

Joe's Case: Stakeholder Agility – Achiever to Catalyst Part II: High-level overview of the coaching process

This is the second of two mini-webinars focusing on a client we're calling Joe, still focusing on his development from Achiever to Catalyst in the area of Stakeholder Agility.

The purpose of this second mini-webinar is to describe where Joe was at the end of the coaching engagement, and, at a high level, what kind of coaching was used to help him get there.

As with the first mini-webinar, we strongly recommend that you take notes as you listen. These notes will help you in doing the reflection exercise at the end and will help boost your retention when we discuss this case in the upcoming group session. You will also find a transcription of this mini-webinar in the online Library for the program. You should bring that transcription with you to the group session.

The graphic is titled "Joe's Action Plan" and is set against a dark blue background. It contains a white box with a table structure. The table is divided into four main sections: Behavior, Mindset, Target Situations, and Reminders. The Behavior and Mindset sections are each split into "From..." and "To..." columns. The Target Situations section contains a single line of text, and the Reminders section contains a single line of text. At the bottom of the graphic, there is a dark purple bar with the "CHANGEWISE" logo on the left and the website "www.changewise.com" on the right.

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 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.	

I'm going to start Part II with a brief overview of Joe's action plan for Stakeholder Agility in Pivotal Conversations.

At the behavioral level he wanted to make a change from jumping right in and arguing the merits of his views, without stepping back to really understand the other person's views and what is behind them, to ... Actively exploring the other's position and what is behind it. While doing this, he wanted to be receptive to the other person, to seriously consider their views, and to express his own views.

The mindset he feels has been keeping the old behavior in place is the assumption that, if he lets up in pressing his own views, he's likely to be dismissed or steamrolled by the other person. The mindset he wants to adopt to make it easier to practice the new behavior is to realize that he can understand others

without necessarily having to agree with them, and that, when others feel understood, they are generally likely to be more receptive than if they don't feel this way.

Joe's Results

Applications of the new mindset and skill-set:

- Working through **disagreements with peers**
- Giving and discussing feedback on the CEO's behavior and on Executive Team dynamics
- Setting a more open tone in his own team
- Dealing with direct-report performance issues

Title promotion (CTO), more responsibility, and salary increase

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How did Joe do in making these changes? I worked with him for over a year, averaging 1-2 sessions per month. As he moved along in developing Catalyst stakeholder agility, he gained greater confidence in his ability to raise and successfully deal with difficult issues. When we wrapped up, he was (quote) “exploring others’ views” very reliably, even under stress, not only with his peers but in all his key relationships:

- Raising and working through issues in **executive team dynamics**
- Raising and discussing **feedback on the CEO's behavior**, both one-on-one and in executive team meetings. And the CEO increasingly relied on him as a leader of the company.
- Working through **disagreements with peers** (e.g., Product Design)
- Setting a more open tone in **his own team**
- Dealing with **performance issues with DR's**

His increased effectiveness was rewarded with a title promotion (CTO), more responsibility, and a salary increase.

Joe's 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">Understanding 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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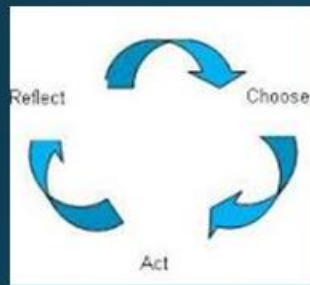
Before giving you a high-level summary of the coaching process I used with Joe, let's do a quick review of the building blocks from the previous mini-webinar.

- I've already described the **behavior and mindset shifts** from his action plan.
- **Cognitive & emotional capacities:** 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 he needed to develop was a balanced power style.
- **Level of Reflective Action:** Awareness-wise to learn to reflect in the moment and to see human systems. Intentionality-wise to develop a capacity-building orientation.

As you would expect, in our coaching sessions, he would set the agenda, with the understanding that the primary focus would be on his action plans. Because he was working on three action plans at the same time, we didn't spend all our time on this one. But we did come back to it very frequently, because, very often, the immediate issues he faced required challenging pivotal conversations.

Usually, these were upcoming conversations, often but not always with peers. But sometimes he wanted to debrief a conversation with me to tease out what he'd done well or what he could change next time around.

Self-Leadership Agility



1. **Set your intention:** Choose your leadership development goals
2. **Practice:** Find everyday opportunities to experiment
3. **Reflect:** Learn by reflecting and seeking feedback

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But I would also say that what Joe did **between** coaching sessions was at least as important for his growth as a leader as what we did within them. Between sessions he engaged in what I call a self-leadership agility process, which takes the form of a reflective action cycle focused on your own development. Another way of putting it is that it's a process of practice and reflection. The idea that development takes place through practice was a familiar one to Joe. He was a drummer, and I think all musicians have a pretty deep appreciation of the value of practice.

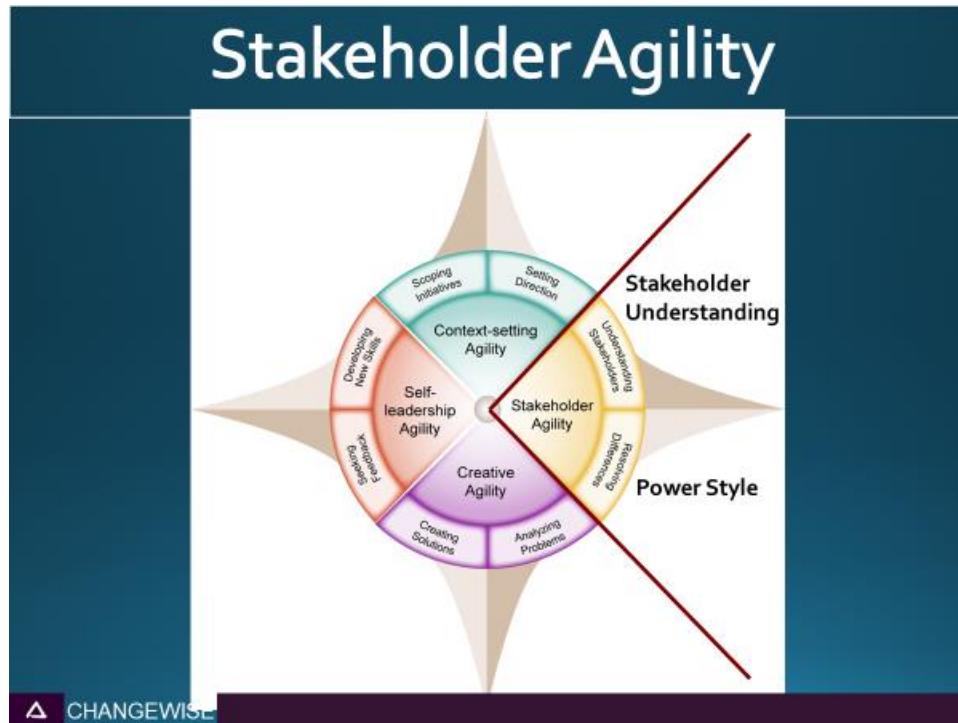
Focusing on the self-leadership cycle: First, by putting together an action plan, he had a clear intention about the behavior and mindset he wanted to practice. He renewed that intention at the beginning of each week, when he looked ahead to meetings and conversations that were likely opportunities to practice. On top of that, he pulled up his action plan each morning to give it a quick look and re-set his intention for the day.

Second, whenever he could remember to, when he was in a pivotal conversation, he tried to practice the new mindset and behavior. Third, he would reflect on how these attempts went, what went well, and what he might do differently next time. And, increasingly, he would ask others for feedback.

The coaching sessions themselves became opportunities to retrospect on key conversations. Here, he might see that there were some really helpful questions he could have asked the other person, but did not do so. So, he would set an intention to bring these questions into his next conversation with them.

In these retrospective conversations with Joe, I would also ask about what mindset was active while he was talking with the other person: Was it more like the one he was trying to change or more like the one he wanted to develop?

Joe also brought to our sessions upcoming challenging conversations that he wanted to be more prepared for. In addition to helping him think through the approach he wanted to take, we looked at his mindset as he anticipated them. Over time, the old mindset became more conscious, and it became easier for him to touch and acknowledge the fear of being overpowered and let it go.



Now, what did my knowledge about vertical development add to the coaching I've just described? Specifically, how did it help to know the cognitive and emotional capacities involved in the shift from Achiever to Catalyst Stakeholder Agility?

Catalyst Power Style



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One capacity Joe needed to develop was a Catalyst Power Style. This meant that he needed to go beyond his habitual tendency in pivotal conversations to express his assertive side and to dampen his receptivity. By becoming more aware of when he was advocating and when he was inquiring, he became more familiar with the inner impulses behind both modes of expression.

When he brought an upcoming pivotal conversation to discuss, we would always discuss the question of power style. Not with the assumption that a Catalyst Power Style is **always** best, but in a way that allowed him to think things through and make his own choices about how to proceed.

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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The other capacity that makes Catalyst Stakeholder Agility possible is Stakeholder Understanding. In (quote) “exploring other’s views,” Joe wanted to go beyond the Achiever approach of simply soliciting and considering their opinions. He also wanted to understand, in an empathetic way, what lay behind their views. What pressures were they under? What were their deliverables? How did this stakeholder, as a unique personality in their particular situation **feel** about the issue at hand and about possible solutions?

Reverse Role-Play



Joe



Alan

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I looked at every discussion Joe and I had about a pivotal conversation as an opportunity to help him develop his stakeholder understanding. A technique I used a few times to help Joe develop his stakeholder understanding is something called a “reverse role-play.” This is something I learned from my colleague, Stephen Josephs. I’ll use the example of an upcoming conversation with the head of Product Design. We’ll call that person Alan. The purpose of the meeting was to discuss their differing views about the new product design specs Alan was proposing.

Reverse Role-Play



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In some sense the reverse role-play is sort of a “mind-meld” technique. It works like this: After getting Joe’s permission to guide him through the exercise, I would help him get into a semi-relaxed state and ask him to close his eyes and begin to put himself, physically, in the place of the head of Product Design.

Rather than going straight to questions about how Alan might feel, I would ask him to take a little time to imagine that he **was** Alan, sitting in his office anticipating a meeting with Joe about the new product. As Alan, sit the way he would sit. Take on Alan’s posture, attitude, and mindset.

I would then speak to Joe **as Alan**: Something like, “Alan, I understand that your team has come up with a new product, that you and Joe have some disagreements about the specs, and that the two of you are getting ready to talk about this.” Then I let Joe respond, as Alan.

It’s important to keep the client in the head-space of being the other person throughout the exercise. If they suddenly break out of this and start talking as themselves, they need to be gently but firmly guided back into the space of being the other person.

After the initial response, I might say, “Alan, I understand your about to meet with Joe. What are your primary hopes and concerns about this meeting?”

After Joe responds, I might say, “What could Joe do in this meeting that would make you feel it’s a conversation where you feel you fully understand one another and come to a mutually satisfying conclusion?”

After Joe had a chance to explore the upcoming conversation from Alan’s perspective, I would gently bring him back to himself, and I’d ask him what stood out to him from the exercise. Now, there was no guarantee that what Joe came up with was exactly what Alan was feeling. But I’ve always been amazed at how much insight this kind of exercise generates.

This technique that works well with leaders who are in the Achiever-Catalyst transition or beyond, because it activates the Catalyst level of awareness and the underlying Catalyst capacity of stakeholder understanding. Another example of a reverse role-play in a different context, can be found on pages 207-8 in the Leadership Agility book.

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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Otherwise, here’s how I helped Joe activate a Catalyst level of awareness and intent while working with him on the specific issues he brought to our coaching sessions: As I mentioned earlier, for this particular action plan, the “human system” meant his working relationships with his stakeholders. Repeatedly reflecting on these conversations helped him see each pivotal conversation as an opportunity to build strong relationships that could strengthen the cohesiveness of the executive team, model collaborative behavior, and help the company weather the various storms the company was going through.

Along with this, I helped Joe activate both Achiever (post-event) and Catalyst (during event) reflective awareness, in other words, reflection before or after an event and also during events. He gradually learned to be more aware in the moment, observing his own thoughts and feelings while in a pivotal conversation. We talked about the kind of awareness that works best for this – non-judgmental, not overthinking, patient, just noticing. This is something that requires real practice, but comes to feel more and more natural as your ability to “reflect in the moment” grows.

Wrap-up



- “Self-coaching”
- Resilience
- “Surfing his experience”

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In the final session of our engagement, I asked Joe to reflect back over the process and see if he could put into words how he had changed as a result of the coaching. One thing he said was that he felt he had developed his capacity for what he called “**self-coaching**,” meaning the same thing I mean by “self-leadership agility.” In the midst of an extremely hectic schedule, he had become much more adept at finding time to reflect and learn from his experience.

For example, every other week he had to fly from New York City to Boston, where his company was located. Rather than spend that time just letting his mind wander or worrying about problems, as he used to, he put at least part of that time to better use. He wasn’t being overly serious and or obsessing. He was just more focused and reflective.

But the main thing, in terms of inner change, is that he felt he’d become **much more resilient**. When I asked him to expand on how that had happened, he said it was because he was so much better at pivotal conversations. He felt an increased confidence that he could handle whatever came up. But more than that, he said that, because of the company’s challenges, he’d been through lots of cycles of stress, a wide range of emotions, and was really learning to accept and experience whatever emotions came up.

He was describing Catalyst-level awareness. In addition to being a drummer, he was an active surfer. I had frequently turned to his surfing experience in our coaching sessions, asking him how the sense of balance and presence he experienced there might be extended to challenging conversations. As he talked with me in our last session, it struck me that he’d come a long way toward learning to (quote) “surf his experience.” When I shared that thought with him, it resonated very strongly.

Reflection exercise at end of mini-webinar

Now that you've finished the two mini-webinars for the session on Achiever to Catalyst Stakeholder Agility, please go to your workbook and answer the reflection questions for this second mini-webinar.