

# “Learning Case” Template

## Leadership Practice

<b>Client’s First Name:</b> Lilian	
<b>Name for This Practice:</b> Having more successful conversations with peers.	
<b>Current Behavior</b>	<b>Desired Behavior</b>
<p>I get defensive when my actions are critiqued and I deflect feedback</p> <p>I don’t explore what might be behind other’s viewpoints</p>	<p>Stay open to feedback and look for patterns of behavior that are getting in my way of being an effective leader.</p> <p>Express curiosity about their views and actively listen.</p>
<b>Current Mindset</b>	<b>Desired Mindset</b>
<p>I feel frustrated and feel that everyone is out to undermine me since I have responsibility and no authority.</p>	<p>Influence people more effectively and develop more collaborative decisions.</p>
<b>Primary Action Arena:</b> Pivotal Conversations	
<b>Type of Agility:</b> Stakeholder Agility	
<b>Shift in Agility Level:</b> Expert to Achiever	
<p><b>Capacities to Develop:</b> Stakeholder understanding: Put oneself in other’s shoes and step back to really understand others’ views and what is behind their opinion or position.</p> <p>Power Style: Be more assertive in her power style but without becoming abrupt or harsh.</p>	
<p><b>Level of Reflective Action to Develop:</b> Reflect on the dynamics of interactions and whether the behavior has resulted in the outcomes she desired. Reflect on the business systems and whether the roles, responsibilities and culture are contributing to toxic interactions.</p>	

## Relevant Background

**Client's Role in the Organization:** Medical Director, Behavioral Healthcare Division  
XXX County Department of Human Services. She supervises 12 psychiatric providers,

**Type of Organization** (e.g., for or non-profit, industry): County Government Behavioral Healthcare Agency

**Motivation for Coaching:** To identify areas for improvement as well as having tangible strategies for improving her leadership skills.

**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?

Lillian manages a large psychiatric services program for a large, county government agency. She has been there for 3 years. Due to reorganizations, she has been left with responsibility but not authority. When she raises issues, she believes that her concerns are summarily dismissed and she experiences progressively negative repercussions when she raises issues or concerns.

Lillian has had many unpleasant interactions with her peers when they assign projects to her administrative assistant or require the assistant to cover the front desk when others are available. She has provided excruciating details about her conversations with peers and other administrators that have been challenging and she ends up feeling she has not accomplished what she set out to accomplish and that the other party in the conversation either undermines her or goes to her leadership and gets her supervisor and senior leadership to turn against her. She has also had a number of unpleasant conversations with her supervisor and has then written follow-up emails that are passive-aggressive. Lillian does not see how she may be sabotaging herself in her communication style and provides long explanations about how she is the victim, feels unempowered and frustrated.

Lillian has been very effective at developing processes and protocols but her supervisor reported to me that she while she can sometimes look at systems issues, she has difficulty making decisions and goes into painstaking details and too much information when presenting to senior leadership.

**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.

Over the time I have coached Lillian, I have heard about numerous conversations she has had with various people – her supervisor, peers, admin people that have turned out badly. However, in her descriptions (which get way too much in the weeds) she can't figure out what she did that led to such negative consequences and it is hard for me to figure out whether this is just a really toxic culture or whether she is sabotaging herself. Her supervisor told me that she is perceived as overly critical and harsh and that when people bring issues to her she gets defensive.

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

In writing this up, I realize that I constantly experience Lillian as defensive and always providing explanations about how she is not responsible for when conversations turn out badly. I don't have any clarity on how to be helpful other than asking her to become more self-observant, which has helped her to step back and not act as quickly as she usually does but I don't know whether that has helped her have better outcomes to conversations.