



SOCIETY OF ACTUARIES

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## The EXCEL Model: Excellence in Teaching and Coaching

by Vincent J. Granieri

In the “good old days,” coaching employees meant telling them what to do and punishing them if something went wrong. Rumor has it that there are vestiges of this particularly autocratic managerial style remaining in some of our companies today. However, most modern managers understand that teaching is not telling and there are better ways to accomplish corporate goals. A concept of “servant leadership” has emerged, but what does that mean exactly? How does a manager serve his down line associates and still hold them accountable? As the pace quickens, the value of coaching rises and weaknesses in leadership are magnified.

While there is no cookbook approach or one-size-fits-all solution to teaching and coaching, there are several models that help a manager incorporate good habits into their daily routine. The EXCEL model is a straightforward, effective leadership tool. It has been used to improve relationships and performance both in individual situations and in group settings. The five steps of the EXCEL model are:

Engage—Building relationship

eXplore—Getting in touch

Communicate—Dynamic dialogue

Empower—Developing skills

Launch—Momentum and direction

EXCEL fits well with the servant leadership concept because it focuses the leader on the needs of his or her team and defines the leader’s success by the success of the team members.

### Engage

This is the foundation for every successful work day. Engage is the ability to successfully initiate communication with others. It occurs early in the work day and involves a positive affirmation of all members of your team. It could be a handshake or a greeting; something to let them know that they are a valued member of the team. Not only does this draw your team into a strong relationship, it sets an example of the kind of positive behavior that they should use with customers and other associates.

### Explore

If Engage is the foundation of the work day, eXplore is the foundation of the day’s work, *i.e.*, what needs to be accomplished. If the mantra of the servant leader is “I am successful when I help you to be successful,” this is the stage where the leader discovers the immediate needs and concerns of his/her team. To successfully eXplore, one must listen well, show concern and ask open-ended questions. Since our team members are our customers, we provide a secure and non-threatening environment so that they feel comfortable sharing their needs.

### Communication

In the Communication step, the rubber meets the road. This is where the leader’s mettle is tested. In establishing a dialogue, the leader must facilitate the discussion, but also establish



Vincent J. Granieri, FSA, MAAA, EA, is president with Integrated Advantage Consultants, Inc. in Cincinnati, Ohio. He can be reached at [Vince@integratedadvantage.com](mailto:Vince@integratedadvantage.com).

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How do we go about modifying the system to work for us as managers and not against us?

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a learning environment. Often, the team members are more receptive to learning if they understand the relevance of their assignments. It is the leader's responsibility to actively manage the process while being responsive and convincing.

### Empower

To Empower means giving someone the ability to do something. In this case, the leader provides team members with what they need in terms of ability and skills to perform the tasks they identified in the eXplore stage. In the Communication stage, team members learn skills that they practice and apply in the Empowerment stage. The leader provides encouragement and support in a no-risk environment. The best leaders are able to look beyond the present and project a team member's skills into the future as they take personal responsibility to bring about the transformation. In the end, team members have the ability and the accountability to perform their current responsibilities.

### Launch

As the word suggests, Launch involves force and momentum. Every interaction, meeting and work day should end with a positive push along the path of success. With respect to the accountability issue, this is where accountability is set. The leader summarizes the relevant ideas and events and gets commitment from the team members to use the skills or information they learned to meet the needs that were identified in the eXplore stage. The best leaders passionately motivate the team to meet and exceed

their objectives at this point. Contrast this to the typical business meeting, which ends abruptly and leaves the team wondering what just happened and what to do.

Like acquiring any new skill, learning the EXCEL model will take time and effort on the leader's part. The effort pays off in the form of high performing teams that then are able to coach and teach others. Although we focused most of our attention in this article on what to do, leadership also involves who a leader is—the personality traits that either foster or discourage a secure, effective learning environment. By learning the EXCEL model, a leader signals that personal growth is for everyone, by using it, he/she is teaching it to the team. □

