on this subject. While you may have your own ideas about which lower-rated facets matter most, the ones that they write down will

signal where their interest, motivation, or anxiety is probably the greatest. As a result, working with all or several of the ones captured here will be fruitful.

7. **Plan to delve into at least three facets among the Development Themes.**

Typically, you will be able to do a relatively deep dive into at least two lower-rated facets, and you also really should get to a third. If you don't get to at least three, the exercise of narrowing down to two facets later in the conversation feels pointless! You often can at least touch on an item or two in a fourth facet.

But how to decide which facets to tackle in which order? Nothing says that you must go with the lowest-rated facet first and work your way up. There is no one right answer about how to proceed, but it's important to have a rationale in mind. Here are a few options:

- *Start with a facet that is very much top of mind for the leader:* You can make a case for beginning with the facet that the leader is most eager to explore and understand. This is particularly advisable if the leader seems to be dwelling or obsessing on that facet. If you don't go to that facet, then they may be too distracted to talk about other ones.
- *Focus first on a facet that is a leading thread:* If your sense is that the leader's primary issue is, say, Authenticity, it's more efficient to talk about that first. If we can figure out what's going on with the leading thread and what to do about it, it may preempt the need to go deeply into related facets/
- *Choose a facet that seems especially relevant because of the "lighthouse" of the business context:* If the leader has told me that their biggest need is to engage and develop their team, I might be inclined to start off by discussing Concern if it's anywhere in the bottom five facets—even if it's not one of the two or three lowest-rated facets. Concern may just matter more in that case, and I'll want to make sure we do it justice.
- *Pick a facet that seems like an easy stepping stone toward the leading thread:* Sometimes I like to start out with one of the Style facets, such as Interactivity or Inclusiveness, even if I suspect that the leading thread is something else, such as Practical Wisdom, Resonance, or Authenticity. The logic is that the Style facets are more likely to represent "low-hanging fruit" in development. For example, if we can take steps to understand why Interactivity is low, we can help the leader improve the quality and quantity of their dialogue with others. If we can improve that, then that's a first step toward increasing opportunities to improve other facets: We can't show Practical Wisdom if we aren't having regular two-way communication with people!

8. Go to the item-level pages of the report when exploring a specific facet.

This is a must-do practice. Every time you're exploring a development theme, ask the leader to turn to the appropriate page(s) for that facet, and then give them a working definition of that facet. "So let's look at the facet of Vision on pages ______. As you turn to those pages, let me remind you that Vision is equal parts strategic thinking and inspiration. So you'll see that some of these items are more the rational side of Vision, while others are more the social-emotional side of the facet."

From there, you have two choices on how to decide:

- A Socratic, open-ended approach
- A more directive, focused approach

It's great if you can do some of each. Frequently, I will use a more open-ended approach for at least the first facet we're exploring. "As you look at the six items here, what strikes you? What jumps out at you?" This allows the leader to share what seems to matter to them—which may or may not be what you would have chosen. Here we're letting the leader take ownership of where we go.

While there are obvious advantages to this approach, there are downsides as well. Inevitably, it's a more time-consuming option. If the leader is less prepared and/or less capable of pulling out nuggets from the report, progress can be slow. Even if the leader is adept at responding to this less structured approach, there is only so much time in the call for such open exploration.

With the more directive approach, you would leverage your own assumptions of where we should focus, drawing on your knowledge of the leader's business context, development goals, and worksheet comments. Here you might say: "As we look at the facet of Practical Wisdom, we can see that you're getting very high ratings on the items relating to insight and judgment. That's good news, given that you really want to show up as a strategic partner. Where you have the lowest ratings is on the first item, 'Able to appraise a complex situation and go directly to the heart of an issue,' particularly when we look at your ratings from your Manager and Manager 2. "

With either approach, we want to proceed in a similar way once we have landed on an item that seems relevant. Ask questions like this:

- "Can you think of a specific time when [NAME OF RATER GROUP] may have been less inclined to see you show up with this behavior?"
- "What do you think gets in the way of this quality coming across in the perceptions of others?"

Leaders may or may not have an example at hand. Or they may say something like, "Sure, that happens all the time!" Either way, you want to steer them to a specific situation if you can. One of my mottos is to use *patient, persistent, positive probing*:

- "Maybe it was some event that happened quite recently… or it could have been something that happened quite a while ago but that stands out in others' memories."
- "Okay, so you say it happens all the time—that's fine. But let's see if we can drill into just one moment in time where this may have happened. I often find it's helpful to hear about a specific situation."
- "What might get in the way of this quality coming across in the eyes of others?"

Yet another option is to read a few of their open-ended comments from the end of the report. You should know going into the call which of those comments could be tethered to which facets, as this can be extremely helpful in triggering a leader to pull out a memory.

Once the leader describes a specific situation, you can then get them to articulate the impact of their behavior as well as other choices they could make in similar situations:

- "We want to tie this back to our business context: What was the impact of your behavior on your ability to [shepherd people through a time of change/show up as a strategic partner/get people excited about the future, etc.]?"
- "Do you know the movie *Groundhog Day* with Bill Murray? Let's think about the situation you just described. If you had to go back and relive that day again and again until it went perfectly, what would that look like? What could you do differently to better [shepherd people through change/show up as a strategic partner/etc.]?"
- "Do you know the movie *Back to the Future*? Let's say that we could jump into one of those DeLorean time machines and go six months into the future. If we could see you doing a great job of showing up with that behavior, what would that look like? And how would you get there from here?"

Sometimes a "what would good look like" question is the most productive, as the individual is less likely to get bogged in the specifics and complexities of the old situation. Regardless the main point here is that you're trying to get the leader to come up with solutions rather than solving the problem for them.

No doubt you will be generating your own ideas about what the leader can or should do at this point in the call. But, for now, save them. You can share them in the last 10 minutes of the call. If you do intervene at this stage, it's better to just give them more information about the model:

- “As we think about Authenticity, there’s a slogan that we like to keep in mind: ‘Avoid the void.’ When leaders are rated low in Authenticity—if we’re not sure what they’re thinking or feeling, for example—it will create a void in others’ perceptions. Unfortunately for you and me and everyone, human beings don’t like voids, so they tend to fill them—usually with negative assumptions.”
- “If it’s any consolation, Vision is the facet that gets the lowest ratings on average of all 15 facets in the model. So this facet is challenging not just for you but for many, many leaders.”
- “When we talk about Confidence, we like to mention an African proverb: ‘If you want to go fast, go alone. If you want to far, go together.”

If a leader is stuck or puzzled, you also may float a hypothesis about what explain the lower ratings on a facet or item:

- “When we discussed your strength in Restraint earlier, you mentioned how you are fairly introverted and that taking more processing time helps you come across as more careful and calm. One hypothesis I might make here is that this quality might also be an over-strength: It may explain why you’re getting lower ratings on items relating to decisiveness in Confidence.”
- “Earlier we talked about your strengths in Authenticity and Practical Wisdom. That means people are hearing a lot of what YOU think, how YOU feel, and all about YOUR insights. But I wonder if that also creates less room for qualities that require more focus on the other person, such as Resonance and Inclusiveness, where you’re rated lower.”
- “When you described how Interactivity shows up for you, you talked about how you’re always available to others—people can interrupt you at any time, even in a one-on-one meeting. So when I see lower ratings on items suggesting that you could be more proactive and focused on the bigger picture, one hypothesis I would have is that this “always-available” mentality may be keeping you in the weeds. But what do you think?”

Note in these examples that we’re not suggesting any action steps just yet. We’re just sharing ideas and hypotheses to stimulate dialogue and insights. You want to be careful not to tell people what to think here, and sometimes a leader will reject your hypothesis. That’s fine: You won’t be right every time, and the leader may not be ready to accept it even you are. What we’re really looking to do is get the leader to reflect on experiences and build self-awareness. We’ll wait until the final phase before weighing in on what to do about it.

9. **Manage the clock!**

You really need to save at least 10 minutes for the last part of the call—the wrap-up. If you're at the 45-minute mark, you probably need to turn your attention to the next three steps below.

10. **Identify one or two "leading threads."**

We don't want to overwhelm the leader with information. Therefore, we try to see if there are a couple of leading threads. Maybe the leader needs to focus on slowing down and actively listening to others' ideas. Perhaps the leader must figure out new ways to show up more ready to share thoughts, feelings, and insights. Frequently there are a few different threads that explain lower ratings across model.

11. **Acknowledge and discuss the potential obstacles to development from the Developmental Summary Worksheet.**

If you haven't already addressed these obstacles while discussing the lower-rated facets, this is your chance to make sure that you've covered anything that may get in the way.

12. **If you have not already discussed the questions from the last section, "Follow-up with Coach and Raters," address them now**.

Time permitting, you want to tie up any loose ends from this "head-scratcher field" from the Developmental Summary Worksheet.

WRAP-UP PHASE (10 minutes)

In this short final phase, you are really taking off your coach/facilitator hat and putting on a consultant hat. This is where you will need to take a more directive approach with the leader, building on any ideas they shared about actionable feedback earlier and adding your own.

1. **Specify two development themes.**

Give the leader two development themes in the form of the facets. For example, you might land on Restraint and Practical Wisdom, or on Resonance and Inclusiveness. In some cases, you may feel that two facets are so intertwined that you can combine them into one development theme: It would not be unusual to see Authenticity/Assertiveness and Vision as a leader's two themes… or maybe Restraint/Composure and Resonance.

How do you land on the two themes? I find it helpful to ask myself: "If I could only get the leader to improve in two areas, which ones would likely lead the maximum impact, given their business imperatives?" For example, I might reason that if the leader can improve Resonance, then we could expect to see this greater attunement to others' thoughts and feelings yield benefits in Practical Wisdom, Inclusiveness, Vision, and Concern to name a few. It we could increase Interactivity, I would hope to see benefits in Humility, Resonance, Concern, and any number of other areas. Repeatedly, we've found that focusing on two areas usually leads to gains in several others.

2. **Offer initial ideas on making the feedback actionable for the key development themes.**

During my insights conversations, I often say, "If you were to come out of this conversation saying, 'That was interesting; I wonder if I will ever use it?" then I would be deeply disappointed with that outcome!" Once the leader has some new self-awareness, we want to make sure that we give them some specific strategies to take action on them. What are some new behaviors that the leader could apply immediately? Are their mental models, quotes, tools, tips, or experiences that you can share? Don't discount the power of sharing your own experiences of what you have seen work for other leaders as well as what's worked for you!

That said, you also want to give the leaders ideas that are within their capabilities.   I find that "Fake it until you make it" has limited value as a mindset in coaching leaders. You often will hear leaders express anxiety about how trying out new behaviors will make them seem inauthentic. So we need to make them feel that they have new approaches that are within their character as well as their capabilities.

This is where the concept of leveraging strengths comes into play. Think about how their existing strengths could be tapped to work on a development need. For example:

- If a leader struggles with Practical Wisdom due to their humble, assuming nature, we might encourage them to leverage Concern if they're high in that area. In other words, get them to think of sharing insights as form of helping others get what they need rather than about advancing your own agenda.
- If someone needs to get better at Vision, what to do if their objection is that "I'm just not visionary." You could get them to leverage other facets rated high—perhaps Resonance, Inclusiveness, and Humility—to get others involved in generating the vision.
- For leaders who are high in Integrity, you might get them to start making promises to others about changes they intend to make… because they are the leaders who will walk the talk and follow through on commitments.

3. **Wrap up by asking the leader to play back what they found to be helpful, powerful, relevant, surprising, and so on during the call.**

   The last question I always ask is: "To wrap up, I'd like you to reflect on the process—how we conducted this conversation—as well as the content—what insights we generated. As you think about our process and content today, was this valuable? And, if so, tell me what was particularly powerful, relevant, useful, surprising for you—or any other way you'd like to finish that thought."

   It's always interesting to get feedback at this point in the process and to learn what really landed with the leader. Quite often, I'm surprised that what they remember is not a fancy observation on my part but often a little quote, tidbit, question, or observation—just something that seemed to unlock an epiphany.

4. **Discuss any next steps, including what documents you may share with the leader after the meeting, such as links to relevant articles and our article on how to have follow-up conversations with raters. Caution the leader against following up with raters until they have had time to process today's conversation and read the article.**

   If this call precedes a program or coaching or some other next step, we'll discuss what will happen next. Beyond that, I always follow up the conversation with an email summarizing what we covered and offering a few articles or links that may be helpful in light of the development themes. I always include our document on how to have follow-up conversations with raters. I will tell the leader: "The research indicates that leaders who follow up with their raters after this type of assessment tend to improve more and improve faster. Of course, there are good ways and not-so-good ways to have conversations with raters. Please read the document that I will send you before you discuss your data with anyone. I also might remind the leader that going back to raters is a great first step if they really want to show people some facets such as Humility, Resonance, and Interactivity.

FINAL THOUGHTS

It can be easy to put a great deal of pressure on yourself when you're learning how to deliver great insights calls with the Bates ExPI™. While there's no question that your competence and confidence will improve over time, don't underestimate how much value you can add by asking great questions, listening with a curious mind, and sharing insights drawn from your own experience. Just as we want to help leaders focus on their positives, you also should remember to focus on the part of the cup that is already very full for you as a coach and insights provider.