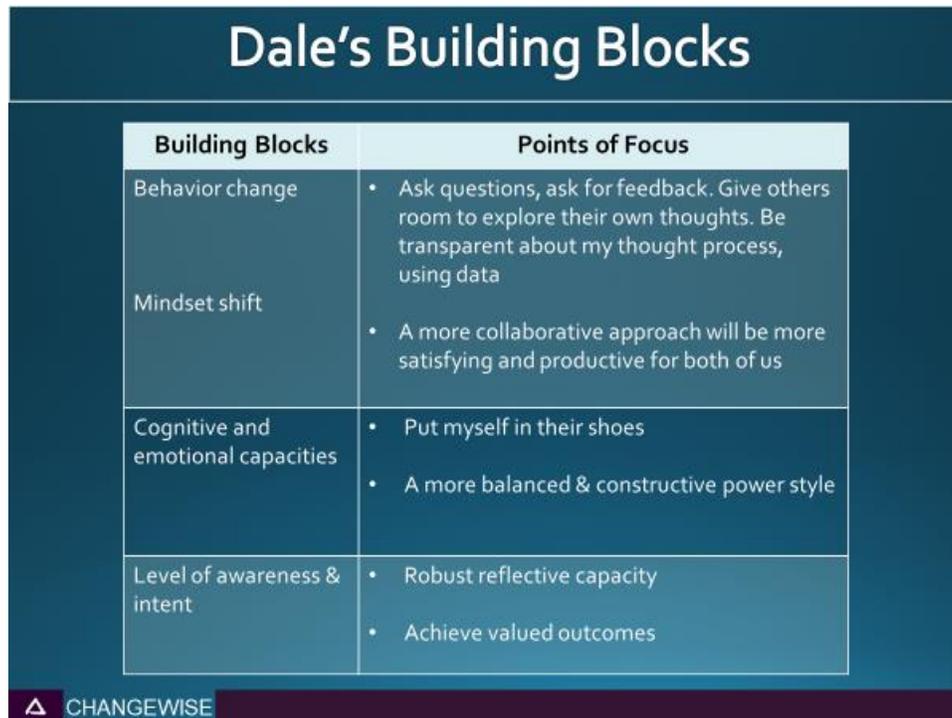


Dale's Case: Stakeholder Agility – Expert to Achiever

Part II: Results and high-level overview of the coaching process

Title slide: Bill Joiner back again. This is the second of two mini-webinars focusing on a client we're calling Dale, still focusing on his development from Expert to Achiever in the area of Stakeholder Agility.

The purpose of this second mini-webinar, which is much shorter than the first, is to describe where Dale was at the end of the coaching engagement, and, at a very high level, the kind of coaching used to help him get there.



The table is titled "Dale's Building Blocks" and is set against a dark blue background. It contains four rows of data, each with a "Building Blocks" column and a "Points of Focus" column. The first row links "Behavior change" and "Mindset shift" to a focus on asking questions and being transparent. The second row links "Cognitive and emotional capacities" to a focus on empathy and a balanced power style. The third row links "Level of awareness & intent" to a focus on reflective capacity and achieving outcomes. A "CHANGEWISE" logo is in the bottom left corner.

Building Blocks	Points of Focus
Behavior change Mindset shift	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Put myself in their shoes• A more balanced & constructive power style
Level of awareness & intent	<ul style="list-style-type: none">• Robust reflective capacity• Achieve valued outcomes

I'll start Part II with a reminder of the building blocks for coaching Dale in the area of Stakeholder Agility in Pivotal Conversations.

- 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.”
- The cognitive and emotional capacities Dale needed to develop to do this were: First, to develop a capacity for empathy by learning to put himself in the shoes of others. And second, to develop a more balanced and constructive power style.
- Finally, to develop these capacities in the most reliable and efficient way, he would need to develop Achiever reflective action – meaning a more robust reflective capacity that could think in terms of relationships and systems, plus a new kind of intentionality, focused on achieving valued outcomes.

Dale's Results

	From	To
Stakeholder Understanding	<ul style="list-style-type: none">• Other people are doing it wrong. They are arrogant, insensitive and unprofessional	<ul style="list-style-type: none">• Taking a helicopter view• Finding out what's behind others' actions
Power Style	<ul style="list-style-type: none">• Harsh criticism• Not sharing his own thought process	<ul style="list-style-type: none">• Sharing his thought process and data• Actively inquiring

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Now I'd like to give you a high-level snapshot of the coaching process and how things turned out. Early in their coaching relationship, Dale often complained to Debbie about various peers he worked with. He complained that they were not doing their jobs correctly, which he attributed to a combination of arrogance, laziness, insensitivity, and lack of professionalism. He was a more experienced manager than many of these people. He felt they were doing many things the wrong way and that he knew better ways.

When Debbie asked if he'd discussed these matters with his coworkers, he expressed frustration that they did not listen to him, did not seem to value his experience and expertise. He was frustrated that others did not listen to him and sometimes seemed to avoid him. He felt conflicted. On the one hand, he wanted to share his experience about effective methodologies, but on the other hand, he felt he shouldn't have to do that – that they should already know how to do it the right way.

As Debbie asked more about this, she – and Dale – discovered some key things about his power style. He often expressed rather harsh criticism about how others were doing things, and he rarely shared the reasoning or the relevant data that led him to his views. The frustrating outcomes of these conversations sometimes led him to withdraw from these conversations to avoid unpleasant experiences, all the while silently gritting his teeth at some of the things they were doing.

In other words, Dale had a classic Expert power style that tended to see-saw between assertive and accommodative.

Dale's boss had told Debbie that one of the reasons they hired Dale was because his organization was fairly inexperienced. He wanted Dale there as someone who could share his experience with others for the benefit of everyone. Dale had no authority over the people in question, and one area where he was not experienced was in influencing others without using his authority.

Debbie also felt that Dale had a lot to offer, if he could find a way to share his experience in a more empathetic manner. Many of their coaching sessions focused on how he could do this. One technique Debbie used that he began to practice quite a lot was developing a helicopter view of whatever he was concerned about. If he felt a team was having difficulty, he learned to a bird's-eye-view vantage point that gave him new insights about what was going on and what it would look like if the team was working really well together. Or he would look at his relationship with a peer in the same way. This was one way he developed his stakeholder understanding.

The other way was through learning to engage with his stakeholders in new ways. He learned to put his own views temporarily on hold so he could (quote) "listen for understanding," which of course, is very different from his habit of listening for what was wrong with a differing view. He also began to ask others for feedback. By practicing greater receptivity in many conversations, he learned to put himself in others' shoes, and he discovered a lot more about why others approached things as they did.

Debbie also helped Dale learn to make his own thought process more explicit by asking how he had arrived at a particular conclusion. Often Dale himself didn't really know, so wasn't able to make his reasoning explicit to others. By reflecting on this own thought process and clarifying how he had connected the dots, he became more articulate about his own views and more constructively persuasive.

So, Dale's power style not only became more balanced, but the nature of his assertiveness and the nature of his accommodation changed as he moved into Achiever territory. His Expert approach to assertiveness was harsh criticism without making his own thought process transparent. His newly evolved Achiever assertiveness involved making his own thought process more explicit, as well as sharing any relevant data that had shaped his conclusion.

As an Expert, Dale's accommodative tendency was to withdraw while silently criticizing others. As a newly developed Achiever, his accommodative side expressed itself in genuine listening and a willingness to consider other perspectives.

Dale also became less fixated on doing things just right and developed a much stronger outcome orientation. For example, he expressed this new orientation during a release meeting where everything was going off the rails. Rather than sitting back and silently criticizing the group, he said, "Hey what would happen if we were sitting with the Executive Team and were reporting on a really successful release?" Suddenly, people sat up. Smiles appeared. He said it was like sun shining through the clouds.

Part of the coaching contract was for Dale and Debbie to meet with his boss about once a quarter. This allowed Dale's boss to give him feedback on where he felt Dale was improving the most and the least. They also allowed Dale to let him know if there was anything his boss could do to support his growth.

In the first of these meetings, his boss turned to Debbie and said, “I don’t know what the two of you are doing in those coaching sessions, but it sure seems to be working.”

Finally, when the coaching engagement was complete, Dale had the following reflections on what had happened. He said he had become more self-reflective and more aware of emotional cues in himself and others. He said he’s become more focused on the importance of relationships. He now saw everyone he worked with as a potential relationship and was more inclined to help people beyond his own team.

"I cannot say enough about what this process has done to help me to take my leadership mindset and skills to the next level. I was able to identify where I really needed to improve and gave me a clear picture of what I was striving for.

“My 'pivotal conversations' with colleagues are much more effective now. I’m a better listener all-round. My girl-friend thanks you. The whole process was really invaluable and I would highly recommend it to anyone who is serious about growing as a leader.”

Reflection exercise in the workbook

- Drawing on the material for the two mini-webinars on Dale’s case, what might you do, as Dale’s coach, to help him shift into **Achiever stakeholder understanding and power style** – especially with peer stakeholders? Take notes on page 3 in the workbook for this session.