

Phil's "Learning Case" Template

Leadership Practice

Client's First Name: Bob	
Name for This Practice: Preparing for Future Leadership roles	
Current Behavior	Desired Behavior
<p>Bob's power style fluctuates, becoming more passively accommodative with senior reports</p> <p>He is focusing on his department by following his direct manager's input.</p> <p>He is shifting from an individual contributor perspective for self and others.</p>	<p>Balance power style – more receptive 1 on 1, more expressive in leadership meetings.</p> <p>In the moment awareness of systems leadership view with all stakeholders</p> <p>Develop a balanced team focus. Delegate and develop his team</p>
Current Mindset	Desired Mindset
<p>"Water Spider" putting my touch on everything</p> <p>People are individual experts like me.</p> <p>Learn and be mentored by people with more experience.</p>	<p>Innovate and manage a team that will meet the needs of the company as it adapts.</p> <p>People work in a system as part of a team of teams.</p> <p>Seek an even keel by maintaining curiosity without judgment</p>
Primary Action Arena: Growth to prepare for more senior leadership roles	
Type of Agility: Stakeholder and Self Leadership	
The shift in Agility Level: Expert to Achiever	
Capacities to Develop: <p>Focus on self-leadership skills and stakeholder understanding to improve confidence. Develop context and creative agility to stay in balance.</p> <p>Balance power style</p> <p>Pivotal conversations – feedback and crucial conversations</p> <p>Resilient mindset</p>	

Level of Reflective Action to Develop:

At the moment, awareness of the systems and flows of the business.

Awareness of shifting perspectives and simple rules to cope with complexity.

A resilient mindset to make mental shifts quickly and at the moment.

Achiever intent: Achieve outcomes that are important to the business

Relevant Background

Client's Role in the Organization: Sales Director

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

Motivation for Coaching: His company is very development minded. Bob is highly motivated to learn and develop as a leader.

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?

I was initially contacted by Tom, the President of Bob's division following a recommendation by his Vistage chairperson.

Last summer, Tom announced a 36-month plan leading up to his retirement. The coaching plan is to develop Bob and Brian to reach their potential and prepare for possible future roles. Tom, Bob, and Brian have worked together for the past 15 years, and they have a very close relationship.

Tom's plan included hiring a third candidate to round out the team and create options for the succession of his role.

Tom plans to choose his successor in 12 months, work with them for six months, and then step aside and assume the role of advisor, coach, and mentor so his successor can take the lead with his support for the final year.

My coachee, Bob, is the Sales Manager of this family-owned, regional specialty sub-contractor in the construction market. Their traditional market is serving commercial developments, including large scale projects like stadiums, universities. They are well known and respected within their industry for their integrity and capability.

The role of Sales traditionally has been as a bidding department, which hands off work to the internal and field operations. Shifts caused by the pandemic are disrupting the business flow. There is uncertainty about the future needs for work-space vs. remote working style. Bob is participating in the strategic planning process to shift offerings and right-size the company.

I am working with another coach supporting Bob's development (Jennifer) and his counterpart Brian in field operations to prepare them for future succession plans. Bob and Brian have spent their entire working career together with Tom.

Another part of the plan was to onboard a third candidate. Omar began work ten days ago and now has office space next to Bob. His role is in charge of innovation. His background includes leadership at a general contractor who developed some of the largest high-rise developments in the middle east. Also, he has been a leader in a massive developer in the United States. In a short interview, Omar shows Catalyst traits. The recruiter has set Omar's expectations high. Tom has asked me to collaborate with Jennifer and provide Omar coaching.

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.

Bob is a current coachee. Bob and I finalize the action plan early on Wednesday morning, presenting and discussing it with Tom on Friday.

On Monday, there is a meeting to renew the overall coaching plan with Tom, Bob, Jennifer and Tom's Vistage chair, who recommended me as a coach.

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

Question everything, please, focusing on the development plan and the upcoming meetings on Friday and Monday. Also, strategies for coaching this expanding group.