

How to T.R.A.I.N. my CEO/CFO Without getting fired



The Evolution Of The Modern IRO



The investor relations (IR) role has evolved in response to the demands of more sophisticated investors and a faster-paced global environment.

To thrive in this environment, today's investor relations officer (IRO) needs a keen understanding of external industry dynamics and key forward-looking indicators in order to properly anticipate external developments and **prepare senior management to respond.**

The Chiefs' Jester



“At the top, the chief as much as a king of old times is much envied, surrounded by backstabbers and ‘yes men’.

Whom to trust, whom to turn to, to bounce ideas and provide a different view, objectivity and clarity?

Free from ulterior motives the ‘Jester Coach’ is the ultimate sounding board, who with wit and courage probes and inspires the mighty one to further his/her growth and greatness”

"I'll be back"



2. Jahreskonferenz

Deutscher Investor Relations Kreis

3./4. Mai 1999 · Frankfurt Marriott Hotel



Dr. Ferdinand Graf
von Ballestrem



Ulf Brackmann



Ralf P. Brammer



Jens-Eric
von Düsterlho



Dr. Jürgen Dunsch



Leonhard H.
Fischer



Referenten:

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Ulf Brackmann, Director, International Accounts, Technimetrics
Ralf P. Brammer, Mitglied des Direktoriums/Leiter Investor Relations,
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Lorne K. Campbell, Geschäftsführer,

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Lorne K. Campbell



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Geoffrey V. Hopper



VIEWS OF CHANGE

“Change is the only constant”

Heraclitus of Ephesus (c.535 BC - 475BC)

“Nobody can go back and start a new beginning, but anyone can start today and make a new ending.” *Maria Robinson*

“There is nothing wrong with change, if it is in the right direction”
Winston Churchill

“Any change, even a change for the better, is always accompanied by drawbacks and discomforts.” *Arnold Bennett (British novelist, playwright, critic, and essayist, 1867-1931)*

T.R.A.I.N. my CEO/CFO™



- T ...
- R ...
- A ...
- I ...
- N ...

T.R.A.I.N. my CEO/CFO™

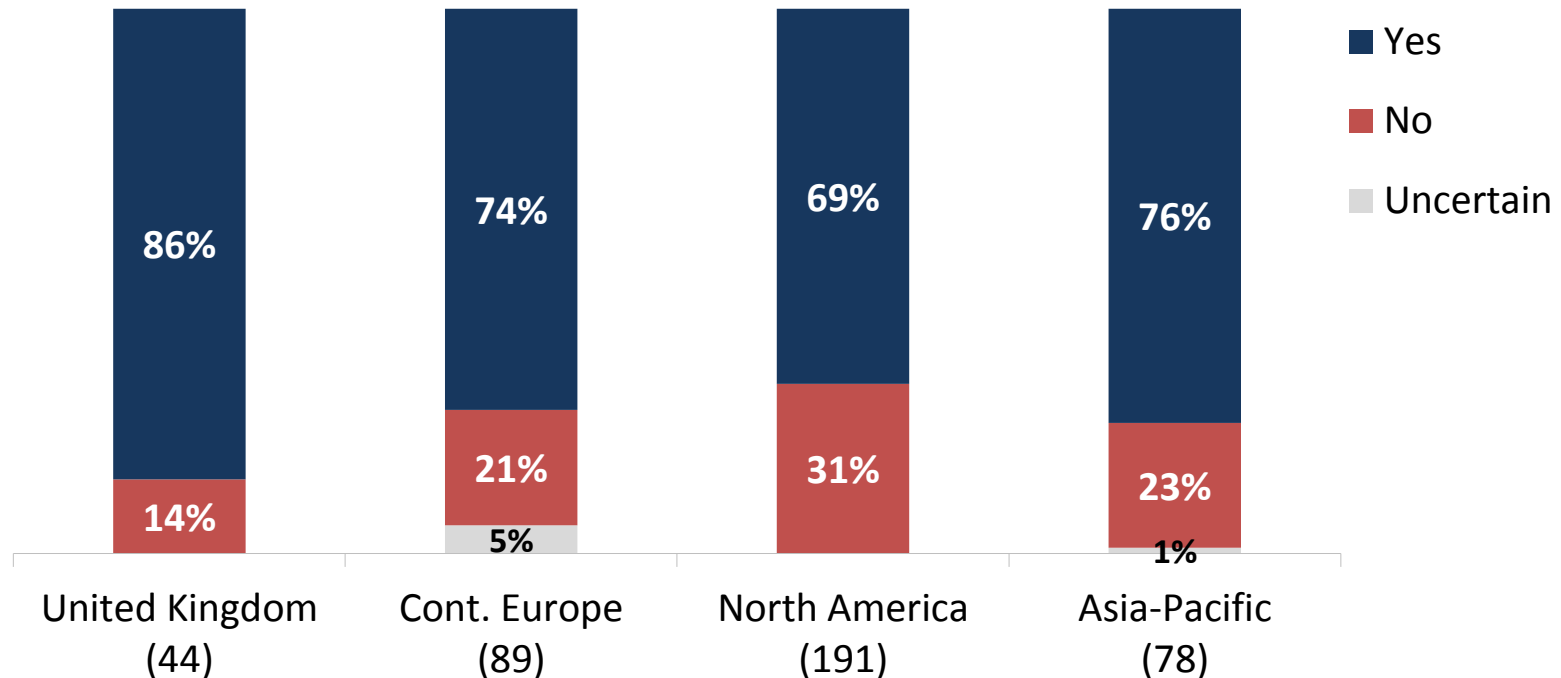


- T ...
- **REALITY**
- A ...
- I ...
- N ...

Does IR affect valuation? (Buy-side perspective)

Whether Good IR Affects a Company's Valuation (Aided) - *by Region*

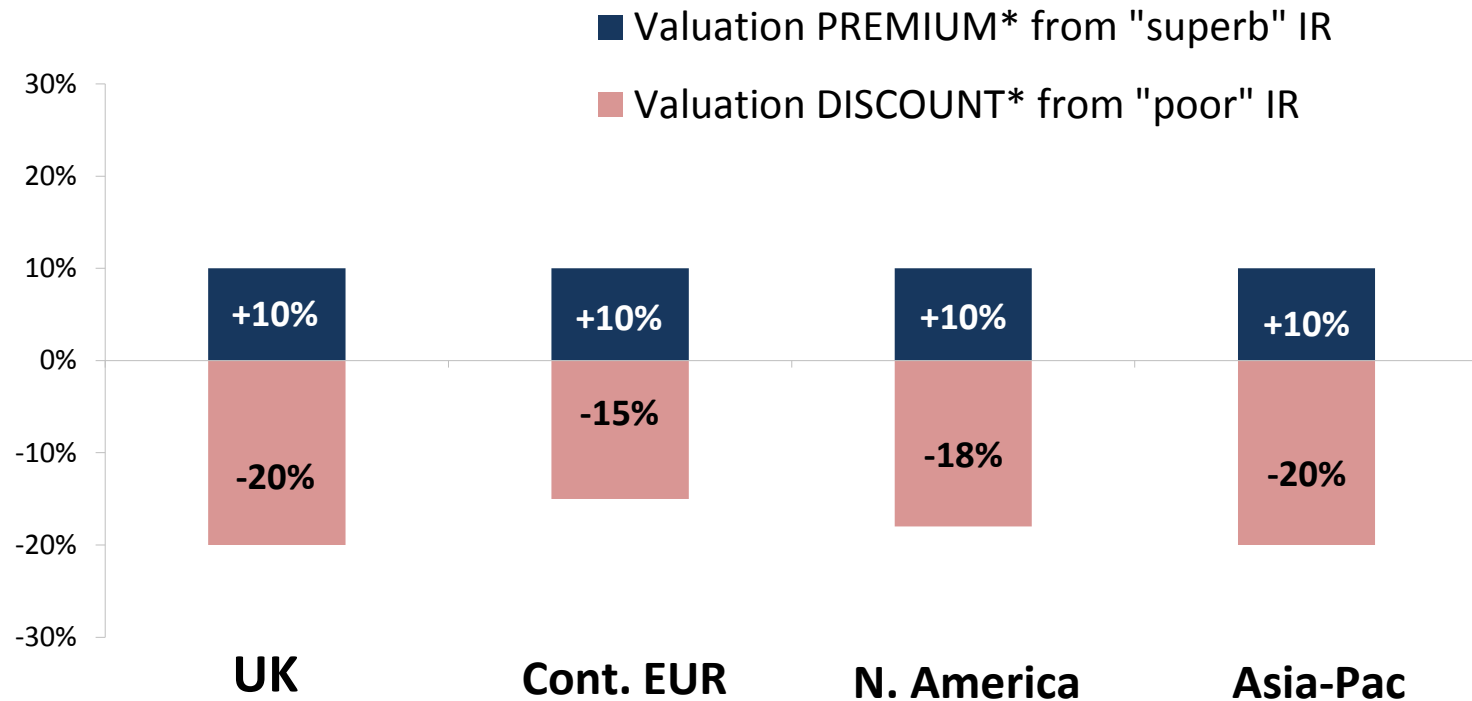
(July 2013)



How much? (Buy-side perspective)

Impact on Valuation of Superb versus Poor IR* (Unaided)

(Among respondents who believe IR affects a company's valuation, July 2013)

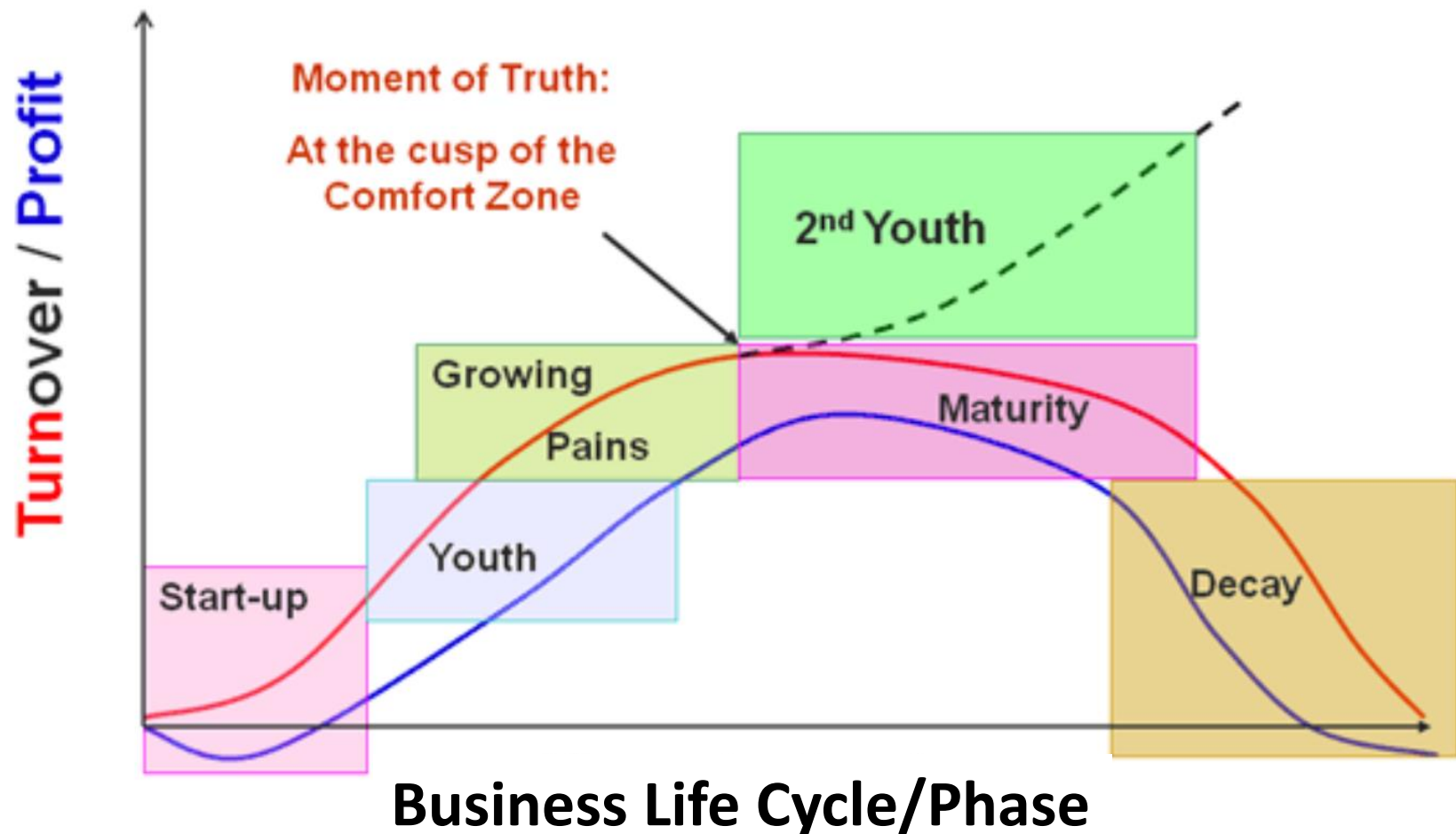


* Median

Biz Life Phase & Leader Type



What CEO/CFO Type will fit each Phase best?





The four dimensions of type

Extraversion and **I**ntroversion

Where you prefer to get and focus your 'energy' or attention

Sensing and **i**Ntuition

What kind of information you prefer to gather and trust

Thinking and **F**eeling

What process you prefer to use in coming to decisions

Judging and **P**erceiving

How you prefer to deal with the world around you, your 'lifestyle'

MBTI -Type Preferences



TYPE PREFERENCES					
Where you focus your attention	E	Extraversion People who prefer Extraversion tend to focus their attention on the outer world of people and things.	Where you focus your attention	I	Introversion People who prefer Introversion tend to focus their attention on the inner world of ideas and impressions.
The way you take in information	S	Sensing People who prefer Sensing tend to take in information through the five senses and focus on the here and now.	The way you take in information	N	Intuition People who prefer Intuition tend to take in information from patterns and the big picture and focus on future possibilities.
The way you make decisions	T	Thinking People who prefer Thinking tend to make decisions based primarily on logic and on objective analysis of cause and effect.	The way you make decisions	F	Feeling People who prefer Feeling tend to make decisions based primarily on values and on subjective evaluation of person-centered concerns.
How you deal with the outer world	J	Judging People who prefer Judging tend to like a planned and organized approach to life and prefer to have things settled.	How you deal with the outer world	P	Perceiving People who prefer Perceiving tend to like a flexible and spontaneous approach to life and prefer to keep their options open.

ESTJ



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ESTJ



ESTJ

Darth Vader



The Supervisor

Practical, realistic, matter-of-fact. Decisive, quickly move to implement decisions. Organize projects and people to get things done, focus on getting results in the most efficient way possible. Take care of routine details. Have a clear set of logical standards, systematically follow them and want others to also. Forceful in implementing their plans.

ESTJ



The Narcissistic Leader



- **Has a grandiose sense of self-importance, Exaggerates own importance**
- **Is preoccupied with fantasies of unlimited success, power, brilliance, ...**
- **Believes that he or she is “special”, Exaggerates achievements and talents**
- **Is often envious of others or believes that others are envious of him or her**
- **Requires excessive admiration, Is easily jealous**
- **Has a very strong sense of entitlement, Has unreasonable expectation of favourable treatment**
- **Is exploitative of others, Takes advantage of others to reach his or her own goals**
- **Disregards the feelings of others, lacks empathy**
- **Regularly shows arrogant, haughty behaviours or attitudes**
- **Requires constant attention and positive reinforcement from others**
- **Reacts to criticism with anger, shame or humiliation**



The Noxious Leader, transmitter of stress

Character

Is it what they do, or who they are? Abuse vs. exploitation

Background

What drives this, past, present, internal, external, do they see it?

Sense making

Assumptions about leadership and what raises performance

Behavior patterns

Limits of what has possibly worked in the past.

Culture clashes & organization context

Problems when east meets west or shifting culture in an organization.

Personality Disorders and Corresponding Healthy Personality Styles

▪ Paranoid PD	Vigilant
▪ Schizoid PD	Self-sufficient
▪ Schizotypal PD	Creative
▪ Antisocial PD	Daring
▪ Borderline PD	Passionate
▪ Histrionic PD	Dramatic
▪ Narcissistic PD	Self-confident
▪ Obsessive-compulsive PD	Conscientious
▪ Dependent PD	Loyal
▪ Avoidant PD	Socially sensitive
▪ Passive aggressive PD	Leisurely

REALITY



- Role Clarification (CEO, CFO, RoBs, IRO)
- CEO & CFO Stereotypes, Characteristics, Personality Type (MBTI, A, NLP Meta Programs)
- Application MBTI (Communication, Processing of Information, Work Processing, Stress Management, Conflict Management, Team Playing)
- Narcissism in Leaders (The Good vs The Bad)

T.R.A.I.N. my CEO/CFO™



- **TRANSFORM**
- **REALITY**
- **A ...**
- **I ...**
- **N ...**



Implications for coaching the noxious leader

Character – Behaviors or really them. Are they snakes in suits?

Background

What in their history sets them up to be this way

What really matters to them?

What problem are they solving by being "tough."

Is this really serving them?

Sense-making

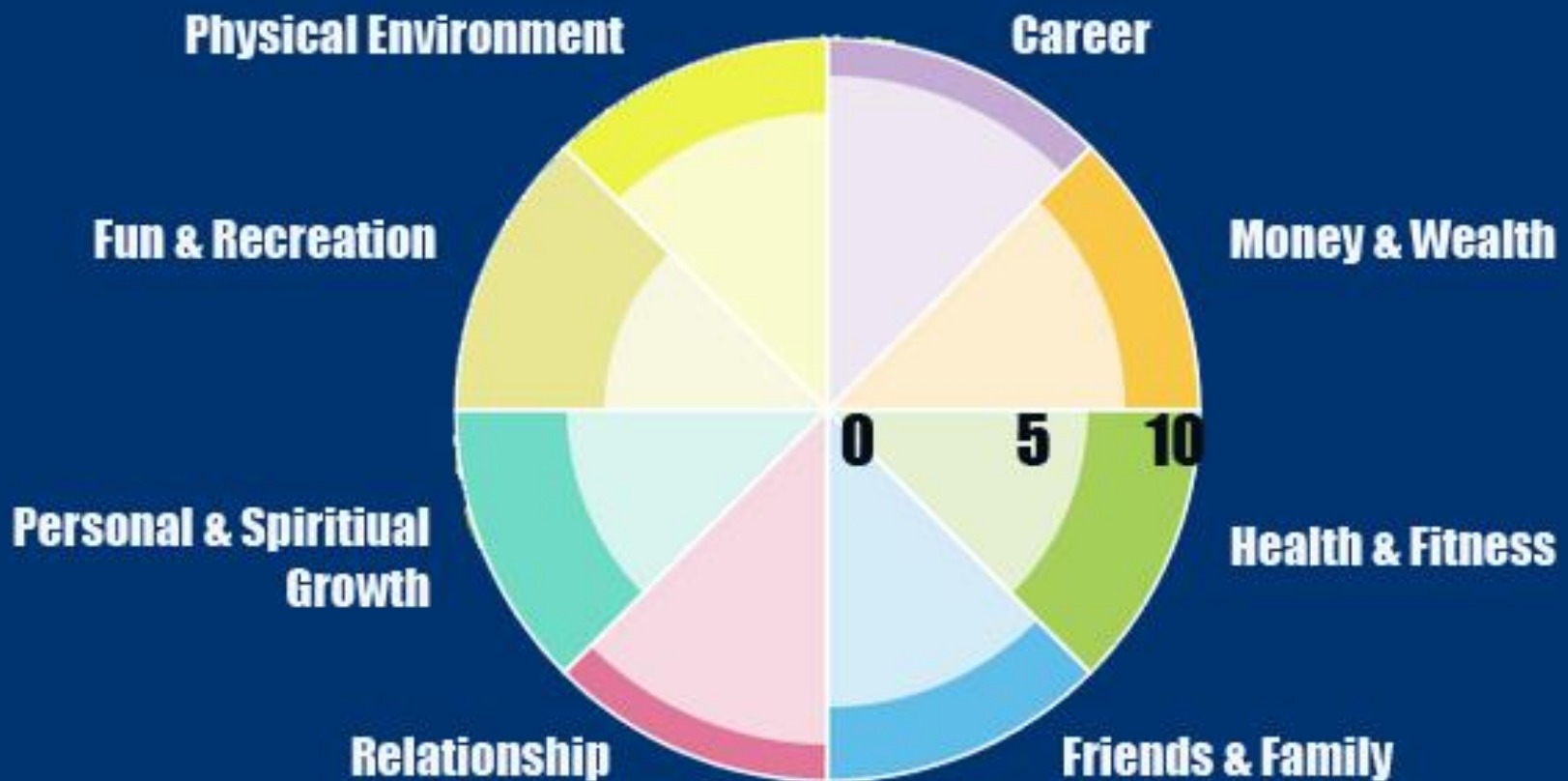
Explore mindset – growth or rigid

Search for blind spots and connect the dots through feedback

Examine how noxious behavior is overusing strengths

Develop the "four pathways" what ELSE can they think..

WHEEL



TRANSFORM



- In an Ideal World ...
- GAP Analysis
- All Areas (Positive Psychology)
- Adult Learning Theories & Models
- Behaviour
- Skills
- Beliefs
- Values
- Identity



Implications for coaching the noxious leader

Behavior patterns

- New patterns required at higher levels, what do they need now?
- Frame issue in light of leadership identity and development
- What positive patterns can they use more often

Culture clashes & organization context

- Build of awareness of larger context – geography & organizational
- Pressures to be Turn- arounder – but then things shift
- What are organization buffers or drainers
 - other leaders, peer support
 - Organization purpose and mission.

How To Get What You Want



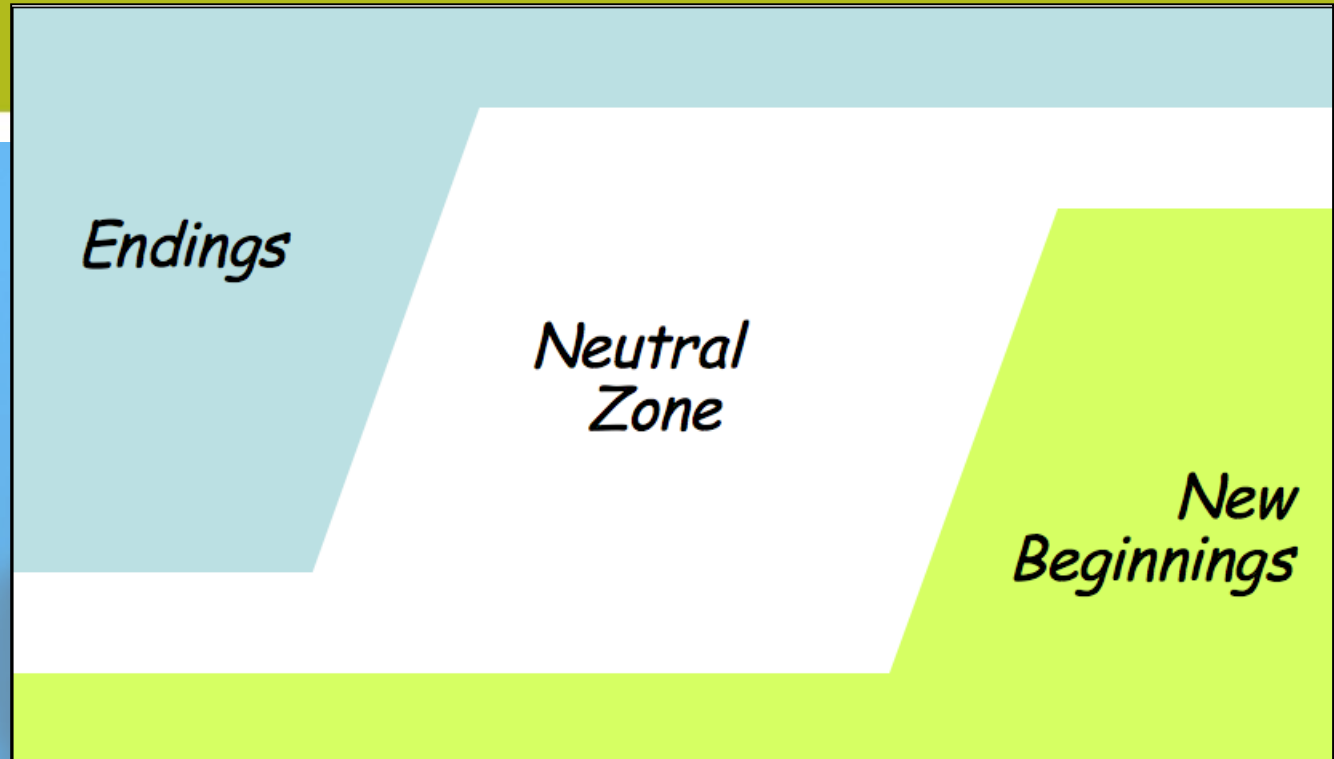
RESULTS	HAVE	COACHING, L&D	Learning Theory
Behaviour	DO	Performance Transactional	Behaviourism
Skills	DO	Skills Transactional	Behaviourism
Beliefs	BE	Developmental Transformational	Cognitivism, Constructivism
Values	BE	Developmental Transformational	Cognitivism, Constructivism
Identity	BE	Developmental Transformational	Cognitivism, Constructivism

“STAGE MODELS”

PSYCHOLOGICAL ADJUSTMENT



William Bridges



*“It isn’t the changes that do you in, it’s the transitions. Change is not the same as transition. Change is situational: the new site, the new boss, the new team, the new policy. Transition is the psychological process people go through to come to terms with the new situation. **Change is external, transition is internal**” Bridges (1995) p3.*

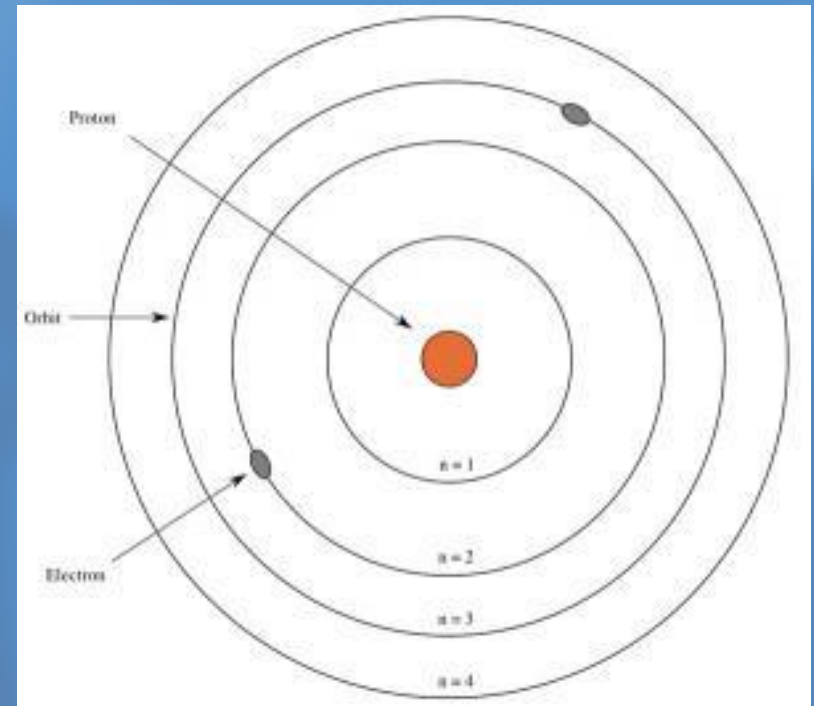
Quantum Leap



$U_{cM} > CM$

$C > E$

‘Act As If’



T.R.A.I.N. my CEO/CFO™



- **TRANSFORM**
- **REALITY**
- **A ...**
- **I ...**
- **NEGOTIATE**

NEGOTIATE



- GAP Model & Force Field Models
- NLP Communication Model
- Respect for the others 'Model Of The World'
- 'The Law of Requisite Variety'
- The Power of Rapport
- The Responsibility of Communication
- Negotiation Techniques (open vs covert)

GAP MODELS – DRIVING AND RESTRAINING FORCES USING ‘FORCE FIELD ANALYSIS’

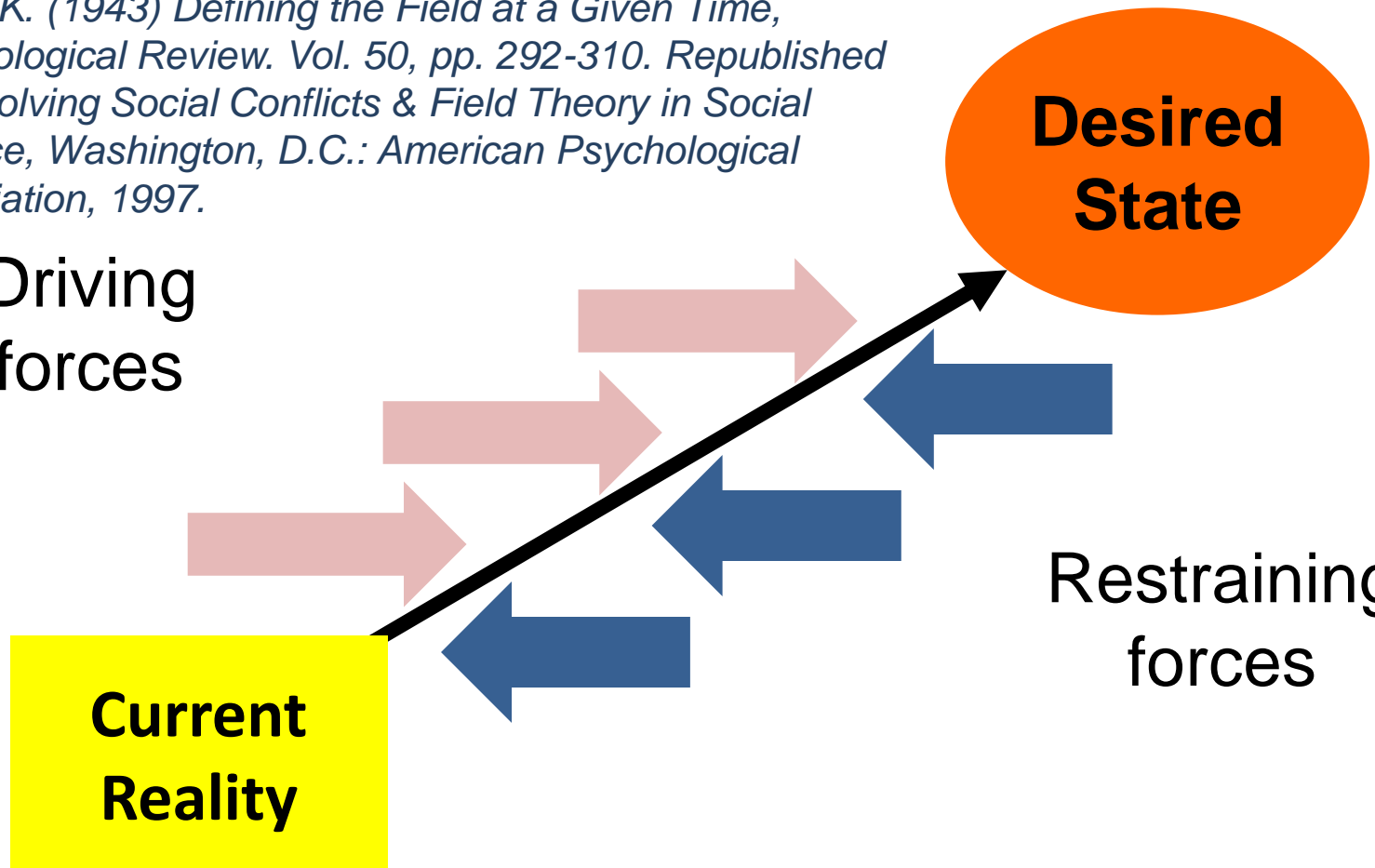
Lewin K. (1943) Defining the Field at a Given Time, Psychological Review. Vol. 50, pp. 292-310. Republished in Resolving Social Conflicts & Field Theory in Social Science, Washington, D.C.: American Psychological Association, 1997.

Driving
forces

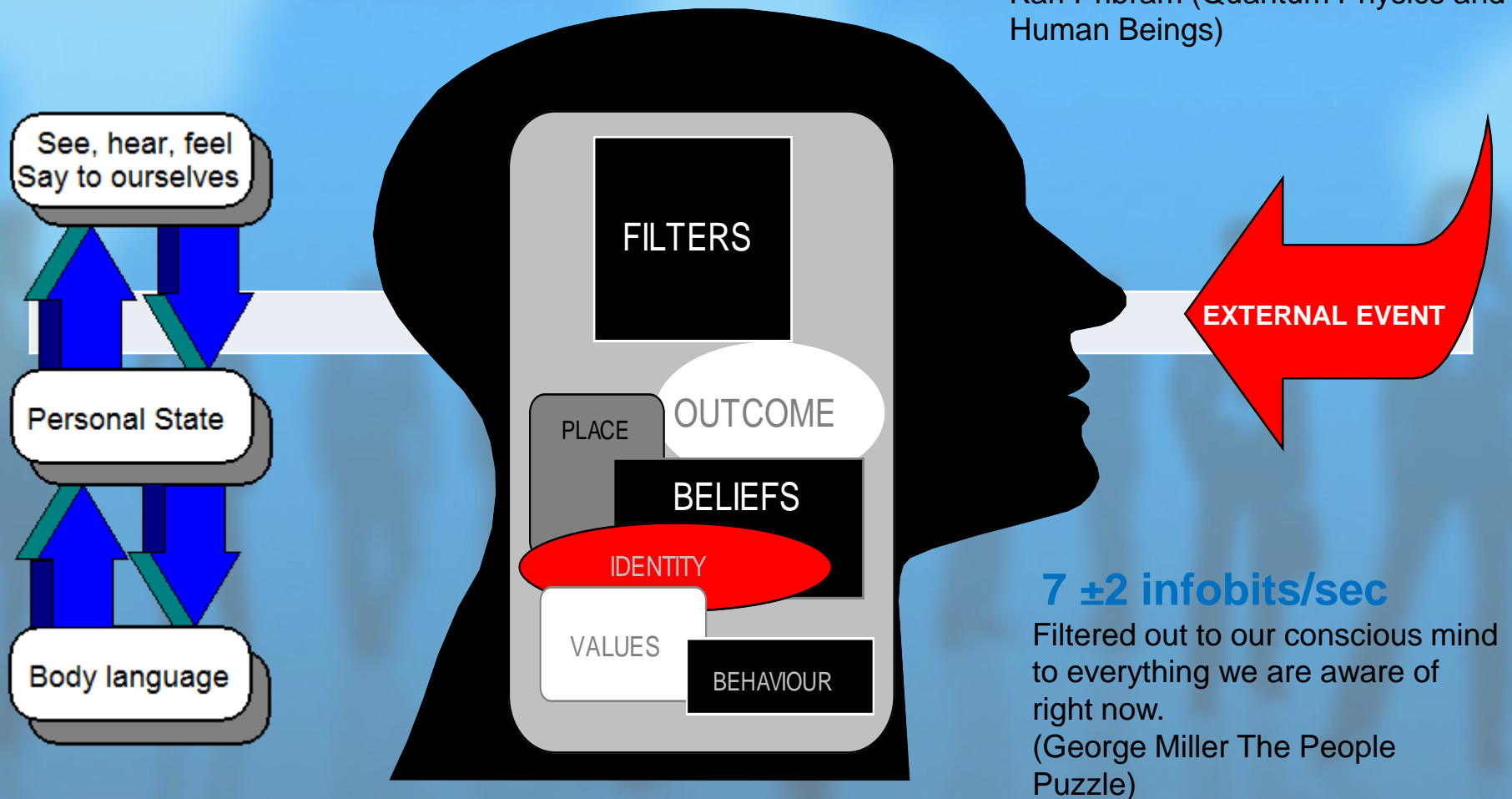
**Current
Reality**

**Desired
State**

Restraining
forces



NLP Communication Model



T.R.A.I.N. my CEO/CFO™



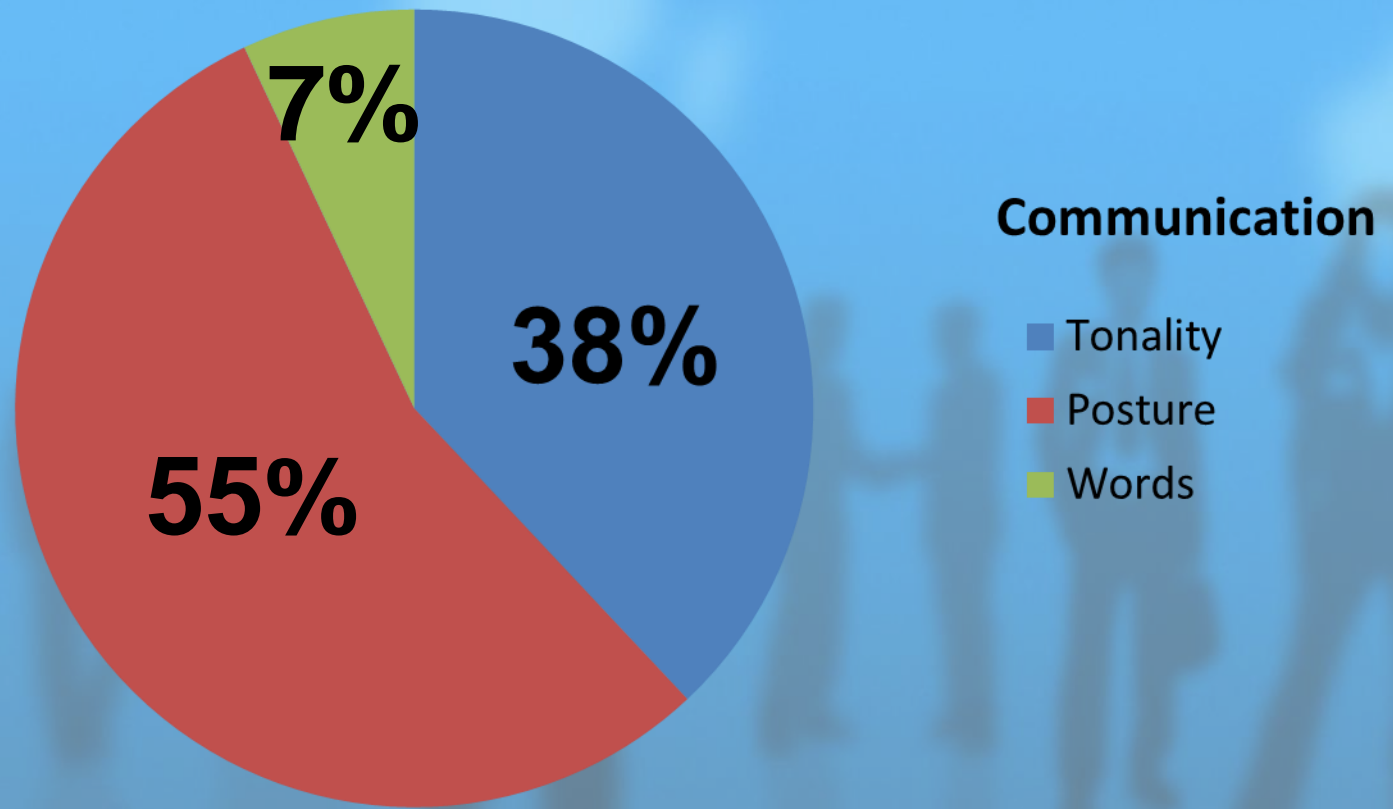
- **TRANSFORM**
- **REALITY**
- **A ...**
- **INFLUENCE**
- **NEGOTIATE**

INFLUENCE



- Language (Milton-M, Meta-M, Prefix)
- Representational System (VAKOG)
- The Power of Rapport
- ‘Covert’ > Open, but ecological
- 4-Mat
- 6-Step-Logic
- Unconscious > Conscious

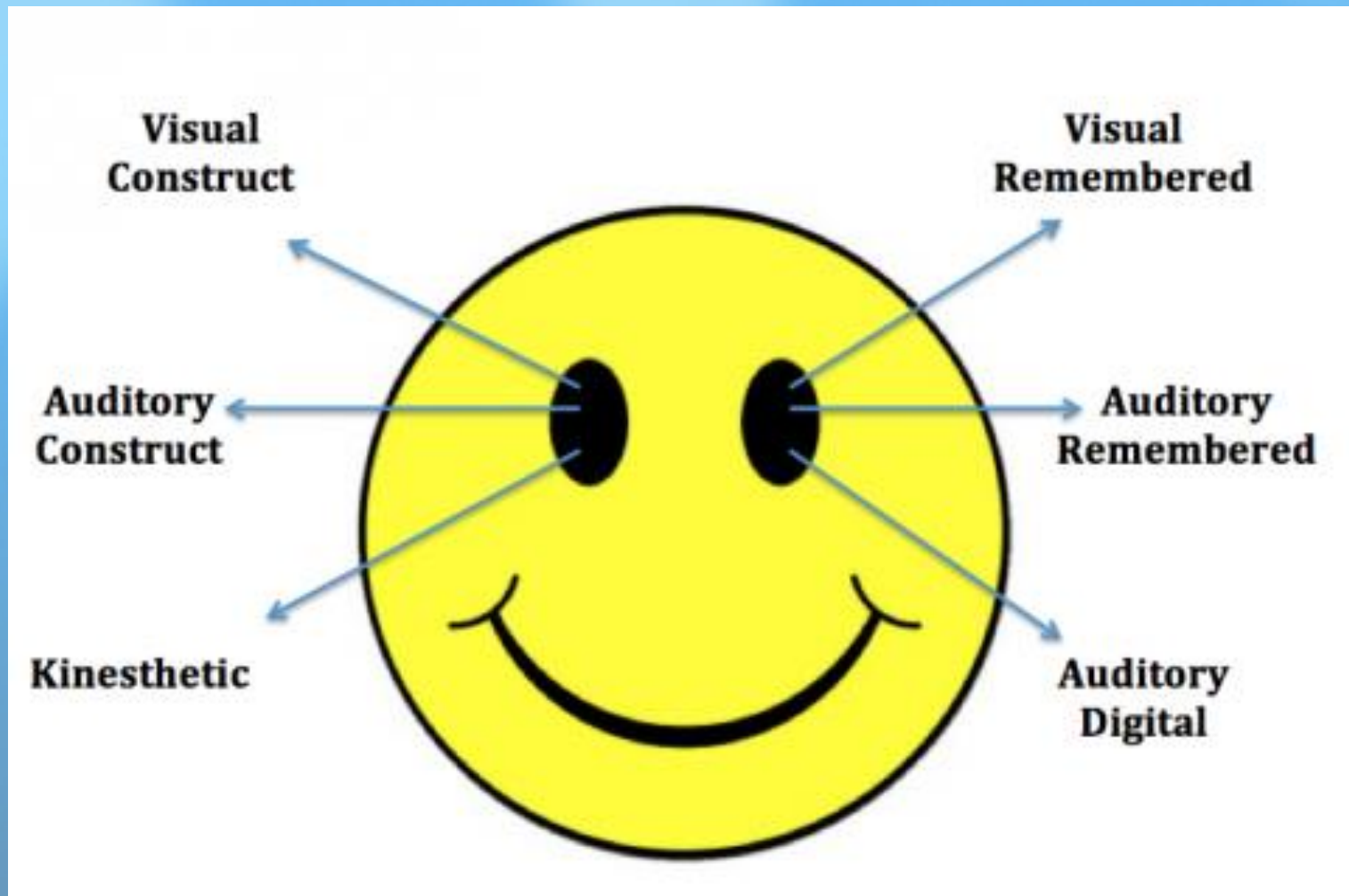
Bonding Instant Rapport



When People are like each other, they like each other.



Making Sense



T.R.A.I.N. my CEO/CFO™



- **TRANSFORM**
- **REALITY**
- **ACTION**
- **INFLUENCE**
- **NEGOTIATE**

ACTION



- Disney Creativity
- Board Team Building
- Bespoke P.O.W.E.R. P.I.T.C.H.I.N.G
- Positions of Perceptions
- Conflict Clearing
- Counselling , Psychotherapy
- External 1:1 Coaching ‘The Chiefs’ Jester’

IRO AS CHANGE 'AGENT'



What is the appropriate role for the IRO in relationship to working with change and transition?

What would be inappropriate and why?

How to T.R.A.I.N. my CEO/CFO ?



It is all about

- understanding what is really going on
- communicating and influencing directly and indirectly, (non-) directive the right way with the right message
- using the most powerful and transformational methods of interventions
- and doing it the smart way

T.R.A.I.N. my CEO/CFO S.Y.S.T.E.M™



- **TRANSFORM**
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- **S ...**
- **Y ...**
- **S ...**
- **T ...**
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Q&A

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