

# Jenna's "Learning Case"

## Leadership Practice

<b>Client's First Name:</b> Kevin	
<b>Name for This Practice:</b> Develop Business Acumen / Transformation Project	
<b>Current Behavior</b>	<b>Desired Behavior</b>
<ul style="list-style-type: none"> <li>• In survival mode</li> <li>• Transactional about key objectives – check the box to get it done</li> <li>• Make incremental improvements to current processes</li> </ul>	<ul style="list-style-type: none"> <li>• Think bigger picture and the role my department has in the organization</li> <li>• Strengthen relationships within Program Office so they understand the value my department provides and we work collaboratively</li> <li>• Set strategic objectives</li> </ul>
<b>Current Mindset</b>	<b>Desired Mindset</b>
<ul style="list-style-type: none"> <li>• I'm the only one who can do this</li> <li>• If have to prove my competence/expertise</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Seek out others who can support the project</li> <li>• Consider other's interests &amp; needs in the larger context</li> <li>• Don't be so quick to come up with the answers; Listen more and be more curious</li> </ul>
<b>Primary Action Arena:</b> Leading Organizational Change	
<b>Type of Agility:</b> Context Setting Agility	
<b>Shift in Agility Level:</b> Expert-Achiever to Achiever-Catalyst	
<b>Capacities to Develop:</b> Strategic outcome orientation. Setting Direction – foster external relationships; think about short-term and long-term effectiveness rather than incremental changes and take action	
<b>Level of Reflective Action to Develop:</b> to see his team and the organization as a complete system; see the larger context and reflect in the moment	

## Relevant Background

<b>Client's Role in the Organization:</b> Manager, Risk Assessment
<b>Type of Organization</b> (e.g., for or non-profit, industry): Non-profit, public health & safety sector
<b>Motivation for Coaching:</b> To develop his capacity to lead through change; his role is shifting and he's being requested to support the Director in helping the department transition from being a Support department to a P&L function. He wants to be a Catalyst Leader.
<b>Context/situation:</b> 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?  Kevin was promoted to Manager, Risk Assessment for the Toxicology dept. a couple years ago. As a new leader and a technical expert, this was the first time that Kevin was managing people. He's incredibly intelligent but focuses on what he can deliver and is quick to identify solutions and then push for them to be implemented without much consideration for ramifications of such changes.  His manager (Director of Toxicology) knew there would be a learning curve but since the work the department does is so technical, the Director chose to place Kevin in the role because of his expertise and knew she would have to mentor him in people leadership.  The organization has embarked on a global Transformation Project to right size the entire business. The Toxicology department is now moving from a support function to a P&L function. This means they will need to generate business from internal and external clients. The Director has tapped Kevin to support her in helping transition the department into a P&L function.  With the Transformation Project, Kevin's role just changed from managing a team to being a Senior Principle Toxicologist. This isn't a demotion. It is a reflection of the new organizational design for the global business. However, Kevin role still requires him to develop relationships with the Program Offices in order to get paying client work.
<b>Challenge:</b> 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.  With so much volatility within the business right now, it's been challenging to focus on one specific area for coaching because there's SO MUCH CHANGE. He wants to develop "Business Acumen" but with all the change, it's nearly impossible for him to articulate what the vision and context is. I'm certain a large part of this is due to his role – he doesn't have the same line of sight at this stage in the transformation project.  So lately, we've switched the focus to Pivotal Conversations and Stakeholder Agility. Is bouncing between Pivotal Conversations, Team Performance and Organizational Change okay to do? I meet my clients where they are and I have no problem with that but it makes me wonder if I'm being an effective coach.

**Feedback:** What kind of feedback would be of greatest value to you?

How can I help him adjust his lens, develop his leadership agility with respect to Org. Change when he isn't privy to the bigger vision and strategy of the organization right now? Should we be focusing on Pivotal Conversations instead?