



The Coaching Manager – Case Studies

Case Study No.1 - Malcolm

"Malcolm" is in his late twenties and has just moved into a management role. He has been trying to get into management for some years now as he had been getting bored with his old sales executive role. He has inherited the team that he used to be part of and he thinks this will be good for the team as there had been disquiet amongst the team with little respect for the previous manager. Malcolm gets on well with all his team colleagues and he didn't see any problems with them accepting him as their new boss. After all he knew what they disliked about the last manager.

Malcolm started his new role with a team meeting and proceeded to run the meetings as per normal. Sales statistics, customer activity and promotional campaign were all covered, as was a review of the new sales aids. It was if nothing had happened from the old manager to the new.

One team member asked how he was going to change things based on the fact that Malcolm himself had been uncomfortable with the way the team had been run by the previous manager. Malcolm replied that as he was new to the job he wasn't going to change things overnight and that there was a job to be done with sales not exactly going in the right direction. Also the meeting had to finish on time as he had a plane to catch to get to Head Office.

Malcolm's last duty in the meeting was to arrange field visits with each sales rep and dates were duly entered into the diary. Malcolm did explain that he might not be able to keep every field visit date because of meetings and he also intimated that some field visits would only be for a couple of hours because of his need to look at sales figures and business plans. An unheard comment at the meeting end was "No change from the last manager!"

Over the first few weeks, Malcolm kept up regular communication with the team via the telephone but the field visits that he had promised never materialised due to his either being in meetings or at home working on business plans. This caused some frustration with some members of the team, particularly the younger ones. The older sales executives were quite happy in that they were being left "in peace".

When Malcolm finally got round to visiting his reps he concentrated on visiting only a portion of the team, causing some confusion with them as to why some were getting the visits and others weren't. There was a feeling that he was visiting the younger ones who he had an influence over and that he was avoiding the more experienced sales executives. This resulted in some team disquiet as Malcolm was seen in some people's eyes to favour the older sales executives and as a result was being manipulated by them.

What should Malcolm have done to make his transition into management easier for both himself and the team?

1. Sought a coach and mentor. Malcolm was in many ways left to get on with it. In the absence of support he should have been pro-active in seeking out senior manager support to enable him to get through the early days of his management career. Competent senior managers would see that no new managers would be left to fend for themselves during the early days. Sadly, many senior managers expect that putting a new manager on a two, three or four day course with no follow up will turn new managers into superstars overnight. This doesn't happen and new managers should be given either internal support through a "mentor" manager or given some form of external coaching resource.

2. Be vulnerable. This is a big step. Malcolm should have met his team both on a one to one basis and as team in order to discuss how they were feeling about him being the new manager. What are their expectations? Hopes? Fears? He should be doing exactly the same in that he should be expressing his fears, hopes and visions. Many managers go straight into management positions and continue to operate as the previous manager has done because they assume that this is what is expected. The new manager must outline to his or her team what they are hoping to achieve and by what means.

3. Contract. What are his expectations of the way they are going to work together? Malcolm should be managing each and every one of his team's expectations. He should be creating boundaries within which each member can work flexibly. Few managers discuss and agree a working contract with their teams. Once a manager and his subordinates know where they stand with each other and know what each other's expectations are, then a profitable working relationship can commence.

4. Face the Fear! Malcolm was enjoying his newfound fame, and the lure of "important" activities such as Head Office meetings and business planning meant that he moved away from his core task of leading the team. Although it is exciting to move into new areas of work, a new manager must maintain a balance between dealing with Head Office, dealing with customers and supporting and leading the team. Failure to get the balance right will result in pressure in one or maybe all areas!

Finally when Malcolm got back to leading the team, he moved towards the newer, less experienced sales executives and away from the older, more "vocal" and "opinionated" salesmen. He liked the fact that the newer sales execs looked to him for advice and he disliked the fact that the older salesmen continually treated him as a "rookie" and were also continually complaining about the car policy, evening meeting allowances etc. Malcolm should have gone through steps 1 & 2 to avoid this! By showing vulnerability, through highlighting his fears, hopes and aspirations, and by contracting effectively with each and every individual, Malcolm should have been able to interact with each sales executive without fear and trepidation.

Malcolm eventually went through 1,2,3 & 4 and really started to enjoy his management career. He got the balance right between working with Head Office/Senior Management, Customers and leading and developing the team which resulted in his profile being raised within the company overall. He ended up being respected by all members of his team, as they knew where they stood with him together with the fact that he was always consistent in his approach. He also became a great coach.

Case Study No.2 - James

James is in his late thirties and has been a manager for a good ten years now. James had been an average performer in his last role, although some of his business skills are excellent. James is very efficient in that his planning is good both in terms of how he builds and maintains his business plan together with his planning of his time. He is a man who sets himself high standards and expects others to meet these same standards. When members of his team do not come up to these standards he gets frustrated and tends to either shout a lot, or worse, goes to senior management to complain about the "idiots" he has inherited. This behaviour is supported by some of the senior managers although some other senior managers have called into question, James's capabilities in that he seems unable to support and develop his employees.

James's behaviours are having a detrimental effect on team morale. He is simply not trusted. He appears to say one thing to one person and a different thing to another. He also tries to find out what people are up to, or not up to, by skilfully asking questions and catching out the "unaware". He appears not to be able to confront individuals about his concerns and would rather take a "back door" approach to find out what an individual is up to.

Despite all his good time management he does not appear to have time to meet and spend quality time with individuals. He would rather tell people what to do as opposed to taking a coaching approach with them as, "It's easier to tell them what to do, rather than wait for them to come up with an answer!"

All in all, James is losing his team fast. They resent him because although the team is successful, it is down to each of them as individuals and not as a result of his management and leadership (or lack of it!). They are succeeding in spite of him! If the team was more together they would be even more successful and working would be a lot less stressful.

Some senior managers are not happy with James' performance in that his previous good capability rating is now coming into question as a result of his behaviours and the obvious disgruntlement within the team.

How can James save himself and become a "coaching manager"?

Firstly, James has some building of bridges to do! His reputation with his team members is at an all time low and some senior managers are starting to have great concerns about his overall ability. James needs constructive feedback. He will not get it from his team, and if he does he probably will not listen to it and certainly not take it on board, given his attitudes to "staff".

Senior managers need to give James this feedback and they need to ensure that he is aware of the impact and the implications of his behaviours, not just on individuals, but on the business as well. If there are competency frameworks in place, then James's competencies need to be reassessed and downgraded where necessary. Only then will the realisation take place that perhaps he has to change his behaviours.

Once this realisation has dawned on James he has to be open with his team about how he now realises how his behaviours have impacted on the team and the business. He needs to contract individually with each member outlining how they are going to work together and how this will be different from the past. Within this contract James needs to ensure that he is given accurate constructive feedback when he asks for it and that he takes it in the way it is intended. i.e. to help and support him to develop and improve.

James must ensure that he lives up to these agreements as getting the trust of the team back will take time given past experience. One slip and any trust that has built up will vanish - possibly forever!

James will also have to contract with his senior managers and to break perhaps some of the ties he has had with other senior managers. He will have to pay particular attention to those managers who have put up with his coming to them with complaints about the team. He should be coached by senior management, not have his bad behaviours supported.

He also needs to ensure that he gets the balance right between spending time on planning and reviewing plans with spending time listening to and developing his team members. As his strengths lie on the planning side he may need to work on his people skills like rapport building, contracting and coaching. James should build a personal development plan that reflects these particular areas.

All in all, James must let himself be vulnerable. He must face up to reality and change and develop accordingly. Given his past, this may take time, but if he gets support from senior management, re-contracts with his team and maintains that contract, then better things will start to happen for James.

If, though he does not get constructive feedback from his peers or superiors will James ever change?

Case Study No.3 - Jenny

Jenny has been a manager for about four years now and she is very well liked by the majority of her team and by her peers. Her teams have tended to be successful because of her excellent recruitment skills. Her superiors though are concerned that Jenny takes on too much, particularly where the team is concerned. She gets caught up in the everyday tasks that the team have to perform and tends to do a lot for the team members when perhaps she should be delegating more. Senior management would like her to display her talents on more strategic issues rather than get caught up in the everyday tasks. Whenever she does delegate she tends just to pass on tasks to team members without offering much support.

She is seen, though, as someone who does spend time with the individuals in the team and is seen to be a good listener. Jenny does though, tend to get carried away with the office "gossip" and some well intentioned coaching sessions with her team members rapidly turn into unproductive "moaning" or "gossiping" sessions. She has also been accused of "favouritism" in the past, tending to meet more regularly with, and socialise with certain members of her team. This is starting to create factions within the team.

Jenny has some superb talents so how can she develop into an effective and even more productive "coaching manager"?

Firstly, she has recruited a highly capable and apparently motivated team who are being successful. There are certain behaviours that she has to adjust and develop in order to continue developing and growing her team towards being even more successful.

1. She is obviously good at building rapport although she may take this a stage too far in terms of becoming too "friendly" and perhaps not assertive enough. She needs to distinguish rapport from friendliness and needs to ensure that a productive and agreed contract is developed between her and each of her team. The team need to know the boundaries within which they can operate. e.g. If a one to one coaching session is called then it is used to focus in on the individual's objectives both business and developmental and not used as a "gossiping" session. Jenny needs to tighten up her contracting and to be careful of her behaviours.

2. Jenny also needs to develop her knowledge of the "skill/will matrix" and use the appropriate intervention when dealing with each of her team. She needs to know when to delegate appropriately and when to coach, guide and direct. Her approach at the moment appears to be to do everything unless it is a task that she perhaps does not like or is not capable of doing. Jenny must ensure that she delegates and does or abdicate responsibility. Failure to use the correct approach with individuals could result in major demotivation and frustration.

3. She may have to look at either her time management or her beliefs about herself and /or members of her team. When a team member asks for her support on a task that they are actually capable of doing, can she say no, and support them to do it themselves rather than doing it for them? What are the reasons that keep Jenny internally focused within the team, rather than perhaps more strategically focused with customers and the company? Self-belief? Lack of Knowledge or capability? Her senior manager should be supporting her to establish what the exact reasons are and then supporting her to develop her capabilities and confidence in this area.

4. Jenny should take care in being seen to have favourites. She should treat each of her team equally and, as we discussed, above should take the appropriate intervention with them depending on where they sit on the "skill/will matrix" relative to the discussion or task in

hand. Jenny also needs to stop herself being involved in "gossip" and as such needs to start to distance herself from such activities. Her professional standing as a manager will collapse if this is not checked.

In summary, in order to become a more productive "coaching manager", Jenny should:

- Learn and practice the difference between rapport and friendliness
- Build a more sound and professional contract between herself and her team members.
- Work on her time management and beliefs around the capability of her team. She should perhaps work with a coach or seek a mentor from her senior management group.
- Use the skill/will matrix more appropriately.
- Use her good listening skills and ensure one to one coaching meetings have both a business and developmental purpose.
- Avoid favouritism and stop the "gossiping".

Case Study No.4 - Brian:

Brian has been a manager for four years and has been fairly successful. He is a bit of a "loner" in that he does not contribute much at meetings and does not socialise with the other managers very much. He feels more comfortable being with his team than with his fellow managers.

His team like him, as he is very supportive although there is a frustration that his approach is the same with everyone in the team and that he seems incapable of adapting his approach to meet the needs and styles of each of the individuals in the team. Brian is not the most assertive of managers, preferring to take a "laid back", facilitative approach. This has got him into a bit of bother in the past as he has had to put some of his team on disciplinary after some irregularities occurred in terms of the way they were securing business. Brian's team is seen as a team that will do their "own thing" as opposed to following the guidelines laid down by the organisation. A recent survey of Brian's team found that 75% of the individuals in the team did not know the organisation's operational guidelines and that of the 25% who did only half of them adhered to the guidelines. Brian is seen as a bit of an "easy touch" when it comes to discipline. Brian's customers think he is fantastic as he is a good salesman who supports his customers very well indeed. Senior management are beginning to have concerns about his overall capability given the disciplinary record of some of the members in his team.

What can Brian do to become a more effective manager?

Firstly, Brian has to go back and ensure that the operational guidelines laid down by the organisation are understood and adhered to. Brian has never liked rules and as such has used this to "raise his profile" within his team. He likes to be seen as a bit of a "rebel" by his team, although he has kept this quiet from his superiors and fellow managers.

Brian needs to change this aspect of his behaviour as he and his team have already been "bitten" by their lack of rules "adherence". In order to do this, Brian needs to talk to his team on a 1:1 basis and basically, re-contract their roles and how best they are going to work together. Brian needs to ensure that they understand the need for him to be more assertive around the question of rules and regulations. He needs to spell out the potential consequences of the team not operating to the organisation's guidelines.

The fact that Brian is supportive to his team is great although he should be looking to tailor his approach to each of the individuals rather than the "blanket" approach he presently uses. He should look at where each person sits on skill/will matrix and decide what type of "coaching approach" is best for that individual within the context of the discussions he is having with them. He has a good facilitative style and he could benefit from enhancing his skills in this area by perhaps going on a coaching course. Some behavioural analysis study could also benefit him in this aspect. By building in coaching time he will be in a position to continue to support his team but in a much more assertive way than "supporting" them from a distance where he doesn't always know what is happening with each of them.

Brian also needs to raise his profile within his peer management group and with his superiors. He needs to get constructive feedback from this group as to what they perceive his qualities and development areas to be. He should also re-contract with his superiors as regards what their expectations are of him and how best he is going to work with them.

One area he should develop is his assertiveness within the group. He has plenty of good creative ideas but does not feel confident enough to present them to the group. Working with a coach or mentor (perhaps a superior?) would help Brian to overcome these fears.

Case Study No.5 - Julie

Julie had been promoted from trainer to manager and is very ambitious. She had a mixed reputation as a trainer in that she was seen as having excellent knowledge about her subjects although there were doubts about her actual skills. If she ever had any issues with the people she was training, instead of managing and resolving the issues herself, she would always immediately turn to senior management in order for them to personally sort out the situation on her behalf. This caused her to not to be trusted.

On her promotion to manager there was a fear within her new team that she would abuse her newfound power. Unfortunately, the team's fears materialised. Julie immediately held a team meeting and spelt out, in no uncertain terms, how she wanted the team to operate. Woe-betide any person who stepped out of line. She was going to be a "tough but fair" manager and she was going to run a "tight ship" ensuring rules were adhered to and budgets strictly scrutinised. There would be no repetition of the "lax" way the previous manager had managed the team. Results were everything and if any member of the team slacked in the pursuit of results and excellence then disciplinary could ensue.

This left the team in a bit of a "cold sweat". Sure, the last manager had been a bit slack in certain areas but he was fair and just, and had spent time with each individual, coaching and guiding them to success. And the team had been successful in most areas. They just needed to tighten up on a few things. The reaction was that, although they had been aware of their development areas and had been prepared to work on them for the old manager, they were not going to immediately "jump to attention" to what they perceived was an "immature upstart".

The first team meeting was a disaster for Julie. She controlled the show but whenever she wanted input from the team in relation to feedback that was requested from Head Office she got little response and as a result had to concoct the feedback in order not to lose face. Similarly when she held "one to one" meetings with people, she ended up doing all the "telling" as the few questions she asked received little response. Nobody did any wrong but creativity, innovation and feedback all but disappeared.

Julie grew frustrated about the lack of response from her team. She revisited some old behaviours and went straight to senior management to complain that she had inherited a "bunch of duffers" and that she could not believe how the previous manager had been able to get away with recruiting them. She demanded that senior management do something.

The Result?

Julie got a shock! The new senior manager would take no action. It was her responsibility to manage and motivate the team. She had inherited a good team, if a bit slack in some areas. But overall they performed, and were successful. This senior manager has been watching the change and decided to confront Julie there and then over her handling of the team.

How had she contracted her role with the team and with each individual in the team? Had she managed their expectations? Did she know what their expectations were? How were

they feeling about losing their old boss? How did they feel about the new manager? What were their hopes and fears? How were they all going to work together? What did the team / each individual want to achieve this year? What were they good at? What did they need to improve? It suddenly dawned on Julie that she had asked no questions - she had dictated. She presumed that her way was best and it was simpler and easier to tell them what to do than to sit down and take time with each individual. After all they were only employees and she had more important managerial tasks to perform!

The senior manager started to question her beliefs about people and after some skilful questioning challenged those beliefs. "If these beliefs are real then you have no place as a manager and leader of people". Julie thought carefully and admitted that she had taken her dictatorial approach, not because of the lack of time, but because she had feared having to manage conflict, both with her team and with her then superior. When he said "jump" Julie said "how high" because she had feared him. If the team were given the "freedom to choose" and their way was different from the senior manager, she felt that it would look bad on her. She feared that the manager would think that she could not control the team and that the team controlled her. She feared for her position - and she had worked so hard to get promoted!

The new senior manager consoled her, helped her regain her composure and then coached her into finding ways to win over her team. She firstly had to admit to the team that her approach had been wrong and that she had seen the error of her ways. She had to make herself vulnerable and to open up as to why she had acted in the way she had. She had to re-contract with each individual and find out what their needs, aspirations and motivations are, as well as discussing her own. They needed to agree how best they were going to work together and how best they were going to give feedback to each other.

Julie duly did all this, and although the team were sceptical at first, in that they did not trust her, she was true to her word and she kept the contracts that had been put in place. She also contracted with the senior manager who acted as her coach and mentor and this relationship worked well, so much so, that Julie developed rapidly into a fine "coaching manager" whose team was ultimately very successful.

The characters portrayed in these case studies are fictional and do not relate to any one particular individual.

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