

Module: Coaching Skills

Case Study

Case #1: Laura as Project Lead

The Scene

Technically speaking, Laura is one of the best people on your team. She is highly competent at what she does and is one of the most motivated and focused people you have ever worked with. Laura has been a key player on numerous project teams, and on many you have regarded her as your “number two.” She knows what it takes to complete the types of projects you do, is respected by her peers, and always has great ideas and approaches that help your projects surpass their goals.

As a result of Laura’s success, about a month ago, you decided to make her team-lead for the next project. You informed her of your decision and told her that although you would be a member of the team, she would be leading it—the goal being that after this project you would start to pull yourself completely out of the process. You then met with her about a week later to go over the project plan that she had created. You let her know that her approach was excellent, and you have no doubt that she was on her way to overseeing a successful project.

During the first two team meetings, a problem has arisen—the meetings are dreadful and, for the most part, a waste of time. There is no agenda (written or otherwise) and in addition to starting late, Laura has not been clear about what it is that she hopes to accomplish during the time that she has the team together, so people leave the meeting unclear of their next steps or responsibilities. Laura is apparently unphased by any of this and is following her project plan “to a T.” You know you need to have a conversation with Laura about the meetings, and you are just beginning to think about how to proceed.

The Questions

1. Is this a situation that calls for coaching?
2. How would you structure the conversation?

The Response

1. Is this a situation that calls for coaching?

The first question to ask oneself is: Is this about Aptitude, Attitude, or Available Resources?

In this case, the question is about Laura's Aptitude in planning and running a meeting. Laura has the project management skills, but has no experience in conducting an effective meeting. This is not a situation for coaching, but rather for teaching. Laura needs to be taught some basic techniques for leading a meeting, and then perhaps help in implementing those techniques.

2. How would you structure the conversation?

A. Tell Laura you want to check in on how the project is going.

B. Ask her how she thinks everything is progressing.

C. If she brings up the topic of her dreadful meetings, ask her if you can give her some feedback and go to E.

D. If she doesn't bring up the topic of meetings, reassure her that you think her technique and plan are solid and then ask her if you can give her some feedback.

E. Tell her your intent is to see her succeed and a way to do that is for her to make the most of the time she has the team together for meetings.

F. Teach her about setting meeting objectives, outlining agendas, and assigning tasks with deadlines to people at the meeting.

G. Ask her if she has any additional thoughts about how she might make the most of her meetings.

H. Assure her of your confidence in her as a team lead and in the project.

Case #2: Cole as Cross-Functioning Team Leader

The Scene

Cole is one of your star employees. He's risen quickly and has become a strong player within his own small team. He is ambitious, assertive, and can think outside of the box. He knows what it takes to lead a successful project team, and has done so many times. He is respected by his peers, as well as others in the company who want to duplicate his systems. His work is even beginning to gain the attention of the senior management team.

As a result of Cole's success and your desire to help him grow and develop, you assigned him to a new type of project: Leading a cross-functional project team, of which some members are more senior. You told Cole the good news. Surprisingly, he wasn't as excited as you had expected. However, he said that he'd gladly take on the new challenge and wouldn't fail. He requested that you meet with him later in the week to go over his project plan—a request that you found a bit odd, given his large amount of experience. As usual, the plan was well thought out; you let him know that he was on his way to leading another successful company project. You also let him know that you'd be attending the first few meetings as his support, but would eventually turn it completely over to him.

The first two meetings went well. Cole presented a clear agenda, defined roles succinctly, and ensured that everyone knew the objective and expectations of the project. However, at the third meeting, you noticed that when challenged, Cole deferred to the senior members of the team, instead of stepping up or taking charge of the situation. Then during the last meeting, a team member senior to Cole asked him to clarify one of his decisions. "Why did you decide X instead of going with Y?" To your surprise, Cole began to back-pedal on his decision (which you thought was a sound one) and ended by saying, "You know, it's fine if we go with Y." Cole left the meeting a little shaken, and you left baffled about what had happened and why Cole wasn't stepping up to the plate like you thought he would.

You know you need to have a conversation with Cole about the project in general, and the last meeting in particular, and you are just beginning to think about how to proceed.

The Questions

1. Is this a situation that calls for coaching?
2. How would you structure the conversation?

The Response

1. Is this a situation that calls for coaching?

The first question to ask oneself is: Is this about Aptitude, Attitude, or Available Resources?

This situation is about Cole's Attitude toward successfully running a new project and leading senior members on the team. Cole has the project-management skills (Aptitude), but is lacking confidence (Attitude) when interacting with, or being questioned by, senior members of the project. This is a coaching situation because it is about Attitude. Cole is holding back and needs to be coached on his confidence level when interacting with senior members on the team.

2. How would you structure the conversation?

A. Tell Cole you want to check in on how the project is going.

B. Ask him how he thinks everything is progressing.

C. If he brings up the topic of the senior members of the team, start coaching him on this topic.

D. If he doesn't bring up the topic of working with senior members of the team, reassure him that you think his skills and planning to date are very good and then ask him if you can give him some feedback and possibly do some coaching with him.

E. Tell him your intent is to see him succeed and a way to do that is to provide the leadership, of which you know he is capable, to every member of the team—even those people more senior to him.

F. Start coaching him on this topic.

G. Assure him of your confidence in him as a team lead and in the project.