

Frans - “Learning Case- Jason”

Leadership Practice

Client’s First Name: Jason	
Name for This Practice: Leading upward/key stakeholders	
Current Behavior	Desired Behavior
Very often my conversations with key stakeholders/clients are too detailed with technical information. I lose the audience or ability to influence the situation by providing data that confuses them or they see as unnecessary.	Being succinct and to the point by considering the audience and what they need to know, whilst maintain the integrity of our messages.
Current Mindset	Desired Mindset
I have deep subject matter knowledge and vast experience and these people should have all the facts to ensure quality work and safety.	These stakeholders see this information differently than I do. I need to summarize the key points and allow them to ask for more if needed.
Primary Action Arena: Leading Organizational Change	
Type of Agility: Stakeholder Agility & Context-setting	
Shift in Agility Level: Expert to Achiever	
Capacities to Develop: Standing in Stakeholders shoes and understanding their perspectives. Being able to message key concepts in a succinct and influential way Develop a more balanced power style	
Level of Reflective Action to Develop: Awareness: Robust reflective capacity Intent: Strategic Outcomes orientation	

Relevant Background

Client's Role in the Organization: Head of structural and mechanical welding.
Type of Organization: Marine services, providing technical services and repairs to Nuclear Submarines and Warships
Motivation for Coaching: Seen as natural successor to take over the wider engineering services business at a senior management level
Context/situation: Jason has been with the organization for over 30 years having joined the business as an apprentice teenager. He has vast experience and knowledge of the business, is highly respected for his technical knowledge and ability. He has a great track record of innovation & modernization from a technical standpoint. He has built a strong team of successors as he is considered for his next role. His direct reports respect him and will follow him without question. He has a gap in being influential at the next level despite having built a strong team to deliver consistent high value service to the MOD. He needs to make the move from Expert to Achiever in the short term and to Catalyst in the medium term.
Challenge: Jason is finding it difficult to communicate effectively at the more senior client and stakeholder levels. His conversations are driven by his technical knowledge rather than having a strategic enterprise view and tailoring his messages accordingly.
Feedback: Ideas on how to get Jason to practice the skills and capacities necessary to communicate upwards more effectively, to stand in stakeholders' shoes and see the bigger picture. What am I not seeing or missing?