Dale's Case
Stakeholder Agility – Expert to Achiever

Bill Joiner here. This is the first of two mini-webinars with a teaching case on how to help a leader shift from Expert to Achiever in the area of Stakeholder Agility.

The focus of this mini-webinar is on how to help an Expert shift to the Achiever level in the Stakeholder Agility dimension of Pivotal Conversations. I'll use a real-life coaching case to walk you through how to go from what we call a coaching "action plan" focused on this shift to include other relevant aspects of the Leadership Agility framework.

The second mini-webinar is about the same case, but focuses on what the coaching process itself was like.

There is a lot of information in these two mini-webinars. We strongly recommend that you take notes as you listen. These notes will help you in doing the reflection exercise at the end of each "mini-webinar" and will help boost your retention when we discuss them in the upcoming group session. 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.

We will call the manager we'll be focusing on Dale. At this time, he was a bright, experienced, opinionated professional in his mid-30s. He had been the Quality Assurance Manager for a small software company for about a year-and-a-half. Previous to this, he had five years of experience in different Quality roles.

Let's start by giving you a little context. You can see from this chart that Dale reported to the VP of Engineering. His primary peers were managers of software development teams and personnel in the Product Design Department.
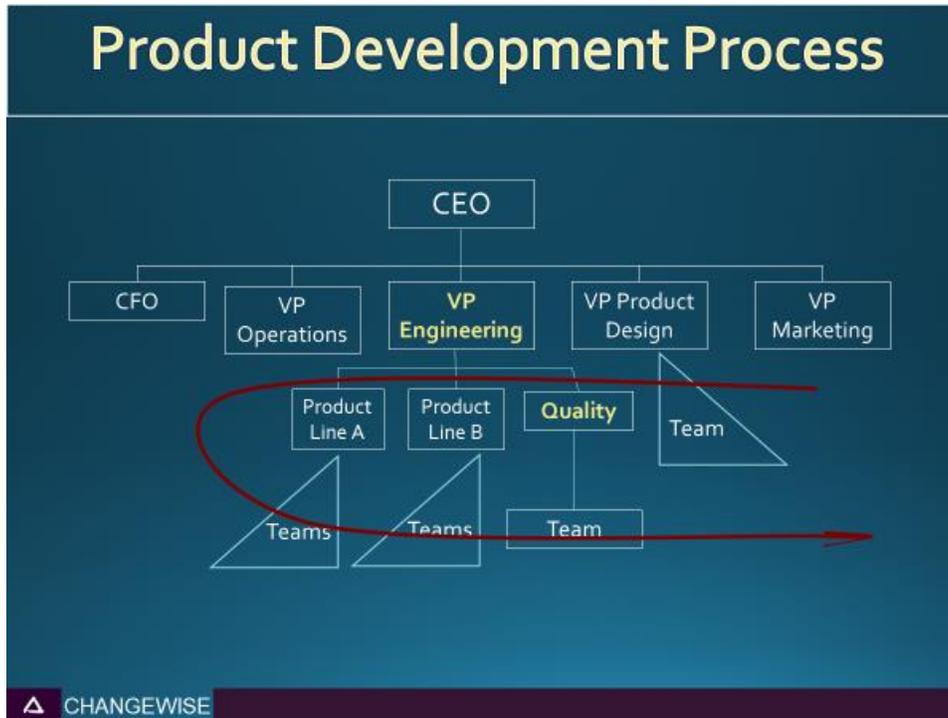
At this point in time, the product development flow worked like this: In most cases, new product ideas were generated by Product Design, using input from Marketing. Design specs were then given to the Engineering teams who created the products. As you can see from the slide, Quality was not integrated into the work of the software development teams. This was before the company adopted Agile.

Another part of the context is that the CEO and his direct reports had all done Leadership Agility 360s. Although Dale was a very bright and experienced manager, his boss, the VP of Engineering, kept getting feedback that Dale, was alienating many of the people he worked with. His boss tried to coach him into a more constructive approach, but did not make much headway. So he talked with Dale about doing a Leadership Agility 360 and working with a professional coach. Dale had never worked with a coach before, but he was quite willing to do so.

He selected Debbie to be his coach.
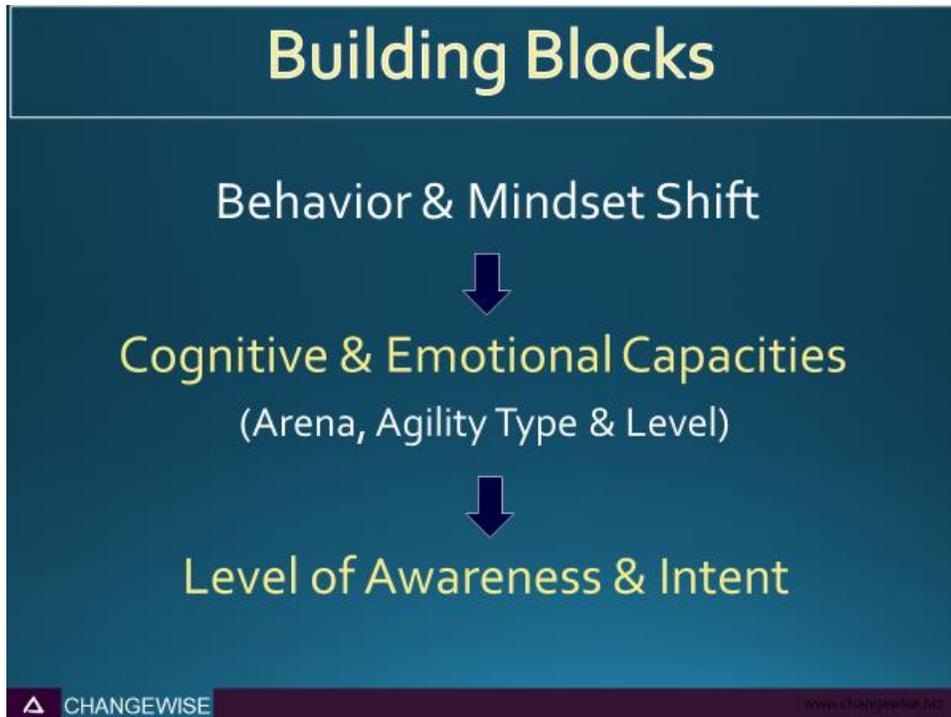
To take full advantage of the Leadership Agility framework in your coaching, you need to consider three fundamental building blocks:

- First, a coaching action plan. Most of you are familiar with this action plan template, which is what we use both with the Leadership Agility 360 and the Leadership Agility Accelerator. We strongly recommend that you use a similar template to document your client's coaching agenda, one that captures both a desired behavior change and a supporting mindset shift. In Dale's case, we'll use one of the action plans that came out of his 360 feedback.

- Second, it's important to pinpoint the shift in agility level implied in the action plan, as well as the cognitive and emotional capacities that need to be developed to support a higher level of agility in the specific arena and type of agility the action plan focuses on.

- Finally, to support his movement from one level of agility to another, it is also important to help him activate, in this case, Achiever awareness and intent while practicing the new behavior.

- I'll now go through these building blocks in Dale's case in a bit more detail.

- Let's start with Dale'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. You may have your own way of pulling together a coaching agenda for each of your clients, but this is what we use. If you're interested in a re-useable template just like this, let us know, and we'll get it to you.

- The new, more agile behavior to which Dale aspired was to "Be more collaborative. Ask questions, ask for feedback. Give others room to explore their own thoughts. Be transparent about my thought process, using data."

- When asked, essentially, what are you doing now instead of that, he said: "I've usually already made decision and try to force them into a yes/no response. I don't explain the reasoning behind my conclusions, or give them time to explore their own thoughts."

Dale's Action Plan

Behavior	
From...	To...
I've usually already made a decision and try to force them into a yes/no response. I don't explain the reasoning behind my conclusions, or give them time to explore their own thoughts	Be more collaborative. Ask questions, ask for feedback. Give others room to explore their own thoughts. Be transparent about my thought process, using data
Mindset	
From...	To...
Feeling upset when people do things with low standards and accountability. Feeling they should listen because I'm the expert on Quality here	Realizing a more collaborative approach will be more satisfying and productive for both of us
Target Situations	
Reminders	

- Dale's action plan also identified a specific mind-set shift that would support him in growing into the behavior to which he aspired. As a result of some coaching questions, he realized that most of his challenging conversations with peers were about situations where he felt that others were stooping to what he considered low work standards and either were not holding others accountable as they should, or that the were not themselves being held sufficiently accountable. He would jump from this emotional reaction to opinions about how things should be done differently, and was off and running, expressing himself like an Assertive Expert.

- Reflecting on the mindset that would best support him in actively exploring others' views, he realized that a collaborative approach would be more satisfying and productive for himself and the other person, even if it meant letting himself be influenced through collaborative dialog.

Dale's Action Plan

- Finally, as I've noted, Dale said his primary opportunities to practice this new mindset and behavior were in one-on-one meetings with peers. To help him remember to practice, 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.


Building Blocks

Once you have a behavior change and mindset shift to work with, the next step is to identify the cognitive and emotional capacities your client needs to develop for this practice. You identify these by triangulating the relevant action arena, type of agility, and shift in level of agility.

In this case, the focus is on Stakeholder Agility in Pivotal Conversations.
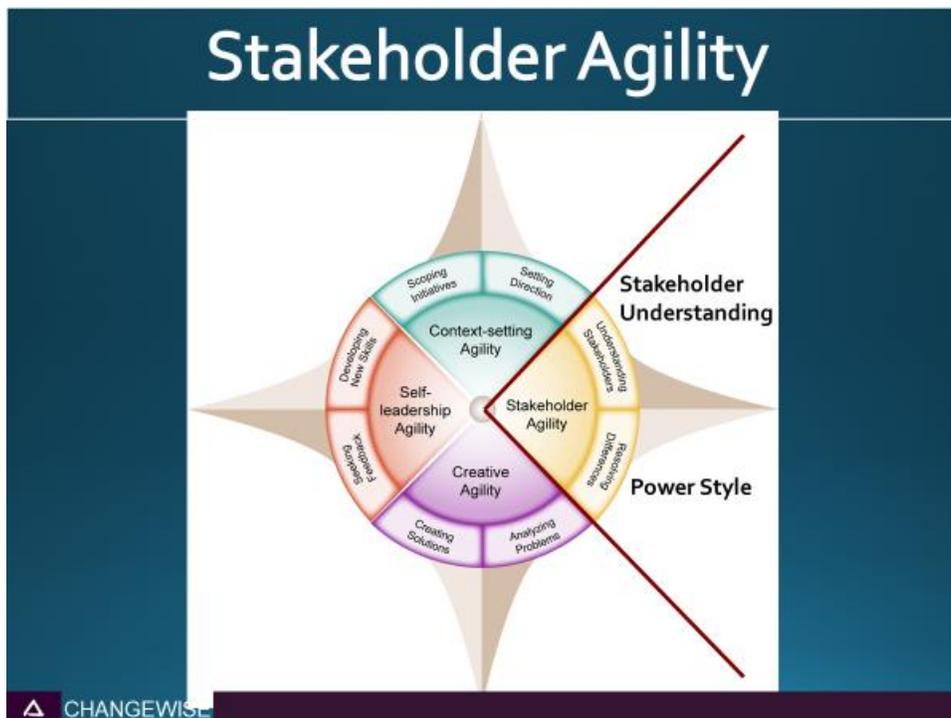
To identify the relevant cognitive and emotional capacities, let's start with Stakeholder Agility. As you'll remember, Stakeholder Agility is located here on the Leadership Agility Compass. It is made up of two leadership agility practices: Understanding stakeholders and power style.

Stakeholder Understanding: Expert to Achiever

|	Expert	Achiever
Knowledge (cognitive)	• Low curiosity • Untested assumptions & attributions	• Find out their views • Take them into account
Empathy (emotional)	Stand in my own views	Put myself in their shoes

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When we look at the Expert to Achiever 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 Experts and Achievers can access different levels of knowledge and empathy.

Experts make lots of assumptions and attributions. An "attribution" is an interpretation of why another person acts as they do, as in "attributing motives" to another person. Experts rarely "test" their assumptions and attributions, instead tending to think that whatever they're thinking is probably correct. Nor are Experts very curious about finding out what is actually behind others' behavior. We can see how Dale's "from" behavior is consistent with the Expert's approach to understanding stakeholders.

Achievers, on the other hand, are open to others views and often ask questions to better understand where others are coming from. And they not only ask, they take in others' perspectives and take them into consideration. This is exactly what Dale wanted to do in the practice we're focusing on here.

When it comes to empathy, the emotional dimension of Stakeholder Understanding, Experts tend to stand in the clarity of their own views and opinions, without doing what an Achiever is able to do, that is, stretching to feel what it might be like to stand in another person's shoes, to face their situation.
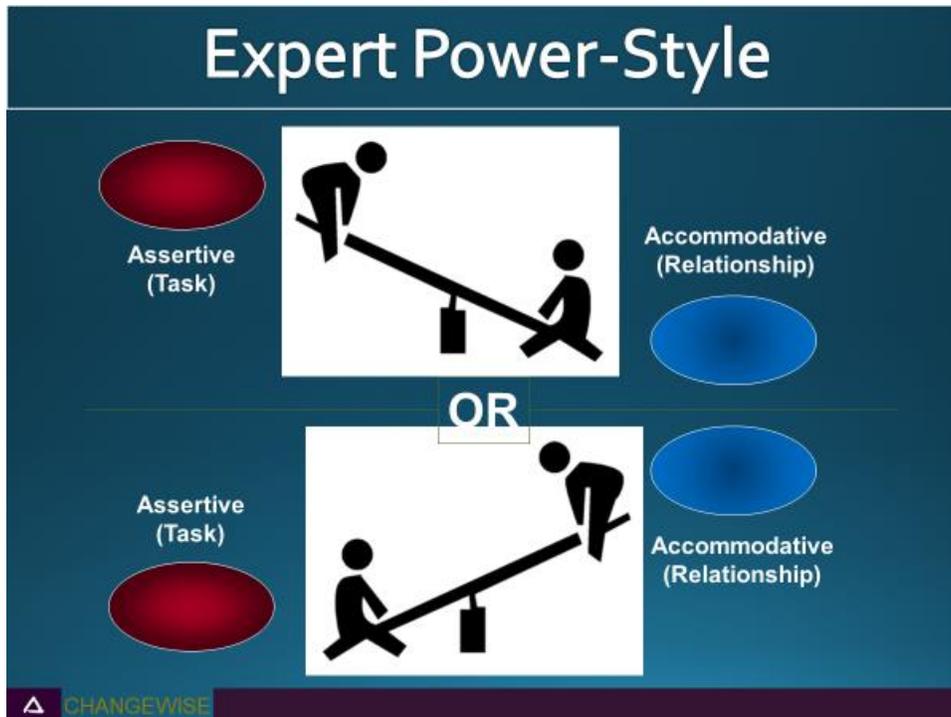
Power Style has to do with the way in which a leader balances two basic desires that get activated, consciously or unconsciously, in Pivotal Conversations: A desire to assert yourself and influencing others, and a desire to understand and empathize with others. The assertive desire tends to have more of a task focus, whereas the accommodative desire emphasizes receptivity and has more of a relationship focus.

We can see in the "from" part of his action plan, in Dale's pivotal conversations with peers, his power style was that of an Assertive Expert.

An Expert's power style often flips back and forth between highly assertive and highly accommodative. This is usually driven by being in different kinds of situations and relationships. Sometimes we see Experts acting in highly assertive ways in one kind of relationship and in highly accommodative ways. This happened to be true of Dale. In one-on-one conversations, Dale was, as we've seen, highly assertive. This tendency is represented by the top graphic on this slide, where the assertive side is dominant.

Yet in group meetings, he often held back, possibly because he was an introvert. So, although we'll be focusing in this case study on 1-on-1's with peers, it may be helpful to know that another side of himself emerges in group meetings. This tendency is represented by the bottom graphic on this slide, where the accommodative side is dominant.
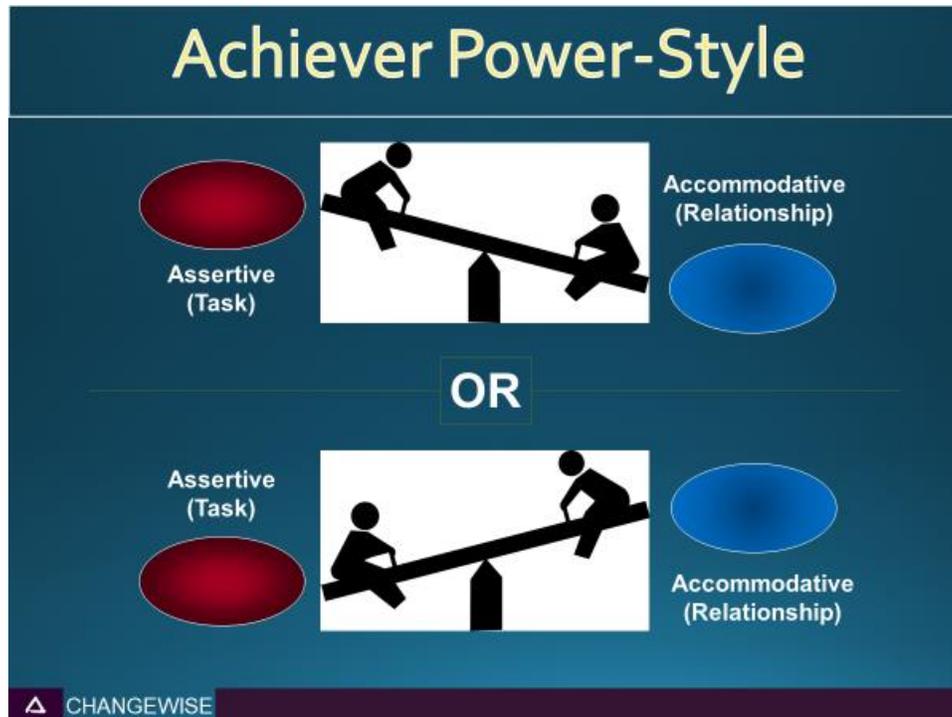
An Achiever power style is more balanced than that of an Expert, but it still tends to emphasize one of the basic impulses – Assertiveness or Accommodation – over the other, while compensating to some extent with the other impulse. This is what the see-saw figures on the slide represent.

To become more collaborative, Dale needed to shift his power style into that of an Achiever who was able to ask for feedback and ask questions that elicited others' views. But who could also be clear and transparent not only about his own positions, but about the reasoning and data he used to arrive at them. This shift from expecting others to be persuaded because of your authority and expertise, to making your reasoning transparent and discussable, is part of the shift from Expert to Achiever.

Stakeholder understanding and power style are what the Leadership Agility model calls the **cognitive and emotional capacities** that evolve as a leader moves from Expert to Achiever in the area of Stakeholder Agility. If Dale tried to act more collaboratively without simultaneously developing these capacities, it would be a struggle. So the coaching for Dale needed to include deepening his stakeholder understanding and balancing of his power style.
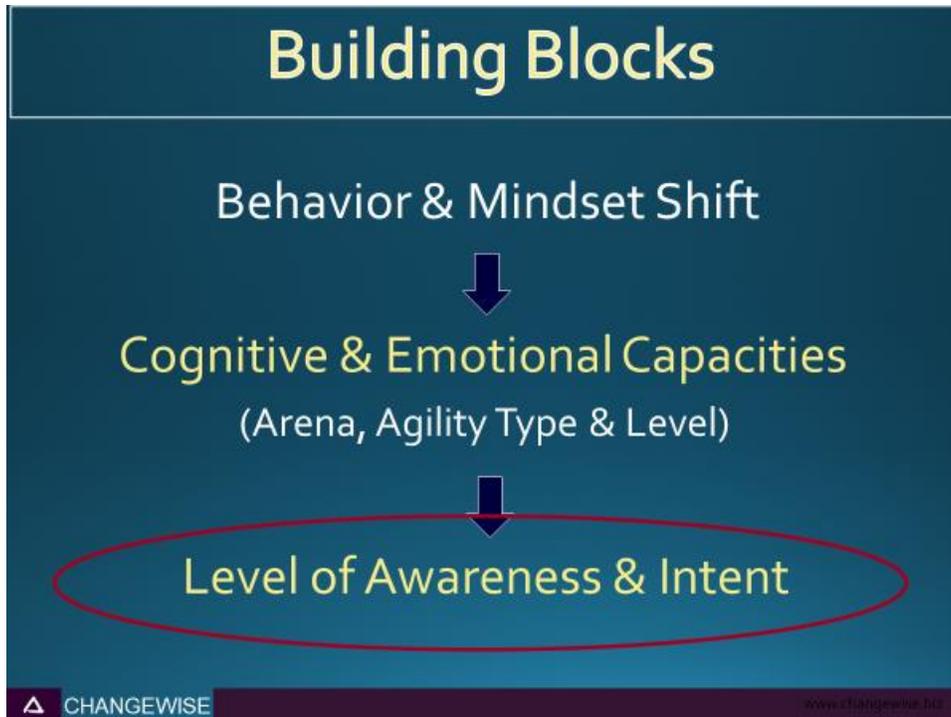
Finally, we need to identify what kind of shift in level of awareness and intent entailed in Dale's action plan.
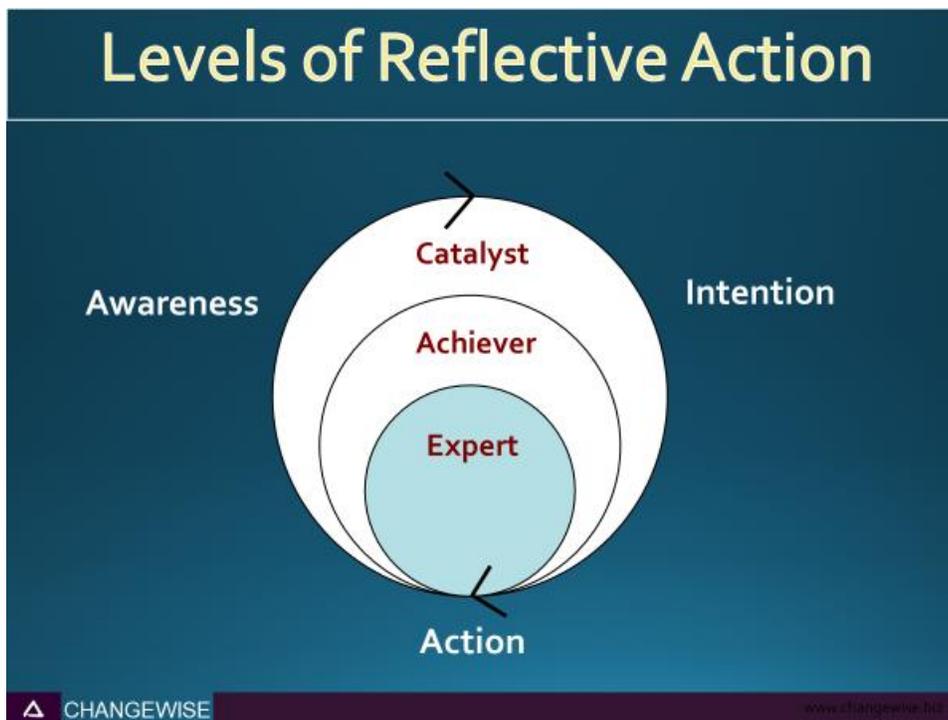
This graphic highlights the fact that, in this model, awareness and intent are different movements in the same reflective action cycle. In this case, the aim is to help Dale expand his Expert-level awareness and intent to include Achiever-level awareness and intent. Like this …

Levels of Reflective Action

Catalyst
Achiever
Expert
Awareness
Intention
Action

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Levels of Awareness and Intent

	Expert	Achiever
Intent	To solve problems and make incremental improvements	To achieve desired outcomes for valued institutions
Awareness	Modest reflective capacity Focuses on one problem, person, one part of the organization at a time	Robust reflective capacity – making connections, seeing relationships Sees teams, organizations, and industries as systems

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To identify the specific shift needed in level of awareness and intent, let's remind ourselves that the shift from Expert to Achiever intent moves beyond an intent "To solve problems and make incremental improvements." Achievers build on and expand this intent, which becomes "To achieve desired

outcomes for valued institutions."

Here, (quote) "valued institutions" means an organization or professional field that is valued by this individual. In other words, if I can play a leadership role, making contributions to an institution I value, then, as an Achiever, this is highly motivating for me.

The shift in level of awareness from Expert to Achiever would require Dale to develop a more robust reflective capacity – making connections, seeing relationships – and thereby seeing teams, organizations, and industries as systems.

Dale's Building Blocks

Building Blocks	Points of Focus
Behavior change Mindset shift	• Ask questions, ask for feedback. Give others room to explore their own thoughts. Be transparent about my thought process, using data • A more collaborative approach will be more satisfying and productive for both of us
Cognitive and emotional capacities	• Put myself in their shoes • A more balanced & constructive power style
Level of awareness & intent	• Robust reflective capacity • Achieve valued outcomes

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To summarize, three key steps in preparing for vertical development coaching in this particular area are:

• Create an action plan that captures a specific behavior change and the mindset shift needed to support that change.

• Identify the cognitive and emotional capacities needed for your client to develop to the next level in this area.

• Identify the underlying shift in level of awareness and intent that's also needed.

Now, having taken in this information about how to draw on the Leadership Agility framework to coach Dale's, please go on to view the much shorter mini-webinar that will tell you how Dale was coached and what the results were.