

# Tristan “Learning Case” - Pierre

## Leadership Practice

<b>Client’s First Name:</b> Pierre	
<b>Name for This Practice:</b> Vision-casting for the CDA	
Current Behavior	Desired Behavior
<p>When in group meetings, rarely speaks up unless asked direct question (may direct message me with his input instead... permission seeking)</p> <p>When in small meetings, often gets very technical (often too technical for the audience – zone out, or don’t question)</p> <p>Common to fight fires – helps team – ‘in the trenches’</p> <p>Can display some black/white thinking – ‘it’s the way it is’ – or acting quickly with information without validating/inquiring</p> <p>Transactional quality with stakeholders (deliver business cases for own needs... advocate for fixed budgets... power struggles with central IT)</p>	<p>Cast vision (set direction) – agency in what the future could look like, establish longer term projects that fit within that arc</p> <p>In meetings, modulate how showing up to correspond with audience/intended outcome. Work on influence.</p> <p>Less dichotomy... (either assertive or accommodative stance... either/or)</p> <p>Critical reflection on inputs – validate what hearing, inquire to understand deeper</p> <p>Partnership with peer managers (vs win/lose , resource competition – how can we both come out ahead? )</p>
Current Mindset	Desired Mindset
<p>We need more centralized control under my unit (but my unit should stay separate from central IITS)</p> <p>I can apply exactly what I’ve learned in other organizations</p> <p>I demonstrate my value by how well I know my stuff, how I can support my team on technical challenges, and the clever ideas I brought forward when I started to clean our unit up</p>	<p>Directed curiosity - What is an optimal org structure? Who should I be consulting – and how – to think that through?</p> <p>Strategic view of stakeholder engagement (maybe also + co-creative) - How might I engage with my stakeholders that could build the likelihood we can work towards a vision together?</p> <p>What’s unique about our situation that can be leveraged in a positive way?</p>
<b>Primary Action Arena:</b> leading organizational change.	

<b>Type of Agility:</b> Context setting (setting direction) + stakeholder agility...
<b>Shift in Agility Level:</b> Expert → Achiever
<b>Capacities to Develop:</b>  Situational awareness (see & start acting from larger context; unit positioned within a Faculty, unit positioned with respect to central IT, unit as critical feature of university-of-future)  More agility with power style... expresses opinions 'up', inquires more with stakeholders
<b>Level of Reflective Action to Develop:</b>  Reflective capacity... what need to inquire deeper on? What are some underlying relationships/connections here? What could be a win-win solution here?  Strategic outcome orientation. Long term outcomes, proactive positioning... How <b>could</b> CDA be positioned in the future, and how might we get there? How does achieving my LT goals also achieve others LT goals?

## Relevant Background

<b>Client's Role in the Organization:</b>  Manager, IT & AV – for the Faculty of Fine Arts. Unit he manages is called CDA <ul style="list-style-type: none"> <li>• has 2 supervisor direct reports, ~10 indirect reports. Provides services to the 9 Fine Arts departments.</li> <li>• Audio Visual equip to support curriculum delivery and learning outcomes (depots for lending equip, manage classrooms, etc)</li> <li>• IT to enable curriculum (hardware, software, licenses), tech support, programming</li> </ul> Manager (Pierre) has been in role for 2 yrs – was an external hire.
<b>Type of Organization</b> (e.g., for or non-profit, industry):  Academic institution. 50K students. 4 Faculties. Strongly unionized workforce  **Note – IT is generally managed centrally for the University. However, the unit Pierre manages has stayed embedded in the Faculty given the specialized service required for Fine Arts (including use of Mac hardware vs PC, specialized recording/creation equipment, integration of tech in curriculum, etc). There is some overlap with some elements of IT – though relations between the groups are positive.  **Note2 – within the Faculty, there are a few department-specific depots & tech teams that provide department-specific support, and also more specialized teaching support within the departments. There is some overlap with the Manager's team, and potential for better alignment (people and asset management).

**Motivation for Coaching:**

This is one of my direct reports; there has been no explicit call to be coached. So, although not a coaching client, many coaching moments.

He also managed an area where I don't have technical expertise (though I think have an ok level of general knowledge).

This is new for me to have a competent manager of a technical area like this, and new for Pierre to be in a place where he has the space to actually move into the vision-creation stance.

**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?

Academic institutions are on a pivot point – where change is typically slow and griding, overnight we've moved to almost 100% online education. And though we won't stay that way, the role IT has in the 'university of the future' will be MUCH more pronounced. Here's an opportunity to have a proactive conversation about what we envision for the future. We also have a situation where one of Pierre's supervisors is soon to retire – which will give us some freedom to rethink roles & focus areas (a relatively rare opportunity). Also, the central IT group is going through a 5-year strategic visioning exercise; there's opening for positioning & value-added partnering

Have established a positive relationship with Pierre (he was very nervous with my joining the team (unknown manager, 3<sup>rd</sup> manager in 1.5 years) – which also meant he was reporting to a different role in the leadership team), so there's good work to build on.

And, next week (17<sup>th</sup>), I have booked a ½ day whiteboard session for he and I to think about the future. So, my hope that your feedback & dialogue I can go into that conversation

**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.

My motivation for bringing this case forward is that I'm new in this role (8 months), Pierre is relatively new (2 years), our external context is experiencing a major shift (pandemic + then increased drive for online education), and I'm looking for Pierre to step up to fill the space of vision creation/implementation.

Though an experienced manager, Pierre hasn't needed to do that sort of vision work before (more often has been task-focused; more of a manager-by-expertise). I think the work in front of us requires a solid Achiever mindset from someone in his role.

A challenge here for me too is what is my role in this... what I'm seeing, the IT portion of my purview role should occupy max 10% of my bandwidth, so how is that best allocated?

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

In typing this case I think the feedback I'm looking for is two-fold; both what sort of questions can I hold him to in bringing up a more holistic/future oriented way of relating to the challenges & opportunities in front of us, **and** what sort of stance can I continue to hold with him as my direct report to both give appropriate guidance AND appropriate space?