

“Learning Case” Template

Leadership Practice

Client’s First Name: Emily	
Name for This Practice: Increasing Stakeholder Participation and Engagement	
Current Behavior	Desired Behavior
From: I’m comfortable in one-on-one conversations with donors and stakeholders getting advice or solving a problem.	To: Developing a strategic framework and being more deliberate about what I am trying to achieve with stakeholders. I need to create more stakeholder engagement in moving the organization forward and leveraging the willingness of stakeholders to expand the capacity of the organization.
Current Mindset	Desired Mindset
My conversations are often transactional, although they are outcome focused.	See stakeholders as part of the whole system and strategy.
Primary Action Arena: Pivotal Conversations	
Type of Agility: Context-Setting Agility, Stakeholder Agility	
Shift in Agility Level: Achiever to Catalyst	
Capacities to Develop: Strategic Capacity Building and leveraging the stakeholders to move the organization forward	
Level of Reflection Action to Develop: Awareness: Able to reflect in the moment Intent: See and understand the human system underlying organizational systems	

Relevant Background

Client’s Role in the Organization: Founder and Executive Director
Type of Organization: Nonpartisan non-profit organization dedicated to recruiting and supporting servant leaders to serve through politics. Through leadership development experiences, educational programming, and networking events, the organization is building a new pipeline into politics for Americans who have served their communities and country before and who feel called to continue their service by jumping into the political arena.

Motivation for Coaching: Leverage the good will, commitment, enthusiasm and values of the stakeholders (donors, candidates, other supporters) to build capacity and stronger support.

Context/Situation Last year, one of the instructors from the Georgetown Leadership Program put out a request for pro-bono coaching and I did not have any pro-bono engagements at the time and the assignment sounded interesting. Our original engagement was for 6 sessions. The request was for the CEO who was returning from maternity leave and wanted some help re-entering her job and working on boundaries. We began to work together about 6 weeks after she gave birth to her son.

One of the issues we addressed was how to bring her political savvy to conversations with candidates with whom she had a difficult relationship. She felt overly invested in his success and was feeling hurt that he was ignoring her advice. Being a new Mom already made her feel vulnerable and she didn't want to be too vulnerable with candidates.

Towards the end of the engagement, Emily did the Leadership Agility 360. (Don't ask why I didn't think of it earlier...) Because I had done the coaching course over 3 years ago, I didn't do a good job of debriefing with her and now want to bring my newly acquired learning to help her to become more strategic in how she frames the organization and her role in it as well as keeping in mind the strategic framework when she engages with stakeholders.