

“Learning Case” Template

Leadership Practice

Client’s First Name: Ed	
Name for This Practice: Business Process Definition for administrative systems including Payroll, Inventory Management, Purchasing, and Scheduling	
Current Behavior	Desired Behavior
Dawn and Ed just do their jobs.	We need to create a system that other people can follow, with job descriptions and goals.
Current Mindset	Desired Mindset
We know what needs to be done.	We have clarity of the desired business outcomes, with increased flexibility for a number of people to carry other's loads.
Primary Action Arena: Leading Change	
Type of Agility: Context setting agility - Creative agility	
Shift in Agility Level: Expert to Achiever?	
Capacities to Develop: Setting direction: <ul style="list-style-type: none"> • Makes needed changes in external relationships (He is aware that he may need to consider his relationship with the franchise and other franchise owners.) • Make changes that improve ST & LR effectiveness Situational awareness: <ul style="list-style-type: none"> • Sees issues, units in larger business context Sense of purpose: <ul style="list-style-type: none"> • Strategic 	
Level of Reflective Action to Develop: Intent - Achieve desired outcomes for the business. Awareness - increased robust capacity to reflect on context, connections and relationships. Seeing the whole system of the business.	

Relevant Background

Client's Role in the Organization:

Founder, Owner

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

For profit family business.

Motivation for Coaching:

Ed is founder, and probably in his early 60s. Dawn is his wife, and active in business, doing the accounting and other office functions. Their son Brandon works as a technician in the business and they want to transition the business to him.

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?

This is a franchise business. Ed bought the franchise for the area maybe 25 or 30 years ago. The industry has become more complex and competitive in the last 10 years. The company is quite small - less than 10 employees. It is somewhat scaleable, but growing staff is a challenge. It is a significant investment to train people, and there is a lot of competition in our area for technical workers. He has a very loyal staff, with a lot of experience. It has been hard to bring on and retain new people.

On the LA Accelerator, Ed rated himself as Achiever, with the following breakdown:

- Pivotal Conversations: Achiever/Catalyst
- Leading Teams: Achiever
- Leading Change: Expert/Achiever.

During our Accelerator conversation, he identified two other practices that he intends to work on. These are not necessarily related to this practice.

First, he needs to restructure the compensation plan to make it more equitable and increase the profitability of the company.

He also sees a need to build a more collaborative team. Currently there is little or no formal oversight of staff, and no collective problem-solving at even a tactical level. He would like to see the entire staff more engaged in understanding and supporting the strategy of the business around technology, products, and growth.

I could have chosen either of these other initiatives for this case study, but decided on this one because he feels the first one is something he is just going to tackle on his own in the next week, and the team building one needs to wait until after the holidays. This effort, business process definition, is coming up in the next few weeks.

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.

I'm not sure if Ed's current level of agility isn't adequate for his current situation. He is clearly an expert in all aspects of his business, and is looking to transition the business to the next generation. Does he really need to become an achiever? How will that help him achieve his retirement goals of leaving a lasting legacy for his family and a successful (financially secure) retirement?

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

I'd appreciate helping find clarity within the LA framework. Where is Ed really at, and what can we focus on that will help him achieve his life goals for himself and his family? What questions can I ask that will help?