

# *The Future of Coaching*

## *Final as of May 17, 2018*

### *Case Study: Exploring Coaching Options*

*Authors: Angela M. Airall, MBA and Lucy S. Dubin, PhD*

## **In this article, we gain insights from two seasoned Executive Coaches based on a case study showing divergent approaches in a coaching dilemma.**

A Manager with a global pharmaceutical firm was recently transferred from the New Jersey worldwide headquarters to the European head office in Germany. This is the first international assignment with the firm. It is intended as a developmental opportunity for this high-potential employee who has exceeded business goals with strong results during his three years with the company.

The Manager, Manoel, is intellectually gifted, ambitious, and has an MBA from a top-tier university. He wants to develop his leadership skills in order to move up in the company. Manoel is originally from Brazil. He joined the company through its highly selective MBA-hire program. The two-year post to Germany is to lead a project team in conducting due diligence for a critical acquisition.

Three months into Manoel's assignment, comments are streaming into the Head of Business Development about his work. The tenor is generally negative. Although brilliant, feedback indicates there are issues. During team meetings, one-on-one discussions and in work with peers, he is perceived as arrogant, dismissive and takes credit for others' work. Further, when anyone inquires about the status of the project, Manoel is evasive. Multiple project team members report that he lacks leadership to foster teamwork and technical knowledge on how to lead a project.

The Head of Business Development and the Talent Director, both Germans, are concerned about the remarks. They issue a Request for Proposal to an external coaching network asking for a customized process to help the Manager urgently improve.

Your firm is awarded the mandate. What is your strategy?



Angela M. Airall, MBA

**In this article, we gain insights from two seasoned Executive Coaches based on a case study showing divergence approaches in a coaching dilemma.**



Lucy S. Dubin, PhD

## **COACHING**

### **OVERVIEW**

My response to this RFP is two-fold. I will describe approaches to ensure that this organization is prepared for new leaders transitioning into new roles and focus on specific approaches for coaching Manoel.

For the organizational approach I will draw from two organizing principles in the coaching field:

## **SKILLS TRAINING**

### **THE START**

It is thrilling yet thought-provoking to gain a new contract, particularly when it is a company for which I've not provided services to in the past. And, when the issue that needs to be resolved is claimed as iron clad.

Starting a new contract involves the development of a working relationship with the contracting leader and her/his colleagues. At the initial stage, this can be encouraged when the actual contract is shared, and final agreements are discussed.

## COACHING

- Center for Creative Leadership (ACS Model - Assess, Challenge and Support)
- Dr. Michael Watkins' "First 90 Days" and "Right From the Start"

For the individual approach, I will prescribe proven best practices in executive coaching and draw from Oxford Leadership's reflective inquiry process.

Prior to launching the coaching engagement, there will be preliminary conversations with the Head of Business Development, the Talent Director, Manoel and his direct manager.

### COACHING CONTEXT

Manoel has just completed his first 90 days of an international assignment. He has noticed that many of his tried and true ways of success have not led to the same success he typically enjoyed in former roles. This case study explores the impact of cultural nuances, a best practice coaching approach, the impact of emotional intelligence, best practices in assessment strategy, and leadership outcomes in coaching Manoel.

### PREPARING FOR JOB ROTATION

Manoel spent the last three months of his time in New Jersey preparing for the new role. From a learning perspective, the weeks and months before the job's official start date are precious. Effective leaders can leverage this time to meet with key people, understand their respective agendas and how they fit together. Manoel has the opportunity to gain key insights of "what's the same and what's different" about the head office in Germany. He realized that things would be different and that this assignment would be a pivotal moment in his leadership career.

As he spoke to others who had completed successful job rotations, Manoel knew that an accelerated leadership transition was required.

As a newcomer to headquarters, however, Manoel has had to face a number of challenges he didn't anticipate such as a new and different social and organizational culture, geography, language, and work style. He has had to quickly learn the strategy, goals, tactics and project teams members. While transitions are a time of opportunity with fresh starts and change they are also a time of vulnerability for a transferee who lacks established relationships, and detailed knowledge of the new culture, system and expectations.

### COMMITMENT TO COACHING

My first meeting with Manoel was a *chemistry* meeting via video. I sent Manoel 20 questions, which he could feel free to ask me as a coach and encouraged him to be honest about his assessment of what would be needed for the coaching relationship to be successful. I described the ACS approach to coaching along with my customized method of these steps:

## SKILLS TRAINING

What does this normally include?

- Definition of and understanding of the business need
- Description of the client's expectations
- The actions / steps to address the business need
- Commitments about compensation, time frames and stakeholders
- Milestones to evaluate progress

When a problem is defined by the organization, it is possible (and advisable), to use this early stage in the business relationship for what we commonly call an intervention. Early interactions with the contracting leader involve meetings and discussions wherein reaching a **mutual understanding** of a problem is critical. And, that the definition of the problem be based on quantitative and qualitative data – not just the opinion of a contracting leader. In this case, the Head of Business Development and Talent Director identified and then defined an issue based only on qualitative feedback. As such, this was a key indicator that the problem that supposedly needed to be solved actually needed to be explored and validated.

Further investigation about the nature of the problem was warranted. Staying on track with the client whilst developing a working relationship was potentially tricky. It was necessary to tread lightly in order to develop an enduring relationship yet ardently to define and grasp the problem.

### DEFINING THE ISSUE

While it may seem to be simple, defining a problem in its breadth and depth can be challenging. And, at the initial stages of a contract, it is urgently critical to **test the client's perceptions** before establishing a plan of action. Assessing and articulating the issue is necessary as the problem may be different than what was presented by the contracting leader.

How to do this? **Systematically**. With the blessing of the client, capture, compare and discuss different viewpoints and check assumptions and sources of data. It is possible that what the client initially presented is, in fact, accurate. It is also possible, however, that data can lead to reframing the issue and, therefore, reforming a plan of action. A simple approach for discovering what the client believes is by asking:

## COACHING

- An Inward (self-awareness)
- Downward (examining deeply held beliefs)
- Upward (experimenting with new leadership insights)
- Outward (aligning his purpose, values and vision)

I described to Manoel that he would be required to lean in, dig deep and, by doing so, would emerge a stronger and a more successful leader. I painted a picture of a tough love scenario and told him he would never find a stronger advocate than I, to give him what he needed. My sense was that this was not a situation for a coach who was timid or uncomfortable with sharing tough feedback. I wanted to provide Manoel with a true reality check of what to expect in working with me over the next six months.

One of my requests to the company was that I would have access to Manoel's manager for "check-in" calls and access to HR. This was important to identify ways that the company might have been complicit in his leadership derailment, as is often the case. I needed to ensure that during this coaching engagement, learning took place by Manoel, the project team, and the organization.

I was pleasantly surprised to receive a call from both HR and Manoel that I had been selected as the coach of choice.

## ASSESSMENT

In each coaching engagement, coaches must utilize the appropriate assessment tools, gather data, and interpret their results accurately in planning the coaching engagement. Selecting a combination of assessments helps to:

- Uncover the mental model operating as the coachee's leadership style;
- Assess personality, preferences, learning style, strengths and leadership derailers;
- Pay attention to both quantitative and qualitative data;
- Uncover perspectives across the organization from supervisor(s), peers, team members, key stakeholders and direct reports; and,
- Identify behavioral incidents to use as teachable moments during coaching.

For Manoel, I selected the following assessments:

- The Leadership Versatility Index 360 that identifies overused strengths.
- HOGAN HDS that assesses 11 risk factors that may lead to leadership derailment.
- The Myers Briggs Type Inventory (MBTI) to provide insight on Manoel's preferences as a leader.
- The Fundamental Interpersonal Behavior Orientations (FIRO-B) to assess Manoel's needs for inclusion, control and affiliation.

## SKILLS TRAINING

What is the key issue? →	Who is it a problem for? →	What factors shape the problem? →	What evidence is there? →	Can the issue be reframed based on evidence?
--------------------------	----------------------------	-----------------------------------	---------------------------	--

Digging deeper into the circumstance, one can utilize a range of questions to get at the root cause of a problem along with reviewing data such as HR records, feedback from colleagues, observations from auditing meetings, shadowing Manoel (the Manager) and the like:

Root Cause Questions
What's wrong?
How do you know?
What is not working?
When did things start going wrong?
When did you first notice?
How can it be fixed?
If the problem is eliminated, what will be different?

In essence, it is mandatory to define the problem in order to co-create a plan of action with the hiring client. In this case, if and where the Manoel needs help is the fundamental issue that requires definition. Whether an executive coaching program is the best solution to the problem needs to be determined based on what the problem is with the Manager. Hiring an executive coach is a popular and seemingly easy solution to a multitude of difficulties in organizations. But an easy answer is not always the best one. Where does the Manager most need the help? The answer is the primary driver of the plan of action supported and paid for by the company.

Faced with the presenting circumstances implored the question, "Is **consulting, coaching, training or therapy** the best approach to bring the most ROI to the firm and the Manager?"

## TO COACH OR NOT TO COACH

On behalf of Harvard Business Review, Contu and Kauffman conducted a survey about the executive coaching profession. The results show the rationale that companies use to engage coaches. The top three reasons are:

1. Develop high potentials or facilitate transition – 48%
2. Act as a sounding board – 26%
3. Address derailing behavior – 12%

# COACHING

The results of these assessments are shown below.

## Leadership Versatility 360



The outer perimeter provides the four areas of versatile leaders on opposing sides: Strategic and Operational refers to a leaders' focus and Enabling and Forceful pertains to "how" work is completed.

The black area identifies specific competencies for each.

The red zone indicates "too much focus", the green zone indicates "too little focus" and the white zone is "just the right amount of focus".

## Hogan HDS

Of the 11 leadership derailers, Bold was determined to be the highest risk factor for Manoel. High scorers on Bold:

- Overestimate talents and accomplishments
- May not seek different opinions
- Demanding and overbearing
- Unwilling to admit mistakes
- May blame mistakes on others
- Self-promoting
- Strong sense of entitlement
- No sense of team loyalty
- Overly self-confident
- Bite off more than they can chew
- Unwilling to listen to feedback

These personality descriptors were fully present in the 360 feedback. Hogan provided affirmation for Manoel that we needed to pay attention to Bold as a potential risk.

# SKILLS TRAINING

Further, in the report the opinions of experts are cited about how to select a coach, potential dependencies created in a coaching relationship and the intersection between coaching, consulting and therapy.

This survey data spurs further inquiry as to the differentiators between coaching, consulting, therapy and training. Why is this significant given the case described in this article? Because the root of the problem the Manager is facing and its impact on the company, will structure the **type of intervention** proposed and used by the hired vendor.

With this perspective, it was critical as the representative from the hired vending firm, that I fully comprehend the differences between coaching, consulting, therapy and training and ardently select the best approach for success and ROI to the company for their investment.

So, I pondered, "Where does the client need help?"

APPROACH	FOCUS	IMPACT
<b>Consulting</b>	<ul style="list-style-type: none"> <li>• Focus on company performance</li> </ul>	<ul style="list-style-type: none"> <li>• Increased efficiency and productivity</li> </ul>
<b>Coaching</b>	<ul style="list-style-type: none"> <li>• Focus on individual performance</li> </ul>	<ul style="list-style-type: none"> <li>• Increased awareness of behaviors and impact</li> </ul>
<b>Therapy</b>	<ul style="list-style-type: none"> <li>• Focus on dysfunction</li> </ul>	<ul style="list-style-type: none"> <li>• Increased mental health and well-being</li> </ul>
<b>Training</b>	<ul style="list-style-type: none"> <li>• Focus on new knowledge and skills</li> </ul>	<ul style="list-style-type: none"> <li>• Increased skill set</li> </ul>

Based on the original request from the client, let's now dig deeper into the reasons for executive coaching to determine if it is the most worthwhile approach given the case study.

## When Coaching Benefits

Whilst there are numerous matters where coaching can help, a handful of the top ten are: self-knowledge, communication, impact, influence, goal setting, and partnering. In brief, coaching can effect behavioral changes to improve performance in an organizational setting. The focus of a coaching program can be on one or a number of elements such as:

# COACHING

## **MBTI**

Manoel scored as an ENTP with high preferences for extraversion, intuition (big picture thinking) and perceiving (keeping options open).

As an ENTP, Manoel fit his profile for preferences. He was:

- Highly engaging no matter, the setting.
- Gave his team confidence to ensure project relevance and priority status throughout the enterprise.
- Led by intuition rather than factual data and his instincts on project teams were typically spot on as he always provided his teams with options from which to choose solutions.

Manoel was proud of his reputation as being warm, inspirational, enthusiastic, and an idealist with diverse interest. He was also inventive, innovative, ingenious and imaginative as he facilitated people well. Manoel realized that his inquiring mind was too pronounced in the new organizational culture.

## **FIRO-B**

All of us come to jobs hoping to get our needs met and FIRO-B helps us identify our needs and can infer job fit. FIRO-B offers an opportunity to identify what needs we have for Inclusion Control/Power and Affiliation.

Manoel has a high need for Inclusion. He desires a lot of interaction from others and wants to be included by others in team meetings and social affairs. When he is isolated from others, his needs are not met.

He also has a high need for Control and perhaps Power. In organizations both socialized power (and personalized power (ego driven) exists. It is important to distinguish between the two as companies typically value high Power needs to help get the job done. People with high Control scores typically make good managers as long as they can balance it with allowing others to influence their decision-making.

Manoel also has a high need for Affiliation. He desires harmonious relationships with others and needs to feel accepted by people. People with high need for Affiliation perform best when there is client interaction, when they can share their views and hear the opinions of others. With these three data points, Manoel is faced with a dilemma at the European office. Verbatim data from the LVI 360 infer that Manoel's team has low Inclusion and low Affiliation scores and resist high need for control. This doesn't fuel Manoel's vitality and he will perhaps appear desperate if he tries to seek out Inclusion, Control/Power and Affiliation to satisfy his needs.

# SKILLS TRAINING

## **1.Enhance Leadership Competence**

Build leadership competencies, e.g., leading people, business partnering, driving change, organizational and political savvy.

## **2.Broadening Perspective**

Expand understanding and competence to deal with complexity especially in a VUCA business environment.

## **3. Improve Relationships**

Gain interpersonal capabilities to improve interactions, collaboration, communication, conflict resolution, valuing diversity.

## **4.Establish New Behaviors**

A coach can provide objective compassion and support changes in behavior over time and facilitate feedback from others to adapt one's own behavior.

## **5.Clarity Values**

Clearly define and attune to one's purpose and integrity then consistently demonstrate one's values in one's actions.

Coaching can help a client to improve professional performance, but it must go **beyond a quick fix**...rather coaching can help the client to accelerate their effectiveness by ultimately improving their performance and sustaining it **over time**.

Given these fundamental reasons to utilize coaching, it was even more important to define the root of the issue and select the most prudent approach for solving the problem. Suggesting the wrong solution for the wrong reason can be a waste of time for everyone involved. Providing the wrong solution could create harm to the organization and the Manoel.

If, however, coaching is the best path given the circumstances and if the Manager agrees to change and improve, then coaching can work. When a coaching program is successful, the ROI and time-to-value for both the coachee and the company can be enormous.

## **THE PLAN OF ACTION**

As the Head of Business Development and Talent Director's original assessment was based solely on qualitative feedback, this was a key indicator that the problem that needed to be solved actually needed to be investigated and validated.

## COACHING

## SKILLS TRAINING

### COACHING CHALLENGE

While each of these four assessments provide deep insight into leadership behavior, the coach's job is to identify similarities among and between assessments as well as their intersections that will affirm and deepen understanding of leadership behaviors.

In addition to the above assessments, I also assigned the following coaching exercises found in the Oxford Leadership COMPASS model:

- Manoel would develop his leadership timeline identifying successes and failures in his background and look for patterns in his performance;
- He would create an internal compass to better understand his life's purpose, his values and his vision; and,
- He would identify social, political and technical barriers facing him as he made critical choices and decisions facing his future.

Not only did these additional coaching assignments add depth, breadth and reality to our coaching conversations, they prepared him to manage a VUCA (volatility, uncertainty, complexity and ambiguity) world.

While Manoel was processing the data from the assessments, the challenge was to develop a long-term behavioral development plan. The plan should be based on identifying and overcoming his blind spots found during the assessment phase, leveraging the strengths that Manoel brings and addressing some of his career derailers.

The first insight he gained was that people were invested in his success. They provided him with feedback via both quantitative and verbatim data. Whether in an Anglo-Saxon, North American or Latin culture, coaching etiquette now requires him to send a thank you note to each of his respondents. As his coach, I provided Manoel with appropriate language to consider and advised that he highlight one to two areas he will focus on developing. While it was delicate and emotionally challenging to thank people, who recently delivered uncomfortable feedback, this gesture builds leadership muscle and demonstrates maturity and appreciation.

### THE LEARNING CHALLENGE

Climbing the learning curve quickly is essential to successful leadership integration. This includes understanding both the formal and the informal structure of the enterprise. Manoel needed to identify the influencers on his team and at the headquarters site. It was important to understand how decisions were made.

As a consequence, I contracted with the client to revisit the nature of the problem and systematically collect data to guide us in a logical decision about the **best course of action**.

The client agreed to reassess and move forward with digging in to unearth the basis of the problem. The firm's belief in Manoel, along with its two-year investment in an assignment to Germany, were too great to move forward with a fix that was unsuitable.

Utilizing the traditional approach of executive coaching, I reviewed Manoel's data from several personality assessments (MBTI Step II and Hogan HDS) that were available plus the most recent 360-degree feedback results from the USA. Further, I utilized a uniform set of questions (see the list of Root Cause Questions earlier in this article) in confidential conversations with key stakeholders, Manoel, his peers and project members. Additionally, I spoke with the HR Business Partners in the USA and Germany to gain their insights and first-hand knowledge of the situation. I also observed Manoel in project meetings and held several conversations with him both on site and during casual meals.

### WHAT WAS REVEALED?

Coaching was not the best solution for the problem to be solved. Whilst Manoel offered promise and potential, the main issue was not rooted in behavioral gaps. Yes, there were breaches in behavior and misperceptions by colleagues; however, the driving issue was a **major technical skill deficiency**. Manoel was considered brilliant in finance, business negotiations and client facing advocacy, but he had never had formal responsibility to lead a project team nor utilize project management software.

Without advanced expertise with project management tools or knowledge of how to use a project management system, Manoel was floundering. And, he was scared.

Before focusing on performance and leadership behaviors, he simply needed to gain proficiency with the very best tools and apps in order to get his arms around the heavy lifting of project management. Concentrating on coaching to produce behavioral changes and improve performance would not fill in the skills gap he so desperately needed to mitigate.

The data showed that he was superior at zooming out to 30,000 feet to get the big picture, but he needed the tools at ground level to ensure the success of the project team. Software would help him to keep on track with the project and concentrate on leading the project team through immediate project tasks.

## COACHING

He had not considered that meetings at headquarters required negotiations to take place beforehand, and in private. As a new staff member, Manoel had to check these aspects of company culture. Leaders have been able to grasp knowledge quickly, learn to read the dynamics of the organization and then adapt.

### SUPPORT

Creating a leadership development plan requires a coached to pay attention to the 70-20-10 rule. Manoel's learning plan consisted of 70% on the job development, 20% training and 10% coaching. He requested to attend the *Leadership Development Program (LDP)* at the Center for Creative Leadership in Belgium and practice new team behaviors with leaders who did not know him. I also encouraged him to consider attending a public program entitled *Self Managing Leadership (SML)* at Oxford Leadership.

My role during this process was to support Manoel in capturing key insights during this experimentation with new behaviors. It is during this phase that I also pay attention to conversations he is having with his direct manager, Head of Business Development and HR to ensure that he is contracting with them for future success and enrolling them in his continued development.

### LEADERSHIP TRANSITION PLAN

Effective "New Leader Assimilations" equip leaders in transition to accelerate success their new roles. For the next two months, my focus was on delivering proven practices, thought-provoking ideas, tools, and personal action plans to help Manoel quickly develop his effectiveness. The 8-step plan is drawn from Genesis Advisers, founded by Dr. Michael Watkins.

- Preparing for a Successful Transition: Recognizing common transition traps to avoid derailment.
- Accelerating Your Learning: How to absorb information efficiently to speed up the transition process.
- Diagnosing Your Situation: Identifying the type of transition to understand the challenges and opportunities ahead.
- Prioritizing to Succeed: Ways to build momentum for both short- and long-term success.
- Working with Your New Boss: Tips on creating a productive relationship.
- Achieving Alignment: How to coordinate strategy, structure and culture to meet ultimate objectives.
- Building Your Team: Guidance on how to assess team members and processes to build a strong foundation.
- Coalition Building: Developing strategies to establish internal and external coalitions to support initiatives.

## SKILLS TRAINING

Such software enables a leader and project members to keep an eye on details that bring a project to fruition by successfully completing the daily work that needs to be done. For example, the software can automatically reschedule a task when there is a change in the schedule. And, the system can generate reports for Manoel to see if project members have too many or too few tasks.

### CONCLUSION

In this case, coaching does not make sense as Manoel has a technical skill gap that is getting in the way of his daily functioning in his current assignment. **Training will add more immediate value.** After he is up to speed and fully functional in a project management tool and system, then coaching for leadership development can certainly be considered.

Whilst he has a conceptual comprehension of projects along with well-developed business acumen and financial knowledge, Manoel lacks a technical skill that can aid him to succeed as the project leader.

The feedback from project team members describes his lack of leadership competence that, if present, would foster collaboration and his inability to direct a project. These perceptions are accurate in terms of the impact Manoel has on his colleagues. Nevertheless, the observed behaviors are **symptoms stemming from a lack of technical skill.**

To immediately facilitate his improvement, focusing on learning a technical skill will provide Manoel with a tool set that, in turn, will help him to impact the project team in a different way. Without the technical skill, no amount of behaviorally based coaching will increase his technical skill set. Further, with a technical toolkit, he can gain confidence and dispense with his fear. Increased awareness of behaviors and their impact via coaching cannot mitigate his lack of technical knowledge.

Let's take a hypothetical example of building a birdhouse to illustrate the difference between approaches. **Training** can help Manoel learn **how** to build a birdhouse. A **coach** will help Manoel understand **why** he wants to build a birdhouse. And, gives feedback on what Manoel needs to be a successful birdhouse builder. After watching Manoel build a birdhouse, a **consultant** will then tell him **what to change or do differently.** A **therapist** asks Manoel how he **feels** about building a birdhouse and inquires about his history, particularly as a child, with birdhouses.

## COACHING

### THE POWER OF RESILIENCE

CEO Karlin Sloan of Sloan International Group offers this coaching wisdom:

*“What we’ve found time and time again is that the greatest differences in individual resilience comes not from what happens to us, but from how we react to what happens to us. It’s true that some people are born with a set of attributes that naturally move them forward despite setbacks, but it’s also true that we can develop resilience through life experience and through conscious practice”*

My coaching on resilient strategies needed to supplement this 8-step plan, so Giovanni could develop more resilience, with executing his leadership development plan.

### ASSESSMENT DRIVES COACHING

It was evident that Manoel lacked emotional intelligence competencies, which refer to an individual’s personality or emotional makeup. He was not aware that his Bold, ENTP, Controlling/Power motive was a poor fit in the German culture. Together these insights would become the focus of preparing the remainder of the coaching engagement.

Manoel realized that the administrative assistant was the keenest observer of the politics at headquarters and knew who was listened to, respected, and who was ignored. They both agreed to have the administrative assistant decipher coded written and non-verbal messages in the organization and help identify new networks to explore.

While Manoel spent 100% of his time on the project, he realized that the demands of the job far exceeded his expectations. Through coaching, he realized that he needed to expand his network beyond the team and ask: “Who else do I need to know to be effective here?” He arranged interviews with new stakeholders including other managers, peers, and team members who were not on his project team.

Working with stakeholders behind the scenes and contracting with them to shed light on what it takes to be successful is a key ingredient of success. As his executive transition coach, I knew Manoel would need help in preparing for the interviews to establish these key relationships and I provided guidance in discussions pre- and post-interviews to help him capture “lessons learned”, as well as develop a plan of action in how to develop, strengthen, and sustain healthy relationships beyond the project team.

## SKILLS TRAINING

Based on the data, the Head of Business Development and Talent Director agreed that Manoel does not need consulting advice. Nor will coaching help him to change the impact on the project team. Therapy is not in order. What he requires is a specific technical skill that, when acquired and applied, will help to alleviate his fears stemming from not knowing the How To’s of project management; and as a consequence, Manoel can modify the impact on his project members by having the right tool kit with which to lead.

With this plan of action agreed to, Manoel was informed. He was pleased and relieved that he had the opportunity to learn a new system and tools. With his ability to zoom to 30,000 feet, he also appreciated the explicit support from the company for advancing his career. He asked to have not only the formal technical training, but also to have a project member who is an advanced expert in Trello and Basecamp project management tools to tutor him. In exchange, Manoel and the project sponsor agreed to have the project member lead one of the project’s workstreams, as she wanted to gain hands-on project leadership experience.

Six months later, the project is on track. Project members verified that Manoel’s determination and ability to learn the software helped with his confidence and competence to guide the team.

This case study shows that it is imperative to **define the root cause of the presented problem**. There was also a delicate opportunity to forge a business relationship after being awarded the mandate and before jump-starting the activities. To delve too piercingly at the initiation of the project could have caused it to flounder and even terminate. It took educated skill to renegotiate the rationale and direction of the mandate. Nonetheless, by collecting fact-based evidence, the Head of Business Development and Talent Director were convinced that rerouting the focus and plan of action could provide ROI to the firm. If the original direction of coaching had been followed, Manoel could still be struggling, project members further frustrated, and a project headed in a downward spiral.

By assessing and identifying the business and individual needs and creating an appropriate plan of action, a potentially wayward mandate was redirected and produced a ROI for the company, Manoel, the project and team members. Manoel can now utilize the new technical skills and further develop his leadership competence to maximize his potential. Coaching is now in order.

## THE IMPACT OF CULTURE

Culture is the personality of the organization and a leader's personality can be complementary or in conflict with the personality of the organization. Manoel was coached to pay attention to potential landmines and learned how to know when he was pushing too hard on the culture at headquarters. While this was a difficult task based on his personality, he knew he could modify his behavior for this assignment, realizing this required just a temporary change. He was willing to make the change in behaviors, which could catapult him into future success.

### Organizational culture affects such nuances as:

- How meetings are conducted (high structure or casual, time-governed or everyone has a say)
- How formal communications are (e.g., e-mail with or without a salutation)
- Behavior in meetings (competitive participation or mutual affirmation) and what contributions are valued (individual or collaborative)

### 1. Leave the Ego Behind

In the 360 feedback, Manoel learned that he was not viewed as a leader with humility. He was described as a leader with a strong ego. He was missing cues and not learning from his mistakes. For successful professionals with a track record of accomplishing their goals, understanding how to leave the ego behind — and why doing so is important — can be a challenge. Using a coaching journal helped Manoel to reflect on his ego needs.

### 2. Manage Emotions

Over the course of the first 90 days, it was observed that Manoel would close his door and speak louder than others when he was disturbed about the project's progress. The coaching prodded Manoel to explore the science of self-regulation. He learned how to better manage his thoughts and emotions as we discussed:

- How to slow down and think through what he was going to do, such as reflecting on his goals and motivations as well as team goals and motivations
- How to manage his thoughts by asking questions such as, "What am I trying to achieve at this meeting?" or "What do I not know that I need to know?" and "How will I get the answers I need?"
- How to manage his emotions by reframing team situations in a more positive light and engaging in positive self-talk

## BIBLIOGRAPHY

Andersen, E., *6 Ways An Executive Coach Can Make You More Successful*, Forbes, November 20, 2017.

Coutu, D. and Kaufman, C., *What Can Coaches Do for You?* Harvard Business Review, January 2009.

Glover, L., *Know the Difference Between 'Training' and 'Coaching' Employees*, The Business Journals, April 24, 2014.

El Shennawy, F., *Coaching vs. Mentoring, Training, Therapy, Consulting*, Intellect, January 8, 2018

### 3. Practice Reflective Listening

Manoel needed to improve his listening, and practiced as we engaged in the following discussions:

- Helping Manoel learn how to ask better questions — he needed to get into the habit of “asking” rather than “telling” in project team meetings; and
- Helping Manoel learn to take a moment to quiet his mind to develop better focus. We practiced how to ensure he was emotionally quiet, so he could better tune in to his colleagues.

### CONCLUSION

While the risk factors for Manoel’s success lingered, people slowly began to notice that he was trying, and he was resolute in his determination to succeed in this assignment. Not accepting defeat was an important value of his.

As time went on, Manoel learned to modify his behaviors and experiment with a different leadership style. He found ways to use his civic engagements as outlets for his expressive Bold tendency. As he walked in the door each morning, he learned that deep breathing and reframing his tendencies helped him succeed over time.

Manoel liked to share this story as three years later he was tapped for another assignment to Japan. There he would have the insight to know how he could benefit by having a transition coach and the tools to help him learn a new culture.

### BIBLIOGRAPHY

Alan Graham, Ph.D., Kevin Cuthbert, and Karlin Sloan Lemonade: “The Leaders Guide to Resilience At Work” Copyright © 2012

Bacon, Brian, Oxford Leadership - “Self-Managing Leadership (SML)” Program Copyright © All rights reserved

Evelyn Orr, Dee Gaeddert, “Career Playbook: Practical Tips for Executive On Boarding,” Korn Ferry Institute, 2012

Genesis Advisers – Boston, MA.

Kaiser, LeBreton and Hogan, “Dark Side Personality and Extreme Leadership”, Applied Psychology, © 2013

Kaplan, R. and Kaiser R. “Stop Overdoing Your Strengths”, Harvard Business Review, © February 2009

Nam quis nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vestibulum id lorem eget turpis commodo commodo. Duis imperdiet vestibulum ante.

## COACHING

Kaplan, R. and Kaiser R., “Developing Versatile Leadership”, MIT Sloan Management Review © 2003

Leadership Versatility Index, version 4.0

U.S. Patent No. 7,121,830.

© Copyright 2012-2018 by Kaiser Leadership Solutions, LLC. All rights reserved.

Riddle, D., “Executive Integration Equipping Transitioning Leaders for Success”, Center for Creative Leadership. ©

Schell, E., and Hammer, A., Introduction to FIRO-B® Instrument in Organizations Introduction, CPP Inc.

Schnell, E., Participating in Teams, CPP, Inc.

Waterman, J. and Rogers, J., Introduction to the FIRO-B® Instrument, CPP, Inc.

Watkins, M., The First 90 Days: Critical Success Strategies for New Leaders at All Levels, Harvard Business School Press, Boston MA, © 2003.

## SKILLS TRAINING

Nam quis nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vestibulum id lorem eget turpis commodo commodo. Duis imperdiet vestibulum ante.

## COACHING

Watkins, M., Three Pillars of Executive On-Boarding, retrieved from [http://www.talentmgt.com/articles/the\\_three\\_pillars\\_of\\_executive\\_onboarding](http://www.talentmgt.com/articles/the_three_pillars_of_executive_onboarding).

## SKILLS TRAINING

Nam quis nisi. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vestibulum id lorem eget turpis commodo commodo. Duis imperdiet vestibulum ante.