Leadership Case Study: Sally and David

MTCR is a leading company in the development and manufacturing of a broad range of custom hardware solutions. The company prides itself and is well known for being refreshingly honest and straightforward in its dealings with customers and employees, and in its ability to deliver difficult projects on time. Sally has been a senior manager at MTCR for four years and leads a team in the custom services area of the company. In a recent 360-degree survey, Sally scored above average (at the 70th percentile) in the competency, Drives for Results. Her report also indicated that her manager, peers, and direct reports saw this competency as a critical one for someone in her position. Some of the written comments in her survey indicated that if she demonstrated and applied this competency more often, it would have a significant positive impact on her success on the job. For these reasons, she’s focusing her personal leadership development over the next year on this competency.

David is one of Sally’s direct reports who has worked at MTCR for more than nine years and whose historical performance has been excellent. She recently assigned David to lead a critical project for one of the company’s most important clients. When Sally had assigned him the project she told him that she wanted to include some stretch goals that would challenge his thinking. One of those was delivering the project on time, which she felt was achievable but wouldn’t be easy. She also made including new approaches to productivity and project management separate additional goals, since delivering projects on time was an area important to her and the entire company. Sally developed a compelling list of the benefits to the company of achieving these goals and shared her documentation with David. Since he would be the project manager she had been careful to involve him in the goal-setting and to gain his commitment to the goals, but made it clear he was to own the project planning and management. She checked in regularly with him during the weeks leading up to the delivery dates. Each time she offered to help on the project if needed, but was assured by him that everything was on track.
Unfortunately, the project came in late and the client was very frustrated. Sally moved quickly to call out David’s missed responsibilities, wanting to be clear to him and the team that she was holding him accountable for his actions. She interviewed David’s teammates to get their understanding of what happened and find out what could have been done to prevent the failure. She’s also spent a good deal of time with David to get his perspective. While having those meetings, she realized she’d not spent enough time reviewing David’s project plans and learned there were several areas that the team completely missed when they first mapped out the project.

David has accepted Sally’s feedback and recognized and taken responsibility for his actions. One of her greatest concerns is how to get David and the team more focused than ever on hitting their goals. Sally has just called a brainstorming meeting with the entire team to come up with new ways to do that. In her email announcing the meeting, she also acknowledged some of her failures in the planning portion of the project.
Leadership Questions to Consider

1. Leaders who are seen as extraordinary at a particular competency regularly display some specific, associated behaviors. These are listed for each of the 16 differentiating competencies in the sections of your guide called, “Behaviors Defining This Competency.” To answer these first two questions, refer to the section in your guide for the competency, Drives for Results.

   Although she generally followed most of the leadership behaviors shown there, which of them standout because Sally was:
   a. clearly demonstrating them through her actions?
   b. not practicing them as effectively as she could have?

2. Your guide also provides lists of linear development ideas for those leaders wanting to fix a weakness or a fatal flaw in a particular competency. These ideas are shown for each of the 16 differentiating competencies in the sections of your guide called, “Developmental Suggestions.” To answer these next two questions, refer to the section in your guide for the competency, Drives for Results.

   Even though Sally doesn’t appear to have a fatal flaw in the competency, Drives for Results, these linear suggestions can still offer her ideas about how she might evaluate and improve her own performance. As she considers her personal development as a leader, which of the Developmental Suggestions has Sally:
   a. been practicing effectively?
   b. not been demonstrating effectively?

3. For leaders with an existing strength in a competency that they want to develop further, the guide provides a list of Competency Companions for each of the 16 differentiating competencies. These “cross-training” ideas are behaviors that are highly statistically correlated with the competency the leader wants to develop into a profound strength. To answer these last two case study questions, refer to the Competency Companion section in your guide for the competency you’ve chosen to develop, Drives for Results.

   Which of those companion behaviors shown:
   a. was Sally employing when dealing with David and his situation?
   b. was not specifically mentioned in the case study, but might be effectively employed by Sally as part of her leadership development plan?
Possible Answers and Leadership Considerations

Following are some of the possible answers and leadership considerations surrounding Sally’s leadership challenges. You will likely find others as you think more about how she might improve her effectiveness as a leader and build her personal development plan. Again, there are no “right” or “wrong” answers here or in your own leadership situations. The objective of this activity is to get you thinking more about how you might apply to your own challenges the leadership research and tools that are available in your Competency Companion Development Guide.

**Question 1—Using the guide section, “Behaviors Defining This Competency”**

a. Although she followed many of the leadership behaviors shown there, which of them standout because Sally was clearly demonstrating them through her actions?
   
   - Lead or champion efforts to increase productivity and goal accomplishment throughout the organization (Sally incorporated finding productivity improvements and project management as key goals of the project, and outlined the benefits)
   - Build commitment in others for their individual and team objectives (she made a point to include David in the goal-setting and to get his commitment)
   - Hold others accountable for achieving results (she moved quickly and openly to hold David accountable for the project)
   - Follow through on assignments to ensure successful completion—don’t lose interest before a project is completed (she held regular follow-up meetings with David to try and ensure the project was on track and the goals would be achieved)

b. Although she followed many of the leadership behaviors shown there, which of them standout because Sally was not practicing them as effectively as she could have?
   
   - Aggressively pursue all assignments and projects until completion (although she did a number of things to make sure the target date was met, she wasn’t as involved as she might have been in reviewing and approving the plans, or following up on them as the project unfolded)
   - Do everything possible to meet goals or deadlines (same as above)

**Question 2—Using the guide section, “Developmental Suggestions”**

a. As she considers her personal development as a leader, which of the Developmental Suggestions has Sally been practicing effectively?
   
   - Make sure the goals are realistic yet challenging (she specifically set up and acknowledged the challenging project goals, gained David’s commitment to them, and they seemed to be realistic at the time)
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- Gain and sustain commitment to project goals (she worked to gain David’s commitment at the start of the project)
- Regularly ask people how they’re progressing in terms of their goals, and ask what you can do to help them achieve or exceed their goals (she did both of these often in her progress meetings with David)

b. As she considers her personal development as a leader, which of the Developmental Suggestions has Sally not been demonstrating effectively?

- Follow up regularly on progress and reinforce any movement in the right direction (although she was checking in with David as the project moved forward, she could have spent more time tracking actual progress against the targets and taking action when the project fell behind)
- Celebrate “small victories” rather than waiting for one giant leap in improvement (having intermediate, smaller goals to celebrate would have served as a warning when those interim goals weren’t being met)

**Question 3—Using the guide section, “Competency Companions”**

a. Which of those companion behaviors shown was Sally employing when dealing with David and his situation?

- Has a Clear Vision of Desired Results (she was clear on her goals for the projects and the benefits they would have for the company if achieved)
- Establishes Stretch Goals (she knowingly established stretch goals and acknowledged to David the challenges of meeting them)
- Assumes Personal Accountability (as she began follow-up efforts to refocus the team on hitting their targets, Sally acknowledged her own failures around the project’s upfront planning)

b. Which of those companion behaviors shown was not specifically mentioned in the case study, but might be effectively employed by Sally as part of her leadership development plan?

- Planning and Organization (being more involved and ensuring better planning takes place at the beginning of each project)
- Anticipates Problems (as part of the upfront planning and the ongoing review processes, carve out time to identify potential obstacles in advance, including how they’ll be managed if they occur)