

Andy's "Learning Case"

Leadership Practice

Client's First Name: Allen	
Name for This Practice: Exploring and Validating Assumptions and Judgements about Others	
Current Behavior	Desired Behavior
<ul style="list-style-type: none"> • I dismiss Board of Directors whom I assume are out of touch with reality • My Board resists change and progress and I have a lot of negative judgement about that • I focus on transactional (assertive) behavior with my Board Chair and other Board members • Because I don't respect them, I avoid building personal relationships with them • I dismiss other points of view that I don't agree with because I know that I am correct 	<ul style="list-style-type: none"> • I am seeking better understanding of my Board as people rather than as obstacles • I reach out and develop personal relationships – I realize that we are on the same team • I encourage and consider different points of view than my own and am curious to explore how they lead to even better decisions • I am demonstrating more accommodative and less assertive behavior in my interactions with the Board and the Board Chair
Current Mindset	Desired Mindset
<ul style="list-style-type: none"> • I'm impatient and feel stressed, micro-managed, undercut, disrespected and not fully trusted by my Chair and the Board • I'm being hyper-critical and dismissive and contemptuous toward the Board and Chair • I'm doubting my own capabilities as a leader 	<ul style="list-style-type: none"> • I'm relaxed and less reactive. I feel empowered to lead the transformation and know the Chair has my back. • I'm more curious and patient when interacting with the Board. I active listen consistently. • I'm more comfortable in my own skin and feel confident about my ability to succeed.
Primary Action Arena:	
Type of Agility: Stakeholder	
Shift in Agility Level: Expert to Achiever	

Capacities to Develop: Stakeholder understanding, the ability to understand and feel what it's like to be in my Chair or Board Members' shoes. The ability to see the other person's point of view as both valid and relevant, even if I don't agree with it. The ability to separate the other person from the issue. The ability to notice and shift my power style from extreme assertive to assertive AND accommodative.

Level of Reflective Action to Develop: Reflecting in the moment when I over demonstrate highly transactional/assertive behavior. I will notice where my body signals tension and will take specific actions to "circuit break" that behavior and substitute more accommodating/relationship oriented behavior.

Relevant Background

Client's Role in the Organization: CEO

Type of Organization (e.g., for or non-profit, industry): Non-Profit, healthcare

Motivation for Coaching: Allen is a highly educated 40-year old first time CEO who has never managed a Board. He was hired to transform his organization. The coaching was self-initiated and he has a strong growth mindset. He is also highly motivated to be successful.

Context/situation: To provide you with helpful feedback what would it be helpful for us to know about the larger situation in which your client is working?

Allen's Board is significantly older, affluent, and 100% Caucasian. His Board is split in terms of embracing his bold new strategy. Also, Allen and his Board Chair (Barbara), who is new to the Board, have a complex relationship. On the one hand, Barbara believes in the new strategy. On the other hand, she is reluctant to speak up when some vocal Board members demonstrate resistance. Allen is frustrated because Barbara frequently calls him to discuss operational issues – issues that he feels belong within the CEO's purview and not the Board's – and this leaves him feeling micromanaged and not trusted. Other times, Barbara calls Allen to complain that he's left her out of the loop on personnel issues. From Allen's perspective, this is another example of micromanagement. Allen realizes that his ultimate success relies on his ability to effectively engage and bring the Board along to gain their formal and informal support for him and the new strategy. He is self-aware enough to realize that he can't figure this out alone and that he has blind spots that are getting in the way. He also realizes that he needs to figure out how to work more effectively with Barbara – a tall order given their different personalities.

Challenge: What led you to use this “case” for receiving feedback? In helping this person develop their desired behavior and mindset for this practice, in what way do you feel challenged or unsure of the best way to proceed? Please be as specific as possible.

This case has layers of complexity to it. I chose it because my client is attempting to do important work with an important organization. On the individual level, we have Allen’s strong *Expert* orientation when he interacts with his Board and Chair, we have the Chair’s *Expert* orientation toward Allen, and her apparent overly accommodative behavior with her Board. At the same time, I believe that Allen is a Catalyst in terms of his big and bold strategy for the organization. On the team or group level, we have a Board that is not aligned on Allen’s vision, even though they say that they are. (Their lips are moving in the right direction but their feet are still planted.) And on the system level, there are multiple camps: the early adapters, the fence sitters, and the resisters who hang on to “the old way we do things around here.” Allen’s judgement clouds his ability to see how he contributes to the problem.

Feedback: What kind of feedback would be of greatest value to you? I’d appreciate feedback about my approach to date. Am I diagnosing the issues accurately? Am I seeing the forest and the trees? Am I overlooking opportunities to help my client navigate this situation? Have I over indexed a particular approach or assumption? Thank you.