

Joe's Case Stakeholder Agility – Achiever to Catalyst

Title slide:



This is the first of two mini-webinars on how to help a leader shift from Achiever to Catalyst in the area of Stakeholder Agility.

As with the mini-webinars on Achiever to Catalyst Stakeholder Agility, the purpose of the first mini-webinar is to use a case study to walk you through how you can align a client's coaching agenda, or what we call their action plan, with the Leadership Agility model, resulting in deeper insights about how to help a leader make this shift. The second webinar is about the same case, but focuses on what the coaching process itself was like.

As before, strongly recommend that you take notes as you listen. You will also find a written version of these mini-webinars in the online Library for the program, and you can bring these with you to the group session.

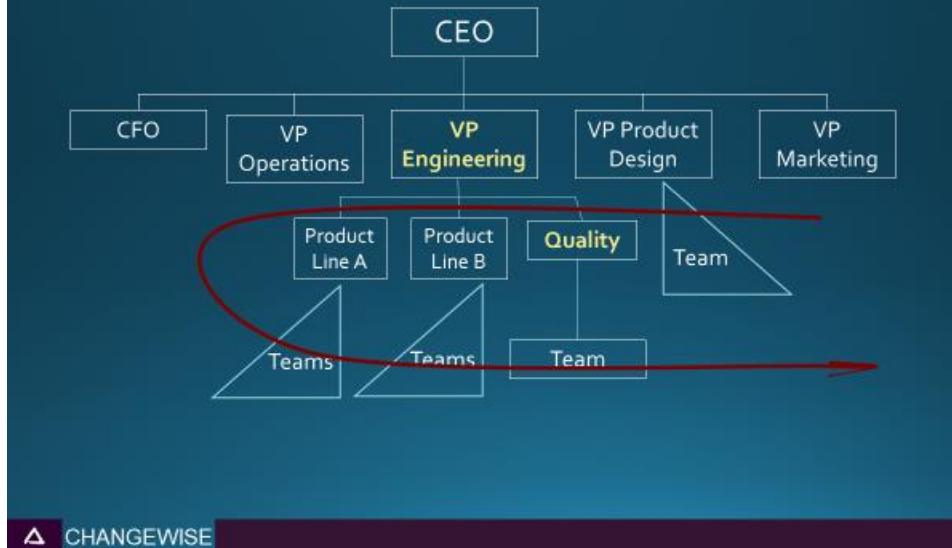
Joe's Role



We're going to call the client in this case study Joe. Joe was the VP of Engineering in a small software company. Joe had three direct reports. His peers were the other members of the executive team.

Joe had worked his way up from software team lead to Product Line Manager and then to his current position. Later he was given the title of CTO with additional responsibility for Product Design.

The Product Development Process



You'll probably remember from Dale's case, at this time, the product development flow worked like this: New product ideas were generated by Product Design, using input from Marketing. Design specs were then given to the Engineering teams who created the products.

Joe's boss, the CEO, was Ethan, whose profile we looked at in our earlier session on diagnosing levels of Leadership Agility. Whereas, Ethan was an Achiever with strong accommodative tendencies, Joe was an assertive Achiever.



The slide features a dark blue background. At the top, the name 'Joe' is written in a large, white, sans-serif font. Below the name is a portrait of a man with dark hair, wearing a dark suit jacket over a light-colored checkered shirt. To the right of the portrait is a bulleted list of characteristics. At the bottom left of the slide is the 'CHANGEWISE' logo, and at the bottom right is the website address 'www.changewise.biz'.

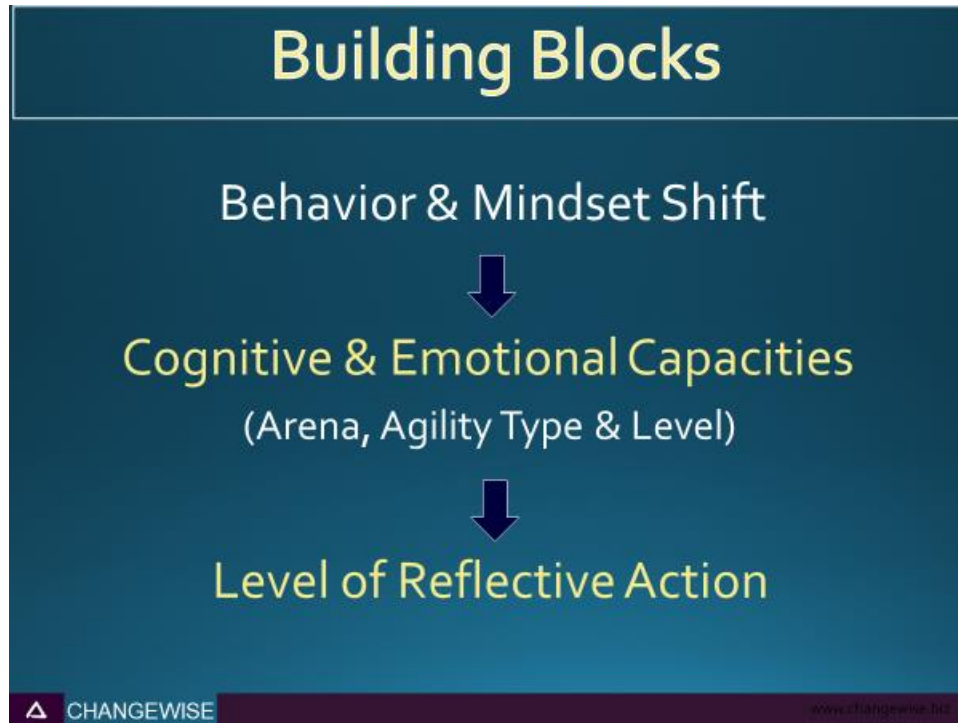
Joe

- Late 30s
- Very smart
- Likable with some rough edges when under stress
- Very open to learning:
 - Growth mindset, wanted coaching
 - On cusp of Achiever to Catalyst transition

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A few things about Joe as a person:

- He was in his late 30s.
- He was very smart.
- He was also very likeable, though he did have some rough edges that showed up when he was under stress.
- And he was open to learning. Ethan, the CEO had done a Leadership Agility 360 with me and had encouraged his VPs to do the same. Joe jumped at the opportunity.
- This was partly because he faced some huge leadership challenges, but he also had a growth mindset and was, as it turned out, on the cusp of the Achiever-Catalyst transition.



We talked about the building blocks for starting Leadership Agility Coaching with a client when we discussed Dale's case. Here's a brief refresher:

- First, a coaching action plan. Either from the Leadership Agility 360, the Leadership Agility Accelerator, or a coaching agenda you've built with your client. In Joe's case, I'm going to use one of the action plans that came out of his 360 feedback.
- Second, we'll see in a minute that the particular action plan I've chosen for this case was focused on Stakeholder Agility in the arena of Pivotal Conversations.
- Third, from his action plan and my own diagnostic assessment of the type we discussed in an earlier session, he appeared to be at the transition from Achiever to Catalyst. That was my hypothesis going in and, in my assessment, it proved to be true.
- Finally, to support his movement from Achiever to Catalyst, I would also look for opportunities to help him activate Catalyst awareness and intent while putting these plans into action.
- I'll now go through these building blocks in Joe's case in a bit more detail.

Joe's Action Plan

Behavior	
From...	To...
I jump right in and start arguing the merits of my viewpoint vs. theirs, without stepping back to really understand their views and what is behind their opinions	Actively explore the other's position and what is behind it. Be receptive, see what I think, and state my own view
Mindset	
From...	To...
Target Situations	
Reminders	

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Let's start with Joe's action plan. For those of you who are familiar with the Leadership Agility 360 and the Leadership Agility Accelerator, this is the action plan template that comes with these tools.

The new, more agile behavior to which Joe aspired was to "Actively explore the other's position **and** what is behind it. Be receptive, see what I think, and state my own view."

When asked, essentially, what are you doing now instead of that, he said: "I jump right in and start arguing the merits of my viewpoint vs. theirs, without stepping back to really understand their views and what is behind their opinions."

That is, he did typically ask questions to try to understand the other person's point of view, but in his most challenging conversations, he had some room for improvement, even at the Achiever level. He realized that, if his anger got triggered, he stopped listening, and his questions became attempts to nail the other person, rather than really understand them on their own terms.

But his aspiration was to be able to shift into the Catalyst level, even under stress. He wanted to go beyond hearing the other person's position to **exploring** it, going to a new level of empathy, and being receptive – yet without losing his ability to assert his own views. This is a key point, because it challenged him to work not only on his stakeholder understanding, but also his power style, which we'll explore more fully in a few minutes.

Joe's Action Plan

Behavior	
From...	To...
I jump right in and start arguing the merits of my viewpoint vs. theirs, without stepping back to find out what objectives they have — what is behind their opinions	Actively explore the other's position and what is behind it. Be receptive, see what I think, and state my own views
Mindset	
From...	To...
If I let up on pressing my viewpoint, I'll likely be dismissed or steamrolled by the other person	I can understand without necessarily agreeing. Understanding others may make them more receptive to me
Target Situations	
Reminders	

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Joe's action plan also identified the specific mind-set shift that would best support him in growing into the behavior to which he aspired. As a result of some coaching questions, he realized that there was a mindset or attitude behind his current behavior that had been an unconscious fear: "If I let up on pressing my viewpoint, I'll likely be dismissed or steamrolled by the other person." As this mindset became more and more conscious, it loosened its hold on him.

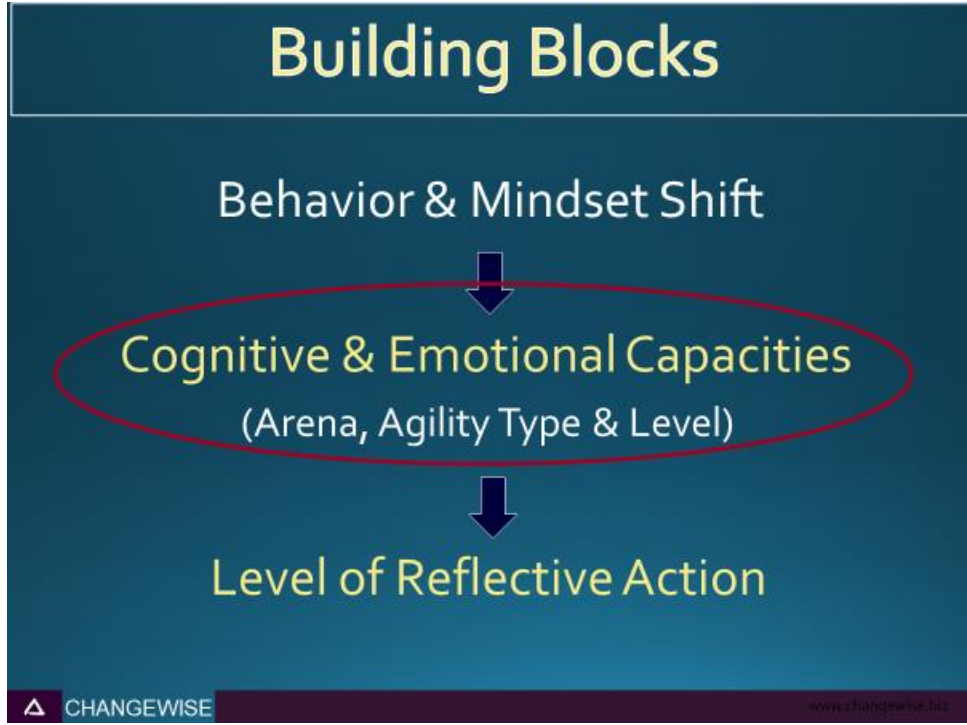
Reflecting on the mindset that would best support him in actively exploring others' views, he gained the insight that understanding the other person did not force him to agree with them regardless of what he thought. It was simply a step in a constructive dialog. He also realized that one possible benefit of more fully understanding others could be that, at least at times, they would be more inclined to try to understand his views.

Joe's Action Plan

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I jump right in and start arguing the merits of my viewpoint vs. theirs, without stepping back to really understand their views and what is behind their opinions	Actively explore the other's position and what is behind it. Be receptive, see what I think, and state my own views.
Mindset	
From...	To...
If I let up on pressing my viewpoint, I'll likely be dismissed or steamrolled by the other person	I can understand without necessarily agreeing. Understanding others may make them more receptive to me
Target Situations	
One-on-one meetings with peers to discuss issues across departments.	
Reminders	
Put note in calendar next to these meetings.	

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Finally, Joe said his primary opportunities to practice the new mindset and behavior were in one-on-one meetings with peers where cross-functional issues needed to be addressed. To help him remember to practice, he reviewed upcoming meetings at the beginning of the week and made a note in his calendar next to those that had high likelihood of being practice opportunities.



Now we'll move to the second building-block: Cognitive and emotional capacities. We can pinpoint these by looking at the relevant action arena, type of agility, and level of agility.

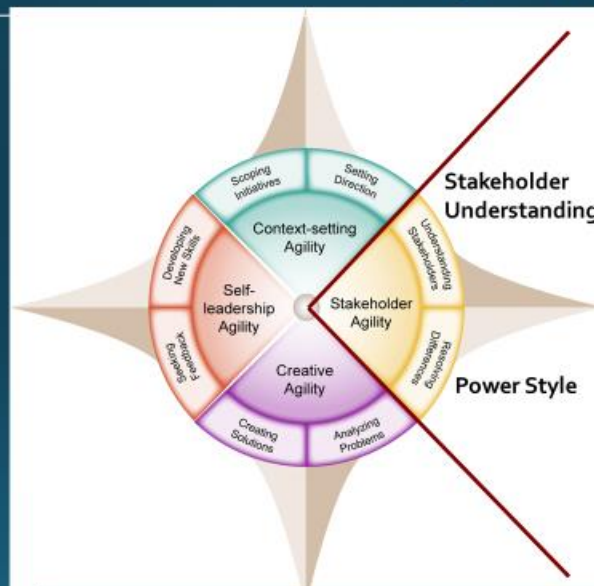
Action Arena & Type of Agility

	Leading Change	Leading Teams	Pivotal Conversations
Context-Setting Agility			
Stakeholder Agility			
Creative Agility			
Self-Leadership Agility			

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First, we can use this grid to pinpoint Stakeholder Agility in the arena of Pivotal Conversations.

Stakeholder Agility



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In looking more closely at Stakeholder Agility on the Leadership Agility Compass, we see that it has two aspects: Stakeholder Awareness and Power Style. Let's look at both of these in more detail.

Stakeholder Understanding: Achiever to Catalyst

	Achiever	Catalyst
Knowledge (cognitive)	<ul style="list-style-type: none"> Find out their views Take them into account 	Understand who they are, their goals, and the pressures they face
Empathy (emotional)	Put myself in their shoes	Feel what it's like to be them in their shoes

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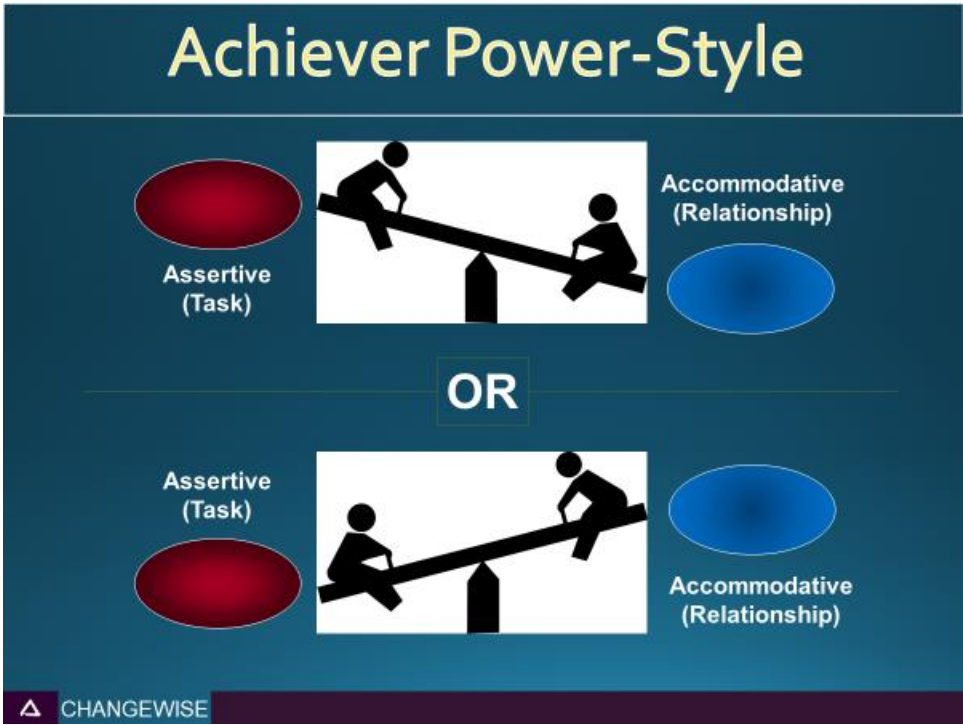
When we look at the Achiever to Catalyst transition for Stakeholder Agility in Pivotal Conversations, here's what we see:

Stakeholder understanding has two dimensions: Cognitive and emotional. The cognitive dimension is gaining knowledge of the other people and, potentially, the situation in which they find themselves. The emotional dimension is empathy. But Achievers and Catalysts can access different levels of knowledge and empathy.

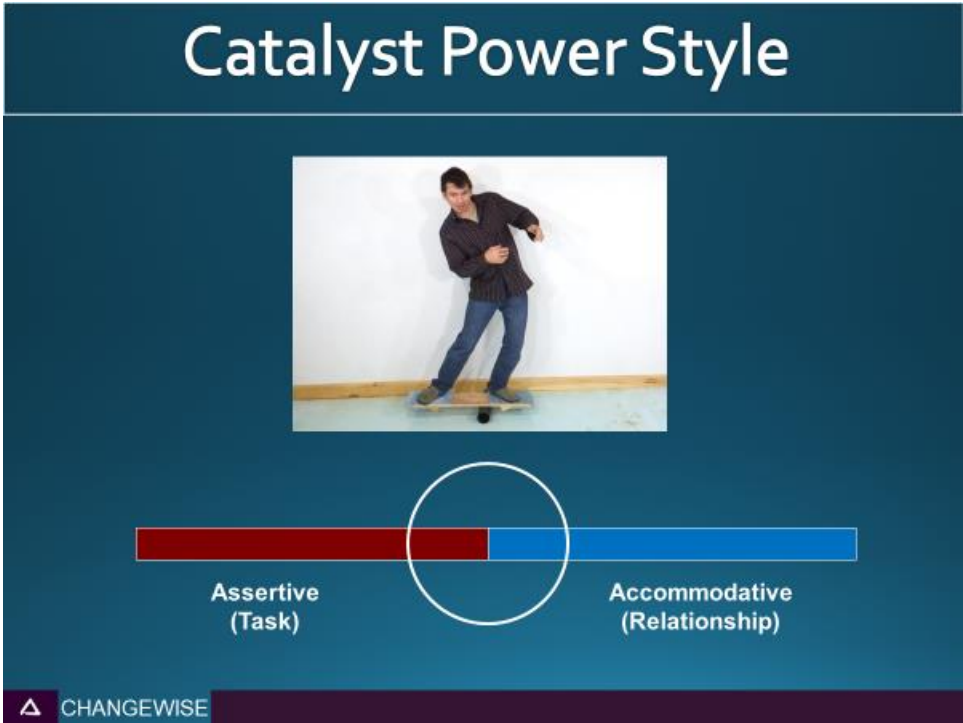
For Achievers, knowledge of stakeholders is about finding out their views and taking them into account. Catalysts go beyond this, because they want deeper knowledge: Who is this stakeholder as a person? How do their goals and the pressures they are currently under influence their views?

For Achievers, empathy is about putting yourself in others' shoes. But there's a limitation to this kind of empathy. It implies that the other person probably feels just as you would, if you were in their situation. Catalysts go beyond this by using their deeper knowledge of the other person to feel what it is uniquely like for the other person to be in the situation they're currently in.

These are what the Leadership Agility model calls the cognitive and emotional capacities that evolve as a leader moves from Achiever to Catalyst. They are akin to the mindsets captured in Joe's action plan. The only difference is that the mindset shift in his action plan is something that comes from him, in his own words. As his coach, I wanted to also hold these more generic cognitive and emotional capacities in mind, so I could help him activate these along with the specific mindset he had identified.



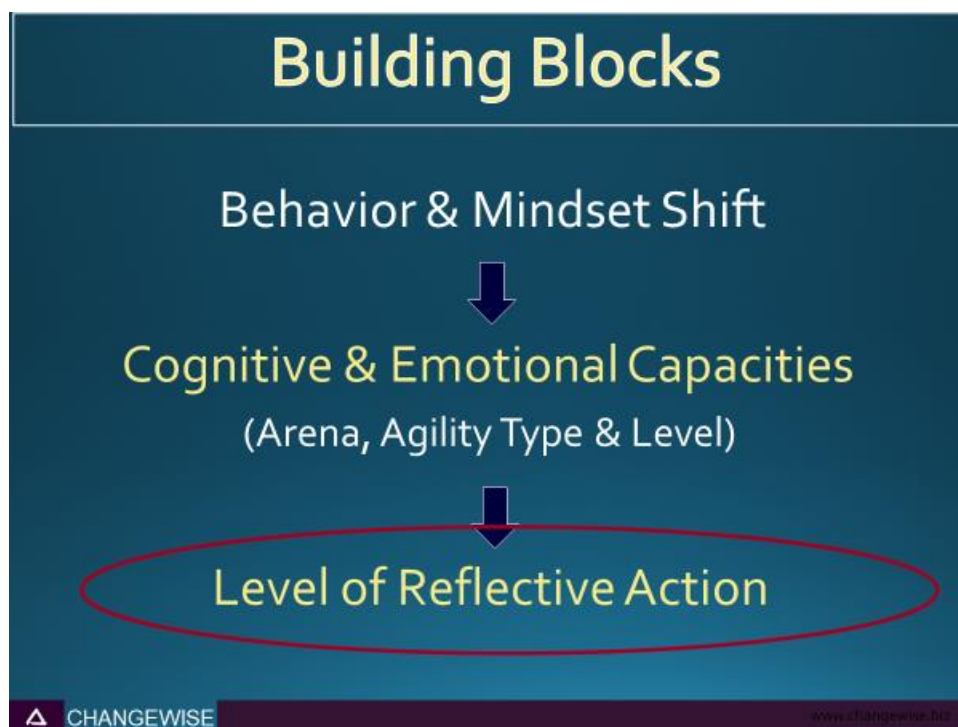
As I've mentioned, to help a leader take their Stakeholder Agility to a new level, you need to work with them on Power Style as well as Stakeholder Understanding. An Achiever power style is more balanced than that of an Expert, but it still tends to emphasize one of these basic desires over the other, while compensating to some extent with the other impulse. This is what the see-saw figures on the slide represent. In Joe's case, we can see from his action plan that his starting point is that of a primarily Assertive Achiever. In pivotal conversations, he does ask questions to understand others' views and he is concerned about maintaining constructive relationships. But, especially under stress, it's his Assertive side that tends to dominate.



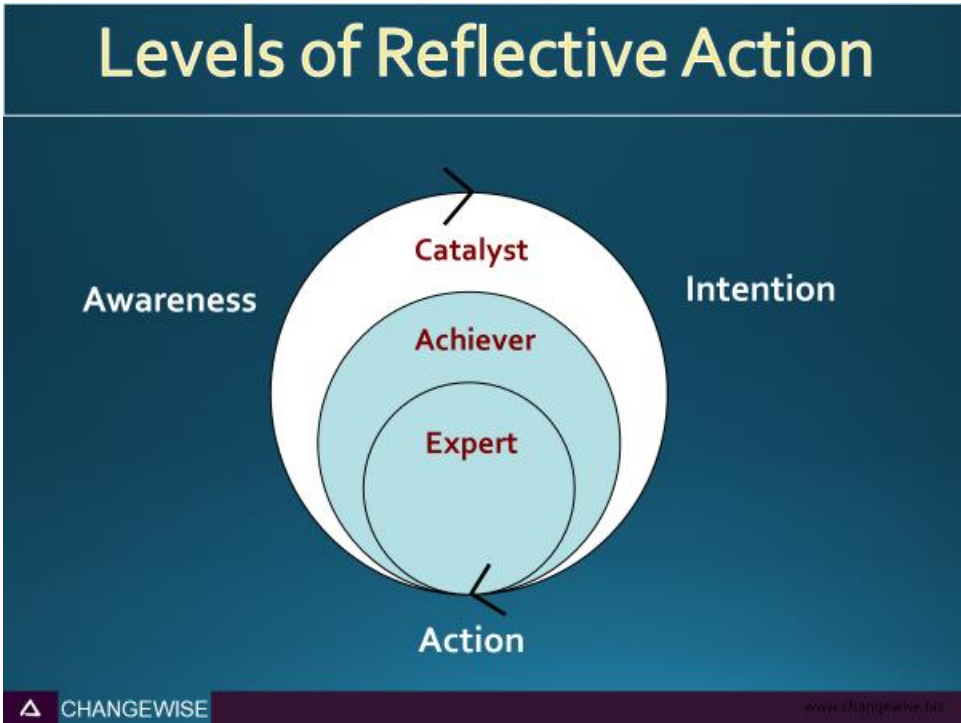
In this slide, which captures the Catalyst Power Style, the image of a see-saw is replaced by a balance board. This image and the graphic underneath represent several things about this power style. First, rather than having the habit of emphasizing assertiveness over accommodation, or vice versa, the Catalyst is equally adept at being assertive or receptive.

The circle in the middle of the graphic represents the fact that the Catalyst is very centered between assertiveness and receptivity, making them very agile, in the sense of being able to move back and forth between the two with some ease. The red and blue bars represent the fact that a Catalyst can also be highly assertive or highly receptive, if the situation calls for it.

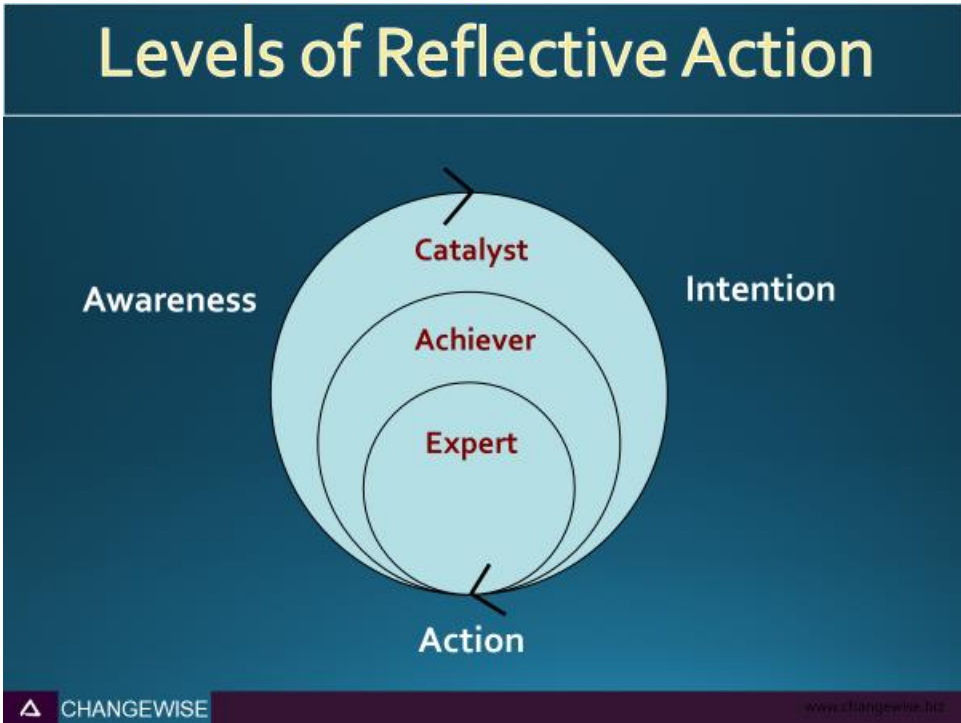
How this connects with Joe's action plan is that he wants not only to be a much more active and receptive listener, he also wants to combine this ability with constructively stating his own views. The combination of self-expression and deep listening is what enables the Catalyst to generate collaborative pivotal conversations.



Finally, we come to the last building block, the shift in level of awareness and intent that would help make possible Joe's movement from Achiever to Catalyst Stakeholder Agility.



“Levels of reflective action” is another way of saying “levels of awareness and intent,” since reflective action is a cyclical process that moves from intent to action to reflection. In Joe’s case, we want to help him expand his underlying awareness and his underlying intent to include the Catalyst level, like so:



Levels of Awareness and Intent

	Achiever	Catalyst
Intent	To achieve desired outcomes for valued institutions	To create satisfying human contexts that enable sustained achievement of desired outcomes
Awareness	Robust reflective capacity – making connections, seeing relationships Sees teams, organizations, and industries as systems	Also able to “reflect in the moment” Can see and appreciate the “human system” underlying business and organizational systems

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As we break out the awareness and intent aspects, we see that the shift from Achiever to Catalyst intent moves beyond an intent to “achieve desired outcomes for valued institutions.” Catalysts build on and expand this intent, which becomes “to create satisfying human contexts that enable sustained achievement of desired outcomes.”

Since the arena Joe’s action plan focuses on is pivotal conversations, the phrase “human contexts” means “working relationships.” It means that, especially with his fellow executive team members, as well as more broadly, he’s interested not just in making particular interactions better and not just for the sake of, say, getting quality products out on time and on budget, but also in **developing sustainable collaborative relationships** that would contribute to a more collaborative culture.

Developing Catalyst level awareness is about learning to reflect in the moment, which involves catching things about yourself of which you were previously unaware. This could include feelings, assumptions, and behaviors, positive or negative. Catalyst awareness also involves awareness of the systems around you as human systems, which includes organizational culture, team culture, and working relationships.

Summary: Building Blocks

Building Blocks	Points of Focus
Behavior change	<ul style="list-style-type: none">Actively explore other views, be receptive, state own views
Mindset shift	<ul style="list-style-type: none">Understand isn't agreement. Can increase other's receptivity
Cognitive & emotional capacities	<ul style="list-style-type: none">What's it like to be them with their goals and pressures?Balanced power style
Level of awareness & intent	<ul style="list-style-type: none">Reflection in-the-moment & awareness of human systemsCreate satisfying human contexts that enable sustained achievement

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To summarize, when I first reviewed Joe's action plan and prepared for our coaching relationship, I went over what I've just been over for you, so that I could draw on the Leadership Agility framework amid specific conversations he wanted to prepare for and reflect upon.

- Behavior and mindset shift from his action plan: The new behavior was to actively explore other views and be receptive, while also stating his own views. The mindset shift to support that was the insight that understanding others didn't force him to agree with them and might even influence them to be more receptive in listening to him.
- Cognitive & emotional capacities: Looking at the particular arena, agility type and level of agility implied in his action plan, the two cognitive and emotional capacities he needed to develop were, first, the knowledge and empathy that comes from understanding what it is really like for a stakeholder to have the goals and pressures that they do. The second capacity was a balanced power style.
- Level of Awareness and Intent: Awareness-wise to learn to reflect in the moment and to see human systems. Intentionality-wise to develop a capacity-building orientation.

Reflection exercise at end of this mini-webinar

At this point, there are a couple of reflection questions to respond to in your workbook:

1. What are the key building blocks to have in mind when coaching a client to transition from Achiever to Catalyst in the area of Stakeholder Agility in Pivotal Conversations? And how can you go about identifying what these are, specifically?
2. Do you have any current or recent clients working on this particular issue? If so, what ideas might it be (or have been) helpful to "steal" from the material in this mini-webinar?

When you finish jotting down your responses to these reflection questions, please move on and view the second, companion mini-webinar, which talks about how Joe was actually coached.