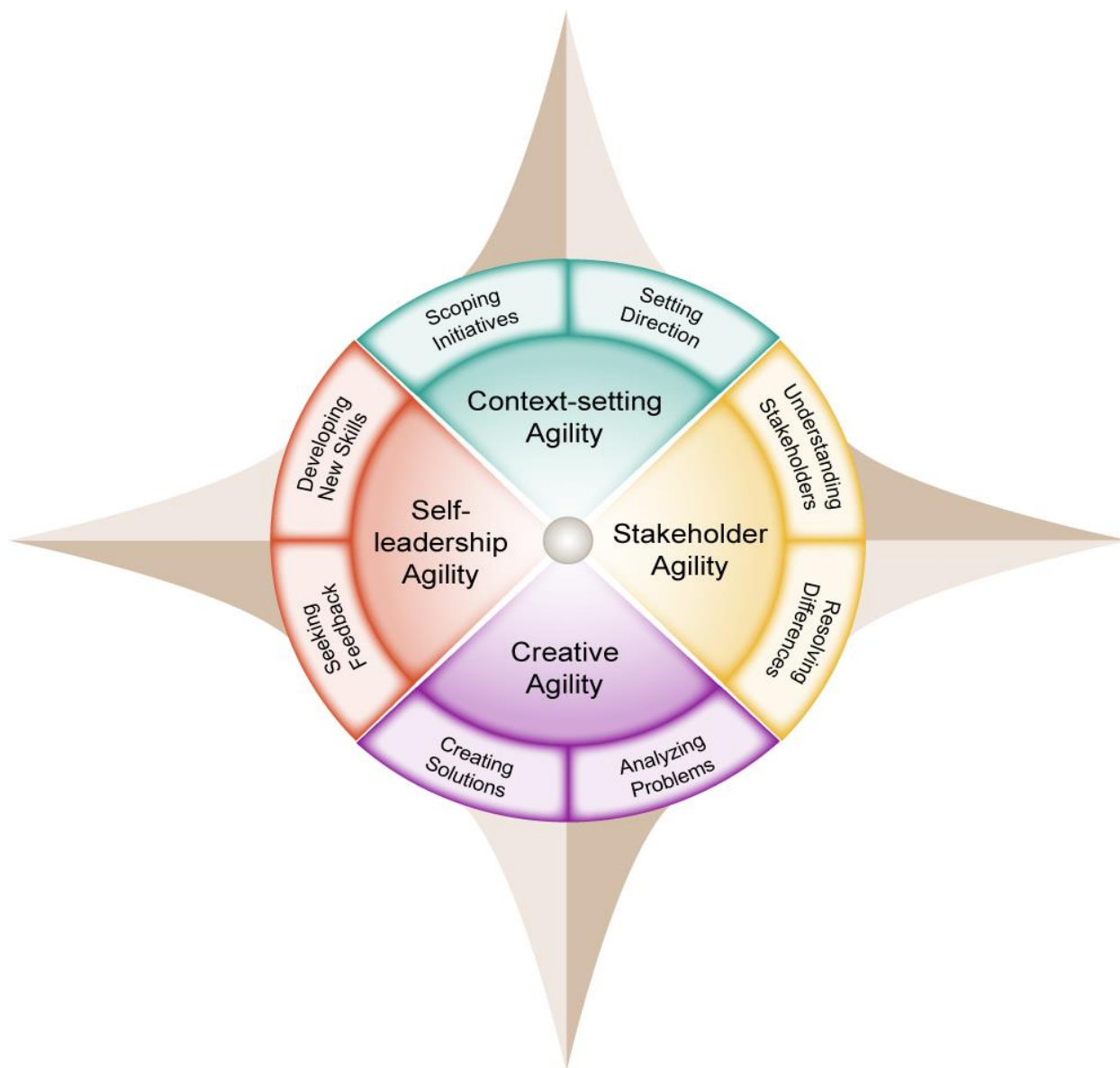


Workbook for Pre-Work and Group Session: “Levels of Reflective Action”



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ChangeWise

Levels of Reflective Action

On this page, while watching this mini-webinar, **take notes and write your insights and questions** for discussion in the second group session.

Reflection Questions on Mini-Webinar

Now that you've taken in the mini-webinar on Levels of Reflective Action, please answer the following reflection questions below.

Describe, in your own words, the role a leader's level of reflective action plays in enabling development into a new stage and agility level?

Describe, in your own words, how a leader's level of reflective action broadens and deepens as they move from Expert to Achiever, and then from Achiever to Catalyst?

Levels of Reflective Action

	Level of Awareness	Level of Intent
Expert	Modest reflective capacity Focuses on one problem, person, function, etc. at a time	To solve problems and make incremental improvements

Achiever	Robust reflective capacity (making connections, seeing relationships) Can see teams, organizations, industries as systems	To achieve desired outcomes for valued institutions
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Catalyst	Able to “reflect in the moment” Can see and appreciate the “human system” underlying business and organizational systems	To create satisfying human contexts that enable sustained achievement of desired outcomes
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Ways to Foster Achiever Reflective Action



Coaching Scenario: Guy

Guy was Director of Customer Service for a semiconductor company. He managed an on-site call center with about eighty employees and reported to the VP of Quality and Customer Service. A seasoned professional, he knew the call center backwards and forwards. He was a go-to person who'd gained great respect for efficient, high-quality work. If his boss told him he needed a new type of analysis done on his center's performance, by the next day, he'd stay up late to complete it. The next evening, she'd call him at home and say she needed the data sliced another way, by tomorrow. Guy always delivered. He enjoyed being seen as competent, knowledgeable, and efficient, able to handling any demand. Whenever he felt he wasn't living up to these standards, he judged himself harshly.

Then seemingly out of nowhere, Guy was promoted to a new position. He would be responsible for implementing a "knowledge capture" strategy developed by top executives. The intent of the strategy was to collect the know-how generated in product development efforts so that future products and customized work could be produced more efficiently. Guy and his new team of direct reports were responsible not only for organizing product development knowledge and making it readily accessible but also for obtaining it from product managers.

Once Guy had thought through his basic approach, he invited the senior product managers to a meeting to launch the initiative. To his great disappointment, they responded with skeptical questions and critical comments. Taken aback by the strength of their reactions, he felt he was facing an impenetrable wall of resistance. He finally invoked top management's mandate and essentially ordered them to comply. The pronouncement was met with stony silence. No one even looked at him as they filed out of the room.

When Guy tried to follow up, many of his calls and e-mails simply weren't returned. Those who did respond treated him like a presumptuous nuisance. He was extremely discouraged. He'd turned his prospective partners into enemies virtually overnight. It looked like the whole initiative might collapse before it even started. Guy had initially hesitated to take the new job, afraid he didn't have the leadership skills needed to influence people over whom he had no direct authority. But the hiring VP had encouraged him, saying that if Guy ran into difficulty, he could use a leadership coach the VP had used himself to good effect.

Now that his worst fears had materialized, Guy decided he'd better meet this coach. They quickly decided to have an accelerated series of coaching sessions. They clarified his current leadership challenges, identified his present level of agility (Expert), and created an action plan for coaching. Guy discovered that, although he had always been accommodative toward his direct managers, his power style with peers and subordinates was highly assertive.

Early on, they focused on the pressing matter of his relationship with the product managers. Clearly, he needed to find a new way to engage with them to try to salvage the project. His coach saw this as an opportunity to help Guy form better relationships so he could succeed in his project. But he also saw it as an opportunity to help Guy develop toward the Achiever level, especially in the areas of context-setting and stakeholder agility, including both stakeholder agility and power style.

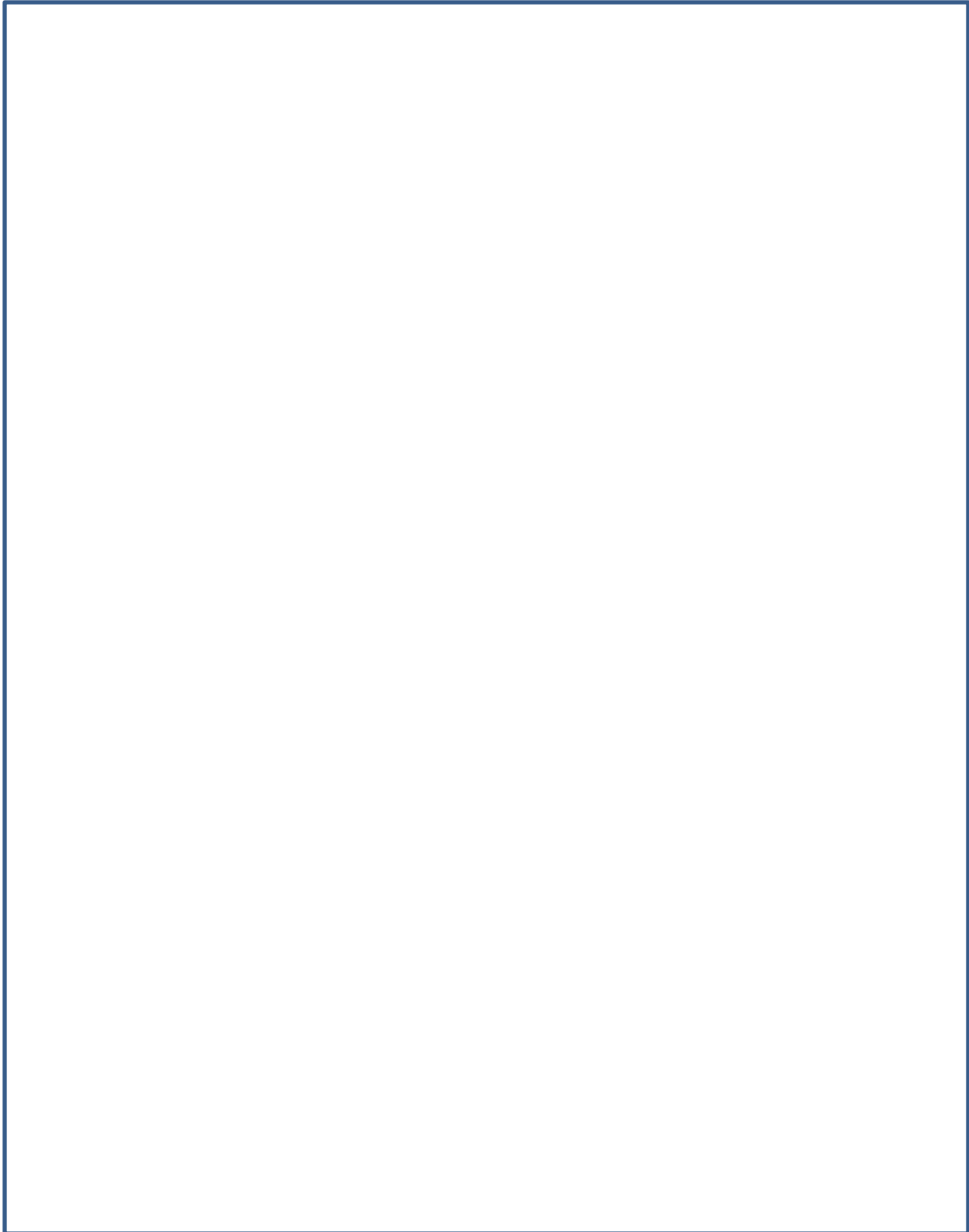
[See reflection questions on the next page ...]

Reflection Questions

Imagine that you are Guy's coach. Review the charts on pages 7 and 10 of the **mini-webinar transcript**, which capture the shifts from Expert to Achiever for Context-Setting and Stakeholder Agility. Please answer these two questions in the space below:

- In general, how could you use this information to coach Guy?
- What are some specific questions you could ask or suggestions you could make that might help him move into the Achiever realm while repairing the broken relationship?

Ways to Foster Catalyst Reflective Action



Coaching Scenario: Adam

Adam had recently been promoted to VP of Central Services for a communications company headquartered in Chicago. His organization numbered several hundred people. Forty years old, he was a bright, competent manager who consistently exuded a natural enthusiasm, even though the company was going through rough times. As part of its comeback strategy, the company invested in a leadership development program for high-potential managers, including Adam. He received 360-degree feedback and was able to select a leadership coach.

A fully developed Achiever, Adam was a classic heroic leader. He often got input from his team, at least its relevant members, when making decisions. But he was realizing that this approach held him back from being the leader he wanted to be. As soon as he learned about the Catalyst level of leadership agility, he knew it was the next step in his development. He wanted to build a participative team, take more time to develop his direct reports, and create a compelling vision for his organization. Adam was also drawn to the Catalyst level because he wanted to experience a deeper sense of meaning in his life and work.

Adam had a real thirst for self-discovery and personal and professional growth. He was always coming to his coaching sessions with new insights about himself and things he wanted to work on. At one point he began talking about how he dealt with performance issues. He felt he did a good job with these often-uncomfortable conversations, as long as the other person was a man. But he found it extremely hard to give negative feedback to women. "I wind up being too nice and just avoiding the issue," he said. "In fact," he said, "I have a situation like this that I'm (not) dealing with right now."

Asked why he thought he held back, Adam said he was afraid he would make her cry. Asked how he'd feel if she did begin to cry, he said he'd feel deep pangs of guilt. Free associating a bit, he said he had a similar problem with his six-year-old daughter. His wife complained that he allowed his daughter's whining to manipulate him into letting her do things that she really shouldn't, like staying up too late.

Adam's coach wanted to help him become equally effective in discussing performance issues with men and women. And, as with the other issues he and Adam were working on, his coach wanted to do so in a way that helped Adam activate Catalyst-level reflective action, which involves "reflecting in the moment."

Reflection Questions

- Imagine that you are Adam's coach. Please use space below and on the next page to respond to this question: What are some specific questions you could ask and/or "homework" suggestions you could make that might help Adam move into the Catalyst realm while expanding his ability to have effective performance-related discussions?

