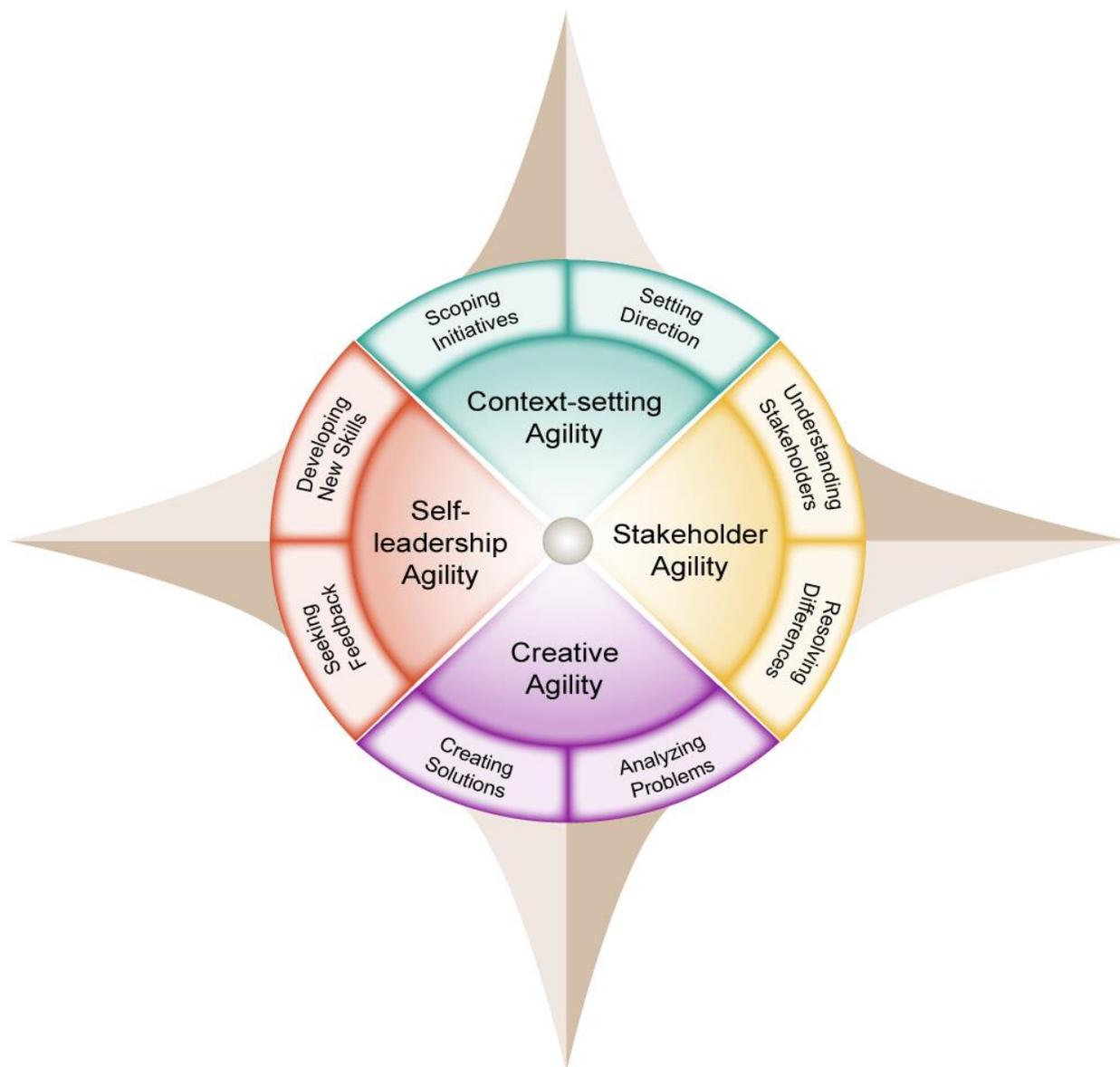


Workbook for Pre-Work and Group Session: “Diagnosing Agility Levels”



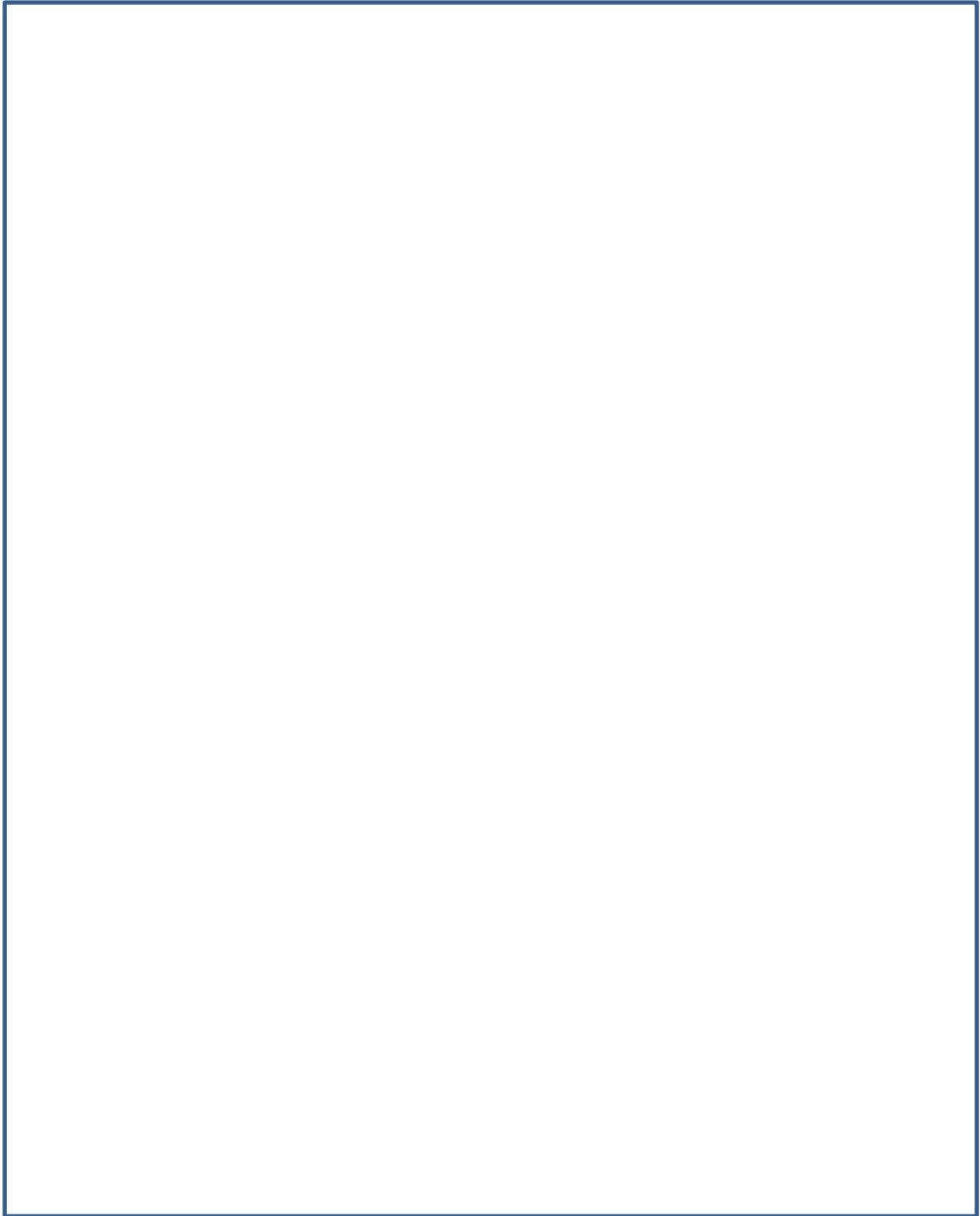
August 18

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ChangeWise

Leadership Agility Framework

On this page, while watching this mini-webinar, **take notes and write insights and questions** that you have about the framework – for discussion in the first group session.



Leadership Agility: From Expert to Catalyst

Each agility level *includes and goes beyond* the capacities and skills developed at previous levels. Percentages refer to research-based estimates of the capacity to operate at each agility level. (From *Leadership Agility*, pp. 8-9)

Level of Agility	Assumptions about Leadership	Leading Organizational Change	Leading Teams	Pivotal Conversations
Expert	<p><i>Tactical, problem-solving orientation.</i></p> <p>Believes that leaders are respected and followed by others because of their authority and expertise.</p>	<p>Organizational initiatives focus primarily on incremental improvements inside unit boundaries with little attention to stakeholders.</p>	<p>More of a supervisor than a manager. Creates a group of individuals rather than a team. Work with direct reports is primarily one-on-one. Too caught up in the details of own work to lead in a strategic manner.</p>	<p>Style is either to strongly assert opinions or hold back to accommodate others. May swing from one style to the other, particularly for different relationships. Tends to avoid giving or requesting feedback.</p>
Achiever	<p><i>Strategic, outcome orientation.</i></p> <p>Believes leaders motivate others by making it challenging and satisfying to contribute to larger objectives.</p>	<p>Organizational initiatives include analysis of external environment. Strategies to gain stakeholder buy-in range from one-way communication to soliciting input.</p>	<p>Operates like a full-fledged manager. Meetings to discuss important strategic or organizational issues are often orchestrated to gain buy-in to own views.</p>	<p>Primarily assertive or accommodative with some ability to compensate with the less preferred style. Will accept or even initiate feedback, if helpful in achieving desired outcomes.</p>
Catalyst	<p><i>Visionary, facilitative orientation.</i></p> <p>Believes leaders articulate an innovative, inspiring vision and bring together the right people to transform the vision into reality. Leaders empower others and actively facilitate their development.</p>	<p>Organizational initiatives often include development of a culture that promotes teamwork, participation, and empowerment. Pro-active engagement with diverse stakeholders reflects a belief that input increases the quality of decisions, not just buy-in.</p>	<p>Intent upon creating a highly participative team. Acts as a team leader and facilitator. Models and seeks open exchange of views on difficult issues. Empowers direct reports. Uses team development as a vehicle for leadership development.</p>	<p>Adept at balancing assertive and accommodative styles as needed in particular situations. Likely to articulate and question underlying assumptions. Genuinely interested in learning from diverse viewpoints. Proactive in seeking and utilizing feedback.</p>

Leader Profile: Rachel

After Rachel completed her MBA, she held a series of marketing positions in financial service firms. During that time, she developed a talent for identifying high-value customer segments and finding ways to use company capabilities to attract and retain them.

At that point, the senior VP of Strategy and Marketing at a brokerage firm brought Rachel into his company to head a team tasked with analyzing the company's customer base and recommending ways to improve its business model. Rachel began by focusing on the firm's Fixed Income group. [If you're not familiar, "fixed income" is a **class of assets and securities that pay out a set level of cash flows to investors**, typically in the form of fixed interest or dividends].

Considered the firm's weakest contributor, Fixed Income had low profit margins, and it constituted only a small percentage of the company's business. The group initially resisted the project, because they feared Rachel would highlight their perceived inadequacies. But she explained that she'd already done an initial analysis, which suggested that Fixed Income's potential value to the company was currently underrated. She stressed that her aim was to gain a better understanding of their customers' full potential value to the firm.

As it turned out, when Fixed Income's customers were compared with those of the firm's other investment groups, Rachel's hypothesis was confirmed. Almost everyone who invested with the Fixed Income group did all their stock and mutual fund investing with the firm, whereas those who invested only with the company's stock and mutual fund groups also invested large percentages of their portfolios outside the firm. Further, when customers withdrew their fixed income investments, they pulled all their other investments with the firm. Yet the current business model subjected this customer segment to long wait times, and the employees to whom they spoke lacked the level of expertise found in other investment areas. When Fixed Income customers left the firm, poor service was the primary reason, and they rarely came back.

Rachel had no formal authority over the group. So she involved Fixed Income employees in a series of meetings, where they collaborated in developing a strategy for growing and retaining this valuable customer segment. The result was that Fixed Income customers now enjoyed a new level of service that included ready access to people with high levels of expertise. The team was also able to leverage existing company capabilities to create more innovative services. For example, they discovered that the firm already had a good deal of information, which, properly packaged, could help Fixed Income customers.

Reflecting on this and other projects she spearheaded at the brokerage firm, Rachel described what leadership means to her: “For me, leadership doesn’t necessarily mean being in a formal leadership role. It can be leading the thought effort for something that truly makes a difference for an organization or for a company as a whole. I think leadership has a lot to do with personal qualities that allow you to inspire, excite, and challenge yourself and others to improve results in interesting and challenging ways. What gets me going is the newness, the interesting, the pushing. That’s what’s fun for me. And when others see I’m having fun, it can inspire them to take on things that interest them and that challenge them to do things they didn’t think they could do. With the Fixed Income project, I was very gratified to see people get excited about a new, more powerful vision for their business—going from just selling a product to growing a market for the firm as a whole.”

Leader Profile: Ethan

Ethan was the CEO of a small software company he had founded some years ago along with his college roommate, James, who was now the company's CTO. Largely because the marketplace loved their products, they'd been able to bootstrap the company during the 8 years since its founding.

When Ethan first started working with a leadership coach and did the Leadership Agility 360, he had just led his executive team through a visioning exercise for the company. This ultimately successful exercise was difficult, because his co-founder, James, had a strong command-and-control orientation, whereas Ethan wanted employees to feel engaged and bought-in to the company's direction. Ethan had many long conversations with James, listening intently, taking in James' ongoing criticism, and trying to address and accommodate James' concerns without abandoning his own vision for the company. During this period, James continually interrupted executive team meetings, including the visioning exercise, trotting out his ongoing complaints and disrupting progress. Finally, Ethan and James agreed it would be better to continue the visioning exercise without James' participation. (Within six months after this exercise was completed, James had left and sold his shares to Ethan).

Meanwhile, Ethan gained the following insights from his 360 feedback:

- He was viewed as having brilliant ideas for new products.
- Although he believed in getting feedback on his own ideas, he tended to involve others in his thinking only when he was either totally undecided or fully decided, which made it hard for others to engage. Going forward, he wanted to involve others more fully in his thinking, especially on complex or interdepartmental issues.
- At the same time, Ethan tended to hold back in advocating his own views in situation where he felt it could lead to interpersonal tension. (His conversations with James are just one example). He later acknowledged that he'd "had something of a blind spot about the extent to which James' behavior had hurt morale in the company."
- Having everyone fully bought-in to key decisions was very important to Ethan. Some executive team meetings could drag on quite a bit as he tried to come to unanimous decisions.
- Although he was well-respected and pretty well-liked throughout his small company, he wanted to connect with people more fully on an emotional level. This meant becoming a more compelling speaker and becoming more sensitive to his and others' energies in pivotal conversations.