

“Learning Case” Template

Leadership Practice

Client’s First Name: Theresa H.	
Name for This Practice: Multiple practices (Context – Stakeholder – Creative) in play for a new CEO.	
Current Behavior	Desired Behavior
<p>Context: Improve internal operations (overextending Expert/Achiever) and relations with external groups and organizations (secondary focus on customers and partnerships).</p> <p>Stakeholder Agility: Listen to and consider others’ views while advocating my own view.</p> <p>Creative: Meet with individual members to discuss problems; starting collaborative team dialogs.</p>	<p>Context: Solidify Improving team internal processes and external relations.</p> <p>Stakeholder Agility: Initiate collaborative conversations to candidly examine and resolve differences. Build new muscles with the team.</p> <p>Creative: Lead participative discussions with team members to develop breakthrough solutions.</p>
Current Mindset	Desired Mindset
<p>Achiever (can even step back into expert – as in working 1:1 with leaders but desires to work more collaboratively).</p> <p>Speed and driving outcomes create tensions that overpower her ability to pace and work through the collaborative process.</p>	<p>Catalyst: Theresa has the heart of a catalyst – genuinely desires to create an innovative, inspiring vision and bring people together to transform vision to reality.</p> <p>She has “get out of the gate fast” pressures and self-expectations that coaching is helping her work through.</p>
Primary Action Arena: Leading Team/ Leading Change	
Type of Agility: Context Setting – Stakeholder Agility – Creative Agility	
Shift in Agility Level: Achiever - Catalyst	
Capacities to Develop: Emotional (Self-management, emotional reasoning, and emotional control) Stakeholder understanding: Be able to feel what it’s like to be them in their shoes	

Power style: Balance advocacy and inquiry. (Still can feel a bit binary – this role more than ever with coaching is a great emotional lab for her turn as a leader).

Level of Reflective Action to Develop: Awareness - Ability to reflect in the moment and see the human system. Intent: Develop team and organizational cultures that enables others to achieve and experience satisfaction

Still feels a bit binary – coaching weekly or twice weekly is helping her step back with intention to reflect. In the moment with her team, she seems to be doing a good job listening and stepping back – in coaching, where she feels she can be raw and open – she can voice her frustration and still get a bit defensive in her POV.

Relevant Background

Client's Role in the Organization: CEO Americas (North America and LATAM) – America's represents 80% of the company's global revenues.

Type of Organization (e.g., for or non-profit, industry): **\$120M Bio Tech Company**

Motivation for Coaching: Theresa has been a private client for 2 years as she exited her former CEO role after a global restructure. For the past year, she has worked on her self-leadership agility (personal leadership). We've been working on her comfort with power, influence and overcoming the "production trap" – as lessons learned from her prior role.

We've coached on stakeholder agility in her consultant role and creative agility as she's helped the org navigate new products and ways of working. Theresa has the heart of a catalyst but the behaviors of an achiever – and sometimes stepping back into the occasional expert. Timing is also playing into the pressure as she officially takes over in Q2 of her fiscal year and a need for agreed upon KPIs is due in December. Creates tension between past, present and future.

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?

On Oct 1, Theresa was named CEO of the Americas (US and LATAM) for a market-leading bio tech company. The new CEO is transitioning out and exits January 1. The firm has enjoyed double digit growth for many years as they created the market and lead in their niche. Because of their success, other major global brands are now entering the marketplace.

Theresa has an excellent reputation and track record in the diagnostics space. She joined the firm a year ago as a new business consultant to help the organization ready and prepare for a new innovative product launch. It was an assignment that filled a critical need, leveraged Theresa's external network well, and would let Theresa and the Global Board decide mutual fit to be the CEO successor. Theresa's strategic insight and relationships won over the global CEO and operating board quite rapidly. Her collaborative style, positive demeanor and

incredible business track record was well received. The global CEO and operating board decided to expedite the CEO transition ahead of what the current CEO was anticipating. No one other than the CEO and few global members knew about the potential CEO succession. So, in essence, Theresa has been acting in an “undercover boss” kind of way – seeing many of the challenges and opportunities over the past year. Now as the named CEO, she’s feeling internal pressure to perform rapidly and a need for speed to make changes. Albeit the leadership team and organization have enjoyed great commercial success. They view that they have been very successful to date. Additional context - the former leader was a sales executive turned CEO. His style heavily indexed on commercial growth. He also operated in an insular way – keeping the global leadership at arm’s length. He had little interest in collaboration. As long as the leadership team met their commercial objectives (which they did), the America’s leadership team was not heavily focused on internal operational improvements or fully leveraging client relationships. Theresa had observed some complacency in customer relationships and many internal improvements were needed to maintain their leadership, stave off the bigger competitors entering their space, building a strong internal operation and prepare for more products, innovation, and global expansion.

She has worked with and observed the current leadership team in her consultant role. She’s already anticipating and judging which leaders have the mindset, skillset, and capability to lead at the level she assesses she needs.

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.

Working with a new CEO accelerates so much in a short amount of time - business of the business, business of the team, business of the org, complex expectations, political dynamics of a global org, timing of Theresa having been in the org and have sight into the org - yet need to take time to onboard - as a CEO coach - you need to cover a lot of ground in at a quick pace. It is a perfect time at the 60-day mark to get feedback from my excellent colleagues. This is also a great test case for me on CEO ground zero on listen, learn and be bold approach and working with a leader to pace well and build something elegant and sustainable in the catalyst way.

Feedback: What kind of feedback would be of greatest value to you? All feedback and great questions welcome. Test my assumptions. Helping Theresa navigate the tension between immediacy/now and building an elegant future.