



Cortex Leadership Consulting **Coaching Dave Bartels** **to Peak Performance**

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Created for:
Peter Kinsley
Haskell



www.cortexleadershipconsulting.com



1327 Grandin Rd SW, Roanoke, VA 24015

info@cortexleadership.com



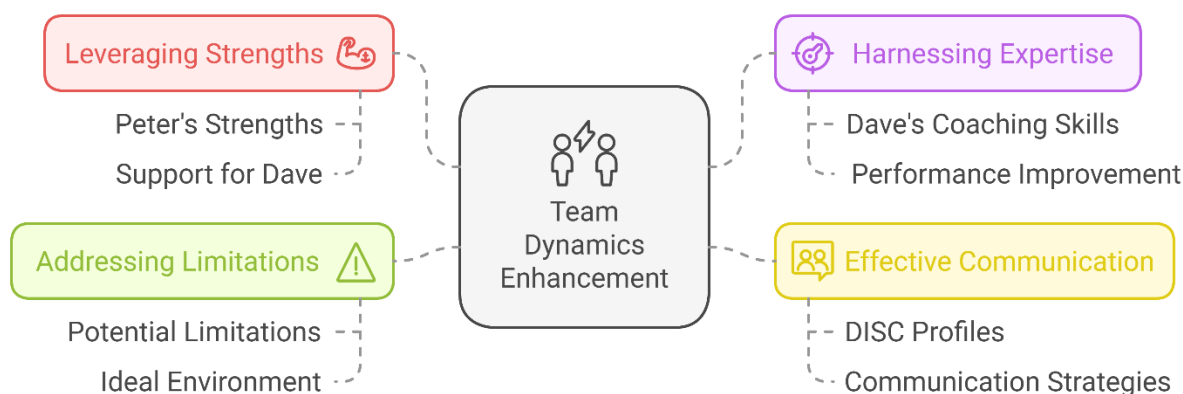
Leaders Coaching for Peak Performance

Prepared for Peter Kinsley
Team Member: Dave Bartels

Executive Summary

This playbook is designed to help Peter Kinsley coach Dave Bartels to achieve peak performance in his role. It leverages Peter's strengths in strategic thinking, results orientation, and relationship-building while capitalizing on Dave's strengths in coaching, consulting, and leadership. Using insights from DISC, Driving Forces, and EQ assessments this customized strategy provides actionable approaches for Peter to support Dave's success.

Key areas of focus include:



- Leveraging Peter's strengths to support Dave's growth.
- Harnessing Dave's expertise in coaching and consulting to drive performance.
- Effective communication strategies based on DISC profiles.
- Addressing potential limitations and fostering an ideal environment for Dave to thrive.

Peter's Strengths and How to Use Them to Coach Dave

Peter's Key Strengths

- **Strategic Vision:** Peter is forward-thinking and excels at aligning tasks with organizational goals.



- **Results-Driven Leadership:** Motivated by achieving outcomes and fostering accountability.
- **Strong Communication Skills:** Peter's ability to present ideas concisely supports clear guidance.

Coaching Strategies

- **Align Goals with Vision:** Link Dave's responsibilities to broader organizational strategies.
 - **Provide Specific Feedback:** Regularly share actionable feedback to reinforce strengths and address gaps.
 - **Collaborate on Solutions:** Work together to troubleshoot challenges and build consensus.
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Dave Bartels' Strengths to Leverage

Key Strengths

- **Coaching Expertise:** Skilled at developing others and enhancing team performance.
- **Adaptability:** Thrives in dynamic environments and handles complex challenges with agility.
- **Relationship Management:** Builds trust and drives collaboration across teams.

How to Leverage These Strengths

- **Maximize Coaching Abilities:** Assign responsibilities that involve mentoring or developing team members.
 - **Encourage Innovative Thinking:** Provide opportunities for Dave to implement creative solutions.
 - **Recognize Collaboration Efforts:** Acknowledge Dave's ability to unify teams to achieve shared goals.
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Dave's Challenges in Execution

Key Challenges

- **Balancing Strategic and Tactical Demands:** May over-focus on immediate tasks at the expense of long-term objectives.
- **Managing Competing Priorities:** Struggles to prioritize when multiple demands or competing priorities arise simultaneously.

Recommendations

- **Structured Goal Setting:** Help Dave identify key priorities and focus on high-impact initiatives.



- **Time Management Strategies:** Provide tools to streamline decision-making and task prioritization.

Motivational Techniques

Tailored Motivation for Dave

- **Recognize Leadership Wins:** Privately acknowledge Dave's contributions to team development.
- **Link Efforts to Outcomes:** Highlight how his actions align with organizational success.
- **Support Learning Initiatives:** Encourage professional growth through training or coaching programs.

Effective Communication Strategies



Do's

- Be direct and concise, ensuring expectations are clear.
- Provide written follow-ups to reinforce agreements.
- Explain the “why” behind decisions to align with Dave's strategic mindset.

Don'ts

- Avoid micromanaging; Dave values autonomy.
- Refrain from vague or overly broad instructions.
- Do not pressure him with unrealistic deadlines or expectations.

Key Phrases to Motivate Dave

- “Your coaching efforts are making a significant impact on the team.”

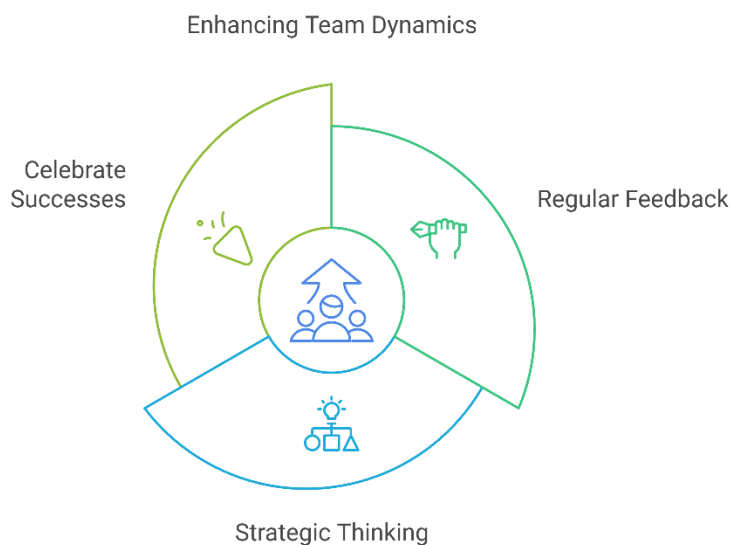


- “I value your ability to handle complex challenges with clarity.”
- “Let’s collaborate on solutions to ensure you have the support you need.”
- “Your leadership is instrumental in achieving our goals.”

Creating Dave’s Ideal Environment

- **Empowerment and Autonomy:** Provide flexibility for Dave to make decisions within clear frameworks.
- **Opportunities for Growth:** Encourage ongoing learning and professional development.
- **Collaborative Culture:** Foster an environment where Dave’s contributions are valued and celebrated.

Action Items for Peter to Support Dave’s Peak Performance



1. **Provide Regular Feedback:** Schedule one-on-one sessions to discuss progress and address challenges.
2. **Foster Strategic Thinking:** Align discussions with long-term goals to enhance strategic focus.
3. **Celebrate Successes:** Recognize achievements to maintain motivation and engagement.



Quick Coaching Guide for Peter to Coach Dave Bartels

Quick Tips for Coaching Preparation

1. **Set the Stage:**
 - Choose a distraction-free environment for focused conversations.
 - Begin each session by acknowledging recent achievements.
 2. **Clarify Goals:**
 - Align the session objectives with both organizational and individual priorities.
 3. **Be Present:**
 - Minimize interruptions and actively listen to Dave's input.
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Key Coaching Focus Areas

1. Leveraging Dave's Strengths

- **Coaching Expertise:**
 - Assign mentoring roles or tasks where Dave can develop team members.
 - Highlight the impact of his coaching efforts on team performance.
- **Adaptability:**
 - Involve Dave in dynamic, fast-paced projects requiring quick decision-making.
 - Recognize his ability to navigate complex challenges with agility.
- **Relationship Management:**
 - Encourage collaboration by leveraging Dave's natural trust-building skills.

2. Addressing Dave's Challenges

- **Balancing Strategic and Tactical Work:**
 - Help Dave focus on long-term goals by setting clear priorities.
- **Managing Competing Priorities:**
 - Streamline decision-making.

Motivational Techniques

- **Recognize Leadership Wins:**



- “Your mentoring has significantly improved team morale and efficiency.”
 - **Link Efforts to Outcomes:**
 - “Your contributions directly align with our strategic objectives.”
 - **Support Learning Initiatives:**
 - Provide opportunities for training and professional growth.
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Effective Communication Strategies

Do's:

- Be direct and concise & Provide written follow-ups to ensure clarity and alignment.
- Explain the rationale behind decisions to appeal to Dave's strategic mindset.

Don'ts:

- Avoid micromanaging; focus on outcomes rather than minute details.
 - Refrain from vague instructions that could lead to confusion.
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Creating Dave's Ideal Environment

- **Empowerment:**
 - Provide autonomy to make decisions within a structured framework.
 - **Growth Opportunities:**
 - Encourage professional development through workshops or training.
 - **Collaborative Culture:**
 - Foster a supportive environment where his input is valued.
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Action Checklist for Peter

1. Provide clear, actionable feedback after each coaching session.
2. Collaborate with Dave to prioritize tasks and focus on high-impact projects.
3. Recognize Dave's contributions in one-on-one discussions.
4. Support professional development initiatives to enhance his coaching and leadership skills.