

“Learning Case” Template

Leadership Practice – Andy’s Case #2

Client’s First Name: Sam	
Name for This Practice: Exploring and Validating Assumptions and Judgements in Order to Manage Emotions with More Agility and Resilience	
Current Behavior	Desired Behavior
<ul style="list-style-type: none"> • I’m frustrated and short tempered with my leadership team • I frequently have to get involved in the weeds. This is not what I signed on for when I accepted the CEO job. • I am buckling from my workload and I’m reluctant to delegate • When faced with bureaucratic obstacles (we operate in a highly regulated industry) I react negatively • I question why I am here 	<ul style="list-style-type: none"> • I start conversations by setting context – the “why” – before jumping into full delegation • I only get involved in the weeds when there is an emergency and my involvement is essential. I learn to let go of my need for perfection. I “don’t let perfect be the enemy of good.” This allows me to stay focused on what I really need to be doing. • I slow down and delegate more effectively by matching my ask (the task) with the other person’s motivation and competence. • I pause and test my assumptions before reacting to perceived obstacles. • I pause and reflect on greater context in which my team is working, not just on the particular task at hand • I have a daily practice of acknowledging positive things we/I’ve accomplished in 2020/ this week/ today; I write down what I love and what energizes me about my job and this organization

Current Mindset	Desired Mindset
<ul style="list-style-type: none"> • If I hold myself to very high standards, why shouldn't my team? • My team lacks ambition and competence to get things done in a timely and quality fashion • I'm resentful that my team is always making mistakes and that I have to mop up all the time • I'm reluctant to delegate because I know it will take longer and that I won't get back what I need. Why even bother? • Things here are stuck, ossified, I doubt I can make a difference • I personalize regulatory and administrative obstacles 	<ul style="list-style-type: none"> • I spend more time in inquiry to understand and consider my team's perspective rather than jumping to judgement • Sometimes obstacles are just small bumps and not mountains • I manage my team to outcomes rather than process and outcomes • I lift my team's capacity by slowing down to invest in their development • I delegate more effectively and encourage my team to do the same with their direct reports; I'm okay if everything isn't perfect as long as the most important things get done • I believe I can find a path forward as long as I remember to stay focused on the most important things and reframe obstacles as opportunities
Primary Action Arena: Leading Organizational Change	
Type of Agility: Stakeholder Agility + Creative Agility	
Shift in Agility Level: Expert/Achiever to Achiever	
<p>Capacities to Develop: Stakeholder understanding, a greater ability to slow down and see and feel the world through the eyes of others (direct reports). Taking a more collaborative approach to co-create rather than dictate desired solutions. The ability to become comfortable managing to outcomes. Slowing down to listen and redirect discussions in a positive and productive (i.e. coachable) direction if they get bogged down or wander off topic. Remembering to invest my time in the development of my team.</p> <p>Becoming more agile with power style. Mix it up, use assertive less and accommodative more frequently.</p>	
<p>Level of Reflective Action to Develop: Reflecting in the moment when over indexing on assertive behavior. Become more aware of others' verbal/non-verbal signals of shutting down. Noticing when and where my body signals tension and frustration, take circuit breaking actions that will allow me to choose to act with more accommodative behavior.</p> <p>Ability to stop, reflect, and notice when I'm slipping into a heroic leader mindset and chose to lead differently, if appropriate.</p>	

Ability to become more comfortable with paradoxical or conflicting ideas.

Intent: Achieve strategic outcomes

Relevant Background

Client's Role in the Organization: CEO

Type of Organization Non-Profit, Hospital

Motivation for Coaching: Sam is a highly educated (MD, MBA) 50-year old first time CEO of a century year old community hospital in an urban neighborhood. Sam was hired 4 years ago to transform the hospital from its legacy business model to a new model that will allow rapid and sustainable growth. Sam has a strong growth mindset, he's quick, and knows that there are aspects of his job that he doesn't know. He is also highly motivated to succeed. The coaching was self-initiated.

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?

Sam thought he was hired to lead an organizational transformation only to discover after a few months that he was faced with a turnaround. The hospital's physical plant was deteriorating, the government scaled back its rates for reimbursement, and there was long-term debt that came to light and was coming due in a few years. He also overestimated the team he inherited and spent the better part of his first year replacing key direct reports. Then Covid hit.

Sam is very quick and doesn't have much patience for frustration. At the same time, he's very likable and people genuinely enjoy being in his presence.

He has a weak Board that is used to meddling into the day to day operations – a practice that was encouraged by Sam's predecessor.

Sam has a vision and it comes with risk. It means taking on additional debt to launch a new direction and line of service. If it succeeds, he will have stewarded the organization out of a perfect storm to a positive and growth oriented future. If he fails, the organization may have to sell or liquidate. IF HE DOES NOTHING, THE ORGANIZATION MAY HAVE TO SELL OR LIQUIDATE.

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 chose this case because Sam is in a position to have a positive impact on the lives of hundreds of underserved and/or vulnerable citizens. He also has to make some very difficult and critical decisions about the future direction of the hospital. As a result, the hospital's legacy and hundreds of jobs are at stake. I believe he truly wants to do the right thing for the hospital. When Sam and I discuss vision and long term organizational strategy, he's frequently operating like an Achiever/Catalyst. When it comes to implementing his strategy, he frequently becomes bogged down in the details of how he was frustrated by so and so or because X did or didn't happen. Until the past few weeks, I've been focusing on Stakeholder Understanding/

Pivotal Conversations. As I've been writing up this case, I realize that there may be an opportunity to pivot and focus on Creative Agility/Connective Awareness.

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? What are some clues to explore a different avenue in approaching a particularly complex client case? Am I not seeing some assumptions that I've made that are blinding me? Has anyone encountered a case like this before and how did you proceed? Thank you.