



## **Case Study: Team Development and Coaching**

**Meet the 5-person leadership team for a budget office supporting a large federal agency.**

### **The Challenge:**

The Director and another manager had recently departed. The Acting Director expected to be in the acting role for an indeterminate, possibly lengthy period. As an acting director, he was unsure of his authority to lead, yet he had to unify the team, onboard a new member, and keep the ship sailing through the fiscal year's hectic end until a new Director was appointed.

### **Desired Results:**

Coalesce as a leadership team, and ensure each team within the budget office understood key processes so they could work together to meet end of year deadlines.

### **Team Coaching Focus:**

The team made a big discovery at the coaching kickoff, where they reviewed and discussed data from a diagnostic assessment that showed how they viewed their own leadership effectiveness as a team: They were drowning in day-to-day transactional work and they all wanted to be able to empower and delegate more to their staffs.

As a result, they redefined the results they wanted from coaching: Improve collaboration among the leadership team members so they could develop capable talent and efficient processes, and bring in better tools that would liberate them from managing daily operations and allow them to provide more strategic support to Agency leaders.

### **The Coaching Process**

In order to assess the strengths and challenges of the team, we started coaching with a diagnostic instrument that each team member completed. The report provides a composite picture of the team's effectiveness in two dimensions:

- *Positivity* skills focus on the interrelationships among team members; these contribute to trusted relationships on the team and are critical for sustaining high performance.
- *Productivity* skills support the team in achieving results and staying on course to reach goals and objectives.

The Coaching process kicked off with a one-day offsite followed up by several 2-3 hour meetings with the team coach. The initial offsite focused on helping the team members become better acquainted, build trusted relationships, and understand and discuss the diagnostic data. The team prioritized the challenges they wanted to work on in coaching. In subsequent meetings, team members introduced real work issues and the coach facilitated dialogue and introduced tools and models that helped the team discuss difficult issues with open minds and make progress toward their goals.

### **Choices and Actions:**

The team diagnostic assessment revealed several challenges:

- **Alignment:** The team did not agree on mission priorities.
- **Accountability:** The team did not have clear understandings of each division's roles, functions, processes, or interdependencies.
- **Resources:** The team was struggling with resourcing the office. They wanted better ways to select, develop, evaluate, and manage talent, and they needed to develop and deploy better tools and systems to facilitate the work of the Budget Office.
- **Trust:** Leadership team members felt they could improve trust in their own professional relationships.
- **Constructive interaction:** When conflict occurred, team members acknowledged they were avoiding having the necessary conversations to move through it and learn from it.

During the coaching process, leadership team members

- Shared personal stories of positive teaming experiences they had each had, and what made those experiences great
- Defined a Purpose Statement to frame their work together
- Articulated specific behaviors individual team members valued and agreed to practice in order to increase trust. This behavioral "operating system" came to define how they wanted to engage with each other to support the unit's ability to do its best work.
- Deepened professional relationships.
- Practiced acknowledging conflict and engaging in constructive and respectful dialogue about it. Conversations produced meaningful breakthroughs for the team.

- Clarified divisional roles and responsibilities, driving higher accountability and efficiency, while reducing confusion among the staff.
- Used a learning model to review and reflect together on a troublesome core budget process. The reflective dialogue highlighted interdependencies and ingrained patterns that impeded high performance. The team took this reflective practice back to their respective divisions – it helped them embed a culture of learning and improved mission results and processes.
- Discussed staffing challenges, leading to a sharpened focus on talent development as a priority. Selecting and developing top quality people was recognized as key to the leadership team being able to focus on strategic issues and avoid burnout themselves.

### **Coaching Outcomes:**

Over a five-month period, coaching helped this leadership team navigate through a period of uncertainty, without any compromise in quality of service. The leadership team also began to shift out of a reactive, short term focus and adopt a strategic, systemic approach to resourcing their office and improving systems and tools that would help them gain efficiency and drive higher employee engagement. They

- candidly addressed conflict when it came up because they had built a foundation of trust and they had conversational skills to support them.
- accelerated the successful onboarding of the new member of the leadership team.
- improved confusing internal processes and communication, leading to better collaboration and improved service delivery.
- shifted away from handling staffing issues working solo within their own stovepipes, and began collaborating to map out and implement a talent strategy for the Budget Office as a whole.

### **Key Success Factors:**

The team was earnestly engaged in the learning that defines a coaching process. Each team member showed up and made himself vulnerable by acknowledging his own leadership challenges and sharing personal stories. Team members risked having conversations that mattered – they shared the challenges they had with other divisions and they were open to feedback about their own leadership and their own division performance. Everyone was committed to the greater good – improving the Budget Office as a whole, and looking beyond parochial interests.

