

SAMPLE SECTION

shift+
Shift Positive 360®

5 When Andrea is working at her very best, what is she doing? What are Andrea's strengths?

Andrea Ahrens

Last night for example – divided up clients with Joan. Financial presentations, had gone through the data, spent time with the numbers. Prepared, 2 hours early, dug into numbers, walked them through the numbers – now, future. I was moving and not behind a podium. "The first time I've understood this information."

Being able to know my stuff and help people understand it. Love both sitting and crunching numbers and figuring out strategy and also being able to help people figure out what it means and what to do. Also, sitting with a manager or leader try got figure out what they might try. Energized by people who want to learn and grow. "What if we did it this way?" Once you decide, who is doing what?

[Jim Jimson, Direct Report]

Identifying others strengths especially in a team setting. With St. Therese, she can really give energy to a team and have them work collaboratively together. A great gift! Her guidance and direction and experience.

Her strategic mind. I wish I had that – great out of the box ideas. The support she offers to people – she asks great questions, listening ear, closes all emails and calls and says, "what can I do for you today." Great aspect.

[Suz Suzman, Peer]

I love how she can go into a room of potential clients or strangers and really assess what they need. How she asks good questions to get at what they need. How she can take the answers and put into the assessment. "Here's what I hear that you need? What "we" can do for you?..." Puts it together. I love her as a person – she's honest and loyal. Hands down, that's why I chose to partner with her.

Honest, hardworking and loyal and that comes through with all of our clients and me. Beautiful job facilitating offsites for our clients. Culture and development of team. She really puts thought into the flow, the agenda, etc. Amazing job facilitating these offsites. PowerPoint, whiteboard, just asking questions.

[Joan Johnson, Direct Report]

Her understanding of the retail culture is exceptional and that leads to growth of DSS without soliciting clients. Her leadership capability in building and forming leaders. Her Strengths Finders sessions. Facilitating staff retreats and having tough conversations. Managing the high-level engagement – being encouraging. Having great conversations. 10 minutes looking at a chart of accounts and knowing where to go deeper.

The care in the DimCo team and generosity of her and Suz – very well received. It refills our cups. The tone is set by the leaders.

[Ahmad Ahmadman, Manager]

She really excels at seeing the big picture and setting the course. Does it without actually setting the course. She asks us the really hard questions and then probes deeper – what do you mean by that? To go beyond the cliché. To really narrow things down and forces us as physicians to define what we mean, need and want.

She is really good at staying the course. We go on tangents and she brings us back. Goal focused. She's in her element and oozes enthusiasm and that's contagious when in front of our staff and us.



Client: Andrea Ahrens
Coach: Pete Berridge
Shift Positive 360
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[Joe Joseph, Personal]

Facilitating a group. she is "on stage" she is excellent. A great presenter of information, really good at drawing people out and being involved in whatever the topic is. Techniques to engage people and connect them to the topic. Keenly aware of who needs to be drawn out and who needs to be connected.

Remembers everyone's name _ excellent in the one-on-one stuff too. Seen it in class. The eye contact, full attention. Maximizer, relator...clear about what she is not good about as well. She is already a great storyteller — tell us your story (rather than your elevator speech) 6 boxes of tissues brought along.



6 If Andrea were even more effective, what would she be doing? What is one small achievable step that she can take to move closer to that vision in the next few months? If applicable: If Andrea's team were more effective what would that look like?

Andrea Ahrens

Creating a priority of professional development to bring energy, learning, investing in that growth. Adding to her toolkit. Greater priority of overall health and wellness – eat, drink, sleep. Getting positive energy from yoga and bringing it all down – mindfulness. More speaking, facilitating, leading retreats. Breakout sessions. To do a keynote. Manage my calendar more in advance and being able to say “no.”

SMALL STEP

Small step – figure out a mastermind group to build accountability. In the meantime, reading FB group. Yoga group monthly? Stress management with my health and nutrition coach.

TEAM

Continue progress with workload – supported by the team structure – still need to build in some redundancies across DimCo. (with Joan).

[Jim Jimson, Direct Report]

Reaching out and helping more people – e.g., St. Therese a great operating team. There are others that can really use your expertise in this way. Also, continuing to focus on the bigger picture for DimCo and where we're going. We've developed the path as we go. Take the time to reflect where we've been (Suz and Andrea) and what is the next bend in the road that we'll take. Retail solutions side there is plenty of work, but finding the right people to be on the DimCo bus.

SMALL STEP

Small step – strategic direction (already doing) – continue to meet and discuss as a staff what is working and not and that helps paint the picture of where to go and what it will look like. Powerful things come from our all DimCo meetings.

TEAM

Team – encouraging us to lean on each other. We all have different strengths, e.g., I just called Joan this morning for an HR question and she asked me an accounting question. Doing that more with others – Kara, Katie, for example.

[Suz Suzman, Peer]

She does so well in groups and board meetings and offsites. She could excel even more, between those meetings (which are monthly or special times). She loves scalability. In the in-between times, she'd find joys in other areas that bring positivity when she is overwhelmed – maybe manage her “yesses” so she doesn't feel overwhelmed and drowning. In those times, her emails would start with “hi, how are you?” before her questions.

SMALL STEP

The tone in those stressful situations would show just a little nicety that is authentic to her. “Good morning,



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when you're in the office on Monday, could you check on this for me? Thank you." [more conditional language] (I need to be more direct). In person, our communication – making sure we are connecting with each other personally. So, managing the time to make sure we connect during the week whether for lunch – to have that human connectedness.

[Joan Johnson, Direct Report]

Getting the right team and ebb and flow. We're getting close with the team and realigning the tasks will help with the ebb and flow. Getting to implementing the ideas that will improve the longevity (away from the tactical day to day). Alignment of tasks.

SMALL STEP

Small step – we'd have Katie taking on some tactical things without needing to go onsite. Getting our larger vision of reviewing financials – Andrea to do that. Switching our clients according to Jim and my skills. Small step – the encouragement; "what is our timeline?"

TEAM

It would be throwing out all of the tasks by client and then reviewing them across all of the staff – who's best to do what? We've started weekly calls – Friday's. I'm coordinating it. Andrea would be checking back on this to measure progress and ask about obstacles. Sponsor it. Remain open to ideas that are different as well.

[Ahmad Ahmadman, Manager]

For Andrea to be able to hand off more of the mundane day to day that bogs her down. She is very detail oriented and can get into the minutia – the accounting functions. She'll take the work home with her and dig into the spreadsheets. If she had someone who could do that, she could stay on the big picture. She understands the details to do the strategies. She gets run down – BeCo. She shines in big picture and taking a group through the elephant in the room. That's a gift she has that very few have. She can confront the elephant in the room and make everyone feel good about it.

SMALL STEP

Small step – when we have the conversations, she takes notes for herself – "I'll do this..." Instead, it would be "I'll have Tara do this or Joan do this." With emails – she'd send them Monday during the day or they'd come from Joan.

[Joe Joseph, Personal]

When she is leading a topic on a conflict management, etc. her body Of knowledge is huge and she wants to share all Of it but only has 2 hours so. when she is selective about key activities or content. quotes, and paring it down to an enjoyable, absorbable amount Of information. it is more effective. Primarily it is about being more interactive that really helps. Less concern about sharing everything she knows and focusing on what is most meaningful.