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, Solves Problems and Analyzes Issues. 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 a project manager and one of Sally’s direct reports. He’s worked at MTCR for more than nine years and his performance has always been excellent. It’s generally known among Sally’s team that David doesn’t have as strong a technical background as most of his colleagues. At the same time he’s also viewed as one of the most innovative and creative members of the team, adept at bringing non-technical approaches to solve problems.

Sally recently assigned David to lead a critical project for one of the company’s most important clients. He had worked on a similar project a few months earlier and developed some unique approaches to solving similar hardware challenges. Sally thought those approaches might also be able to be used here. When Sally had assigned him the project she told him it was because it would require the kind of innovation and creativity she knew he could deliver. She also told him that she wanted to include some stretch goals that would challenge his thinking. Since he would be the project manager, she had been careful to involve him in the goal-setting, but
Leadership Case Study • Solves Problems and Analyzes Issues

made it clear he was to also own the project planning and management. To encourage innovation and some risk-taking, Sally planned several activities over the course of the project that would allow her to recognize creative new ideas, whether or not they ended up as part of the project solution.

Sally had initially requested this client project from her boss, even though it was a somewhat risky assignment. She saw it as an opportunity to help her drive innovation and change within her team. To meet this goal and to help ensure David’s (and her own) success, she’d asked him to add some outside consultants to the team who were known for technical innovations. She even setup the initial meeting, introducing them to David and his project team. Sally kicked off the meeting by stressing the importance of finding and including new approaches in the project. To get them started she also shared some analysis from the KRZ project she’d led before that would help clarify the issues, and led a preliminary brainstorming session to encourage different ways of thinking. She’d also assigned to David’s project team a data analyst who specialized in collecting and evaluating the types of the technical data they would need to assess the potential of proposed solutions.

Sally held weekly progress meetings with David during the final months leading up to the delivery date. She focused the discussions on the project goals and identifying key obstacles and their causes. She and David spent a portion of each meeting looking together at the data that was being collected, analyzing it with software they’d developed for other projects, and generating possible solutions for the larger team to consider. She regularly relied on the learnings she’d gotten during the KRZ 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, Solves Problems and Analyzes Issues.

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, Solves Problems and Analyzes Issues.

Even though Sally doesn’t appear to have a fatal flaw in the competency, Solves Problems and Analyzes Issues, 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, Solves Problems and Analyzes Issues.

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?
   - Encourage alternative approaches and new ideas (she put together a team that had a history of being creative and innovative, and she set up activities to encourage new ideas)
   - Systematically evaluate information by using a variety of proven methods and techniques (working with David during each progress meeting to gather and analyze project data using tools that had been successful before)
   - Clarify complex data or situations so that others can comprehend, respond, and contribute (doing some initial analysis for the team to help frame the issues; working with David during each progress meeting to gather and analyze project data, and come up with potential solutions to problems)

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?
   - Coach others on how to analyze information to solve problems and make decisions (it wasn’t clear from the case that Sally was using the project as a way to train the team members on analyzing the problems and making decisions)
   - Collect data from multiple sources when solving a problem (although the KRZ project might have been a valuable source, she should consider looking at learnings from other projects as well)

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?
   - Generate a list of possible solutions based on the most likely causes (she and David worked regularly in their progress meetings on possible solutions coming from their data analysis)
• Ask your team members for help in solving problems (she put together a varied team of inside and outside contributors that had a history of being creative and innovative)

• Consider the viewpoints of various interested parties (she put together a varied team of inside and outside contributors that had a history of being creative and innovative)

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

• When faced with a complex situation, make a list of information that you will need to analyze it (although she may have done this, it wasn’t clear from the case study that she or David took this important step or demonstrated it)

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?

• Takes Initiative (she took great initiative in volunteering for the project, putting together what seems to be a solid team, and personally kicking off the project)

• Desires to Take on Challenges (initially requesting the project from her boss, even though doing so entailed risks)

• Communicates Powerfully and Prolifically (she communicated often and clearly about the need for innovation—from her choices of team members, to how she initiated the kickoff meeting, to the recognition activities she planned in advance—powerful communication can be just as much, or more, about what you do than what you say)

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?

• Strategic Perspective (she could have used time in the kickoff and other project meetings to highlight the link of this project and innovation to the company’s longer-term goals and differentiators in the marketplace)