



CASE STUDY: Bill Wheatley, Sr. Manager, Information Technology

Situational Context:

Bill has been in an IT management role with a major pharmaceutical corporation for 6 years. He is in a customer facing role, and has received above average performance evaluations consistently. He is now interested in progressing his career, expanded responsibility, and a higher grade level (promotion to a Director). For the past two years, he has been identified as “Key Talent” and as “Ready for Promotion in 12 to 24 months” during the annual Talent Review process. Last year, his manager was moved to another position and Bill was made Acting Director of his group for 4 months. Although he applied for the permanent position when it was posted, a more experienced Director was offered the position as a lateral move and Bill was moved back into his Manager role

Bill is now a bit frustrated because he has not been seeking other positions, and he believes that he was a perfect fit for the Director’s role. He is not clear on why he was not selected for the role other than the feedback that he received during the interview process which was that he needs to work on his ability to “think strategically”.

Tilt, Inc. was contacted by Human Resources and hired to coach Bill for six months. The objective was to help Bill create a strategy to take responsibility for his career aspirations, and also help determine if he is a fit for a higher level position.

Coaching Methodology:

At Tilt, Inc., we typically implement a coaching process including the following:

1) *Review of any previous leadership assessments and performance evaluations (if appropriate).*

Bill had not participated in a 360 assessment for 3 years so we determined that his data was not recent enough. We did review his past 2 performance appraisal documents.

2) *Interview a targeted group of key stakeholders.*

We interviewed Bill’s current manager, his organizational mentor, 2 of Bill’s key direct reports, and 2 of Bill’s primary internal customers/stakeholders with

questions targeted at understanding Bill's overall leadership style, strengths, derailers, and areas for development.

3) Complete appropriate cognitive, behavioral, and/or personality assessments designed for leaders at Bill's level.

We typically recommend the Tilt 360 Leadership Predictor™ for high potentials, and additional assessments if applicable. Last year, Bill's company coordinated a targeted leadership development program for senior leaders focused on helping participants to understand the behaviors associated with companies that implement successful growth strategies. They utilized the Hogan Assessment Series to provide each participant with insight into their own leadership tendencies. For this reason, we recommended that we also assess Bill with the Hogan Personality Inventory and the Hogan Development Survey in conjunction with Tilt. This powerful combination of assessments provides us with the opportunity to better understand a client's personality (HPI), derailing behaviors (HDS), prominent character strengths (Tilt 360 and HPI), and overused strengths (Tilt 360). The result is both quantifiable and qualifiable data to be utilized for both identifying coaching objectives, and creating an impactful development plan.

4) Debrief assessments and work with Bill to develop coaching objectives and a development plan. Focus future coaching sessions on the achievement of that plan.

This part of the process is a collaboration between coach and client. As the coach, we debrief the results of the interviews and assessments by identifying themes and areas of focus that are highlighted through the data collection process. The creation of the development plan is driven by the client; however, the coach provides tools and resources and acts as a sounding board during the process. The result is a comprehensive plan that provides focus for the coaching engagement.

Bill created a comprehensive development plan which is outlined in the next section of this case study.

5) Engage the system in supporting Bill.

During the coaching contract, we engage the client's manager and other strategic partners to support him/her during the process. Bill had a very active mentor, a new manager who was interested in Bill's development, and a Human Resources Business Partner who wanted to provide support as well. Because we were hired by Human Resources, we provided regular updates to both HR and Bill's manager regarding the coaching contract progress. Additionally, we met with Bill's manager at the beginning of the process, once Bill had completed his development plan, and upon completion of the coaching contract. We also met with Bill and his mentor twice during the process to engage her support as well.

Data, Conclusions, and Development Planning Focus:

1) From the combination of interviews and assessments, we learned that Bill has a high level of ambition; an outgoing personality; and strengths in the area of process, detail, and organization. He is well-respected by his manager and direct reports. He is the person who gets things done in IT, but is also the one who can see what is “not going to work” within a situation. He has fared well in his career because of his interpersonal skills, but his high attention to detail may be impeding his ability to see situations from a strategic perspective.

2) Interviewing feedback and assessment results concerning personal drive indicate that Bill could be successful at the next level. Because he is a high performer in his current role, there is a possibility that the organization may be holding him back to a certain extent. He tends to be assigned to the projects that require a high level of project management and subject matter expertise. One challenge that we noticed from the beginning of our engagement is that regardless of how diligent Bill was at delegating responsibilities, his manager tended to assign him to new, more tactical projects. We helped Bill to construct a conversation with his manager to express his desire to be assigned to more strategic opportunities, to clarify his role so that he was not the default for tactical responsibilities, and also to see that some of his responsibilities in the past may have been impeding his ability to think and act strategically. We were able to support Bill in getting exposure to other, more strategic programs and processes so he could exercise and demonstrate strategic thinking.

3) During this contract, our firm was also coaching other leaders in addition to Bill. One trend that we noticed is that leaders in this company typically showed lower levels of adjustment. We believed that the amount of change occurring in this organization was contributing to this trend. Because Bill had been passed over for the previous promotion, his HPI assessment indicated a low level of adjustment, and his Tilt self-assessment was lower than the assessment results from all others, we did conclude that Bill was experiencing a higher level of anxiety regarding the future than he typically would. A big part of supporting Bill was helping him to clarify his values and priorities, and create suggestions for helping him to manage his internal stress.

4) Bill needs to become self-aware that his skepticism may be regarded as a lack of strategic focus or a lack of support for other organizational priorities. This theme showed up in his interviews and also in his HDS. You can also see a correlation to his Tilt results where Bill is lower in the Resilience Meta-Factor. This was the primary area of focus for Bill.

5) Bill’s coaching and development plan included the following:

- **Clarify personal career goals and objectives (personally and with family)**

- **Expand organizational network – informational interviews with leaders from other departments**
- **Stress management**
- **Identify and take leadership for a strategic project initiative – target presentation of output to strategic leaders**
- **Explore global opportunities including researching other cultures and interviewing colleagues who have been on global assignments**
- **Delegate current tactical project responsibilities and clarify role as manager of group**
- **Re-establish relationship with current mentor and solicit on-going feedback regarding presentation of self in work settings**

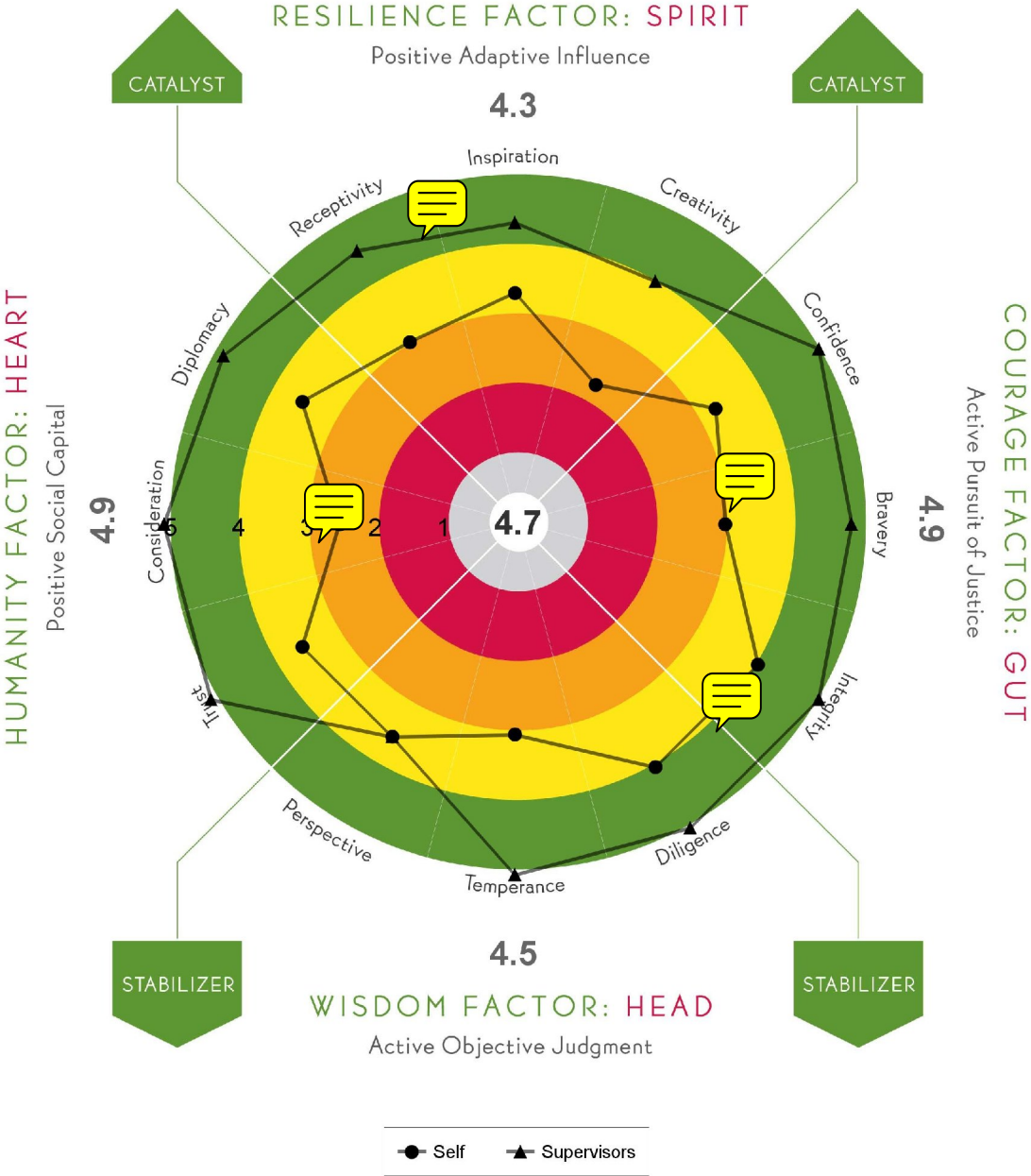
Results:

At the end of the 6 month coaching engagement, Bill had successfully increased his personal network, and had been offered a lateral move into another department. Because he was still seeking a higher level position, he did not take the offer, but was assigned to a global 3 month project and traveled to France for 2 extensive project meetings. He did clarify his career goals for himself and with his spouse. They decided that they did not want a career move away from his current location due to their personal satisfaction with their children's school and neighborhood. He did come to the realization that this may prevent him from being able to take advantage of opportunities in a very wide-spread organization if it required a location change. Bill also successfully completed his strategic project and received great acknowledgement for his contribution to the team as the team leader. Bill re-established his relationship with his current mentor, and also identified a new mentor who he began to meet with on a monthly basis. Bill considered the coaching engagement a huge success, and felt much more grounded with regards to what he was seeking from a career perspective.

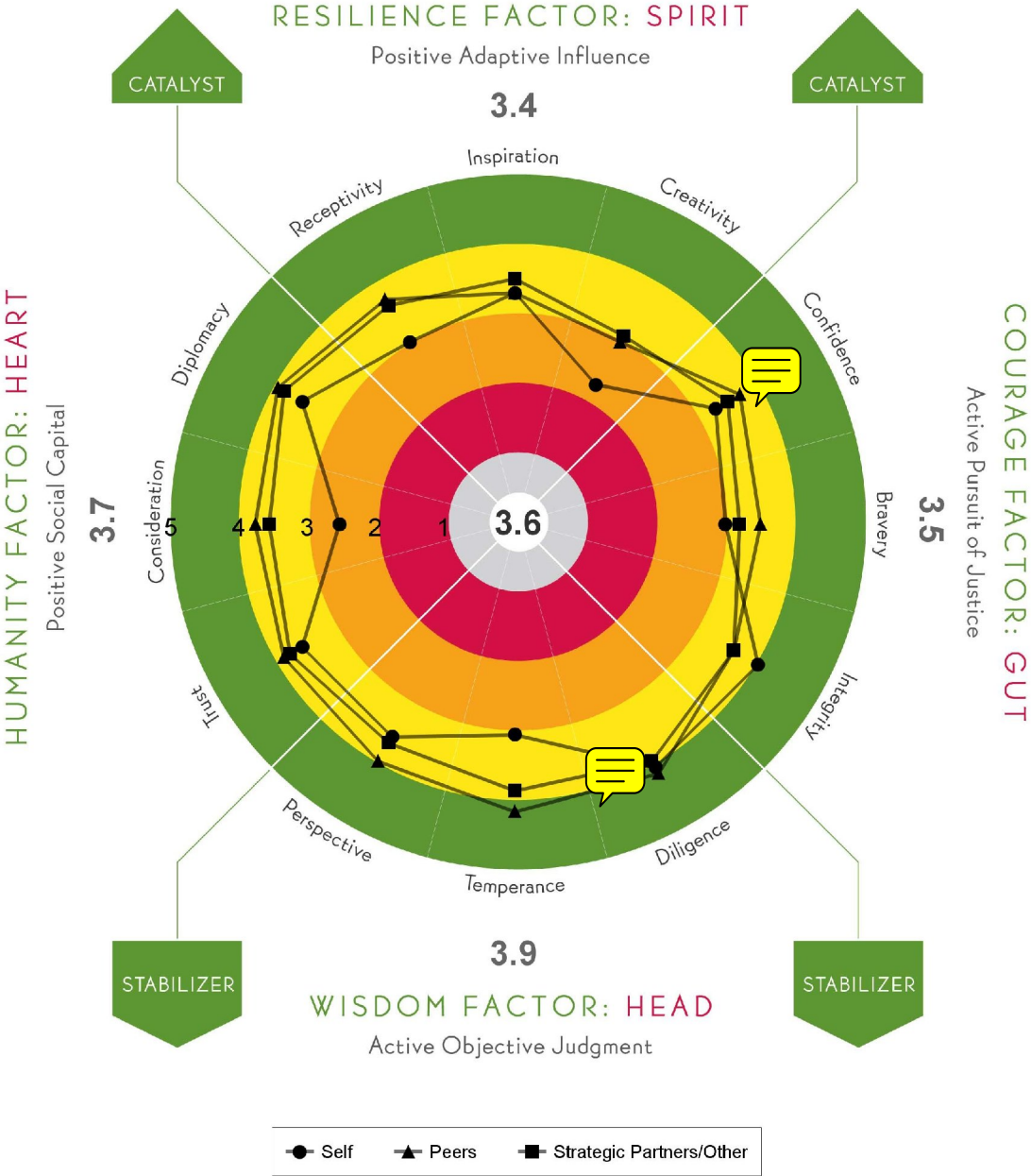


Beth Feild Pisculli, MSOD – Beth is an executive coach, an OD practitioner, and a founding partner of Tilt, Inc. She is passionate about organizational talent and the opportunity to shape the global leaders of tomorrow. Through Tilt, Beth contributes to the suite of assessments and training targeted for the development of Transcendent Leadership. Beth holds a Masters of Organization Development from American University and a Certificate in Business Coaching from Duke University. You may contact Beth through www.tilt360leaders.com.

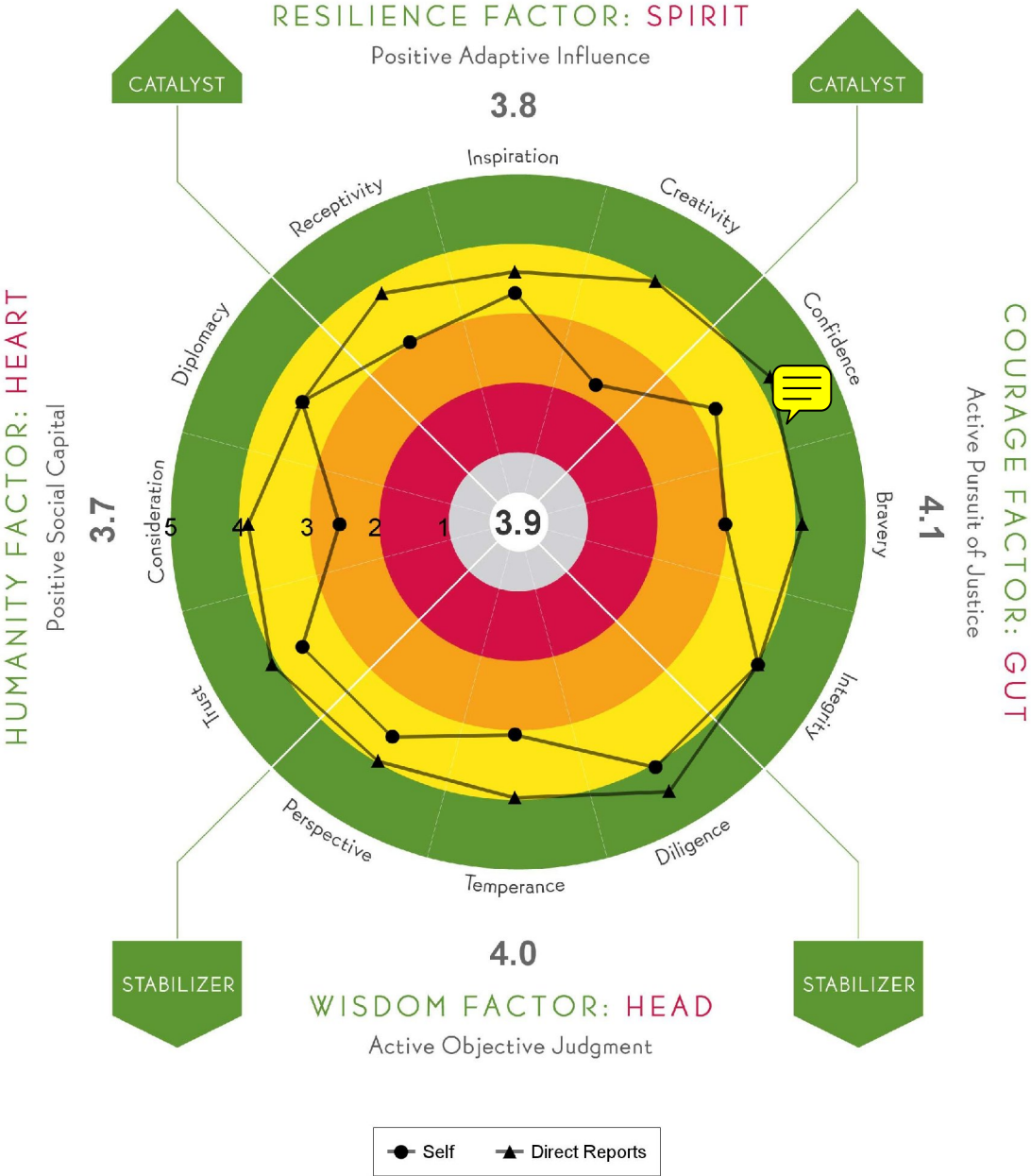
Tilt Leadership Predictor - Self, Supervisors



Tilt Leadership Predictor - **Self, Peers, Strategic Partners/Other**

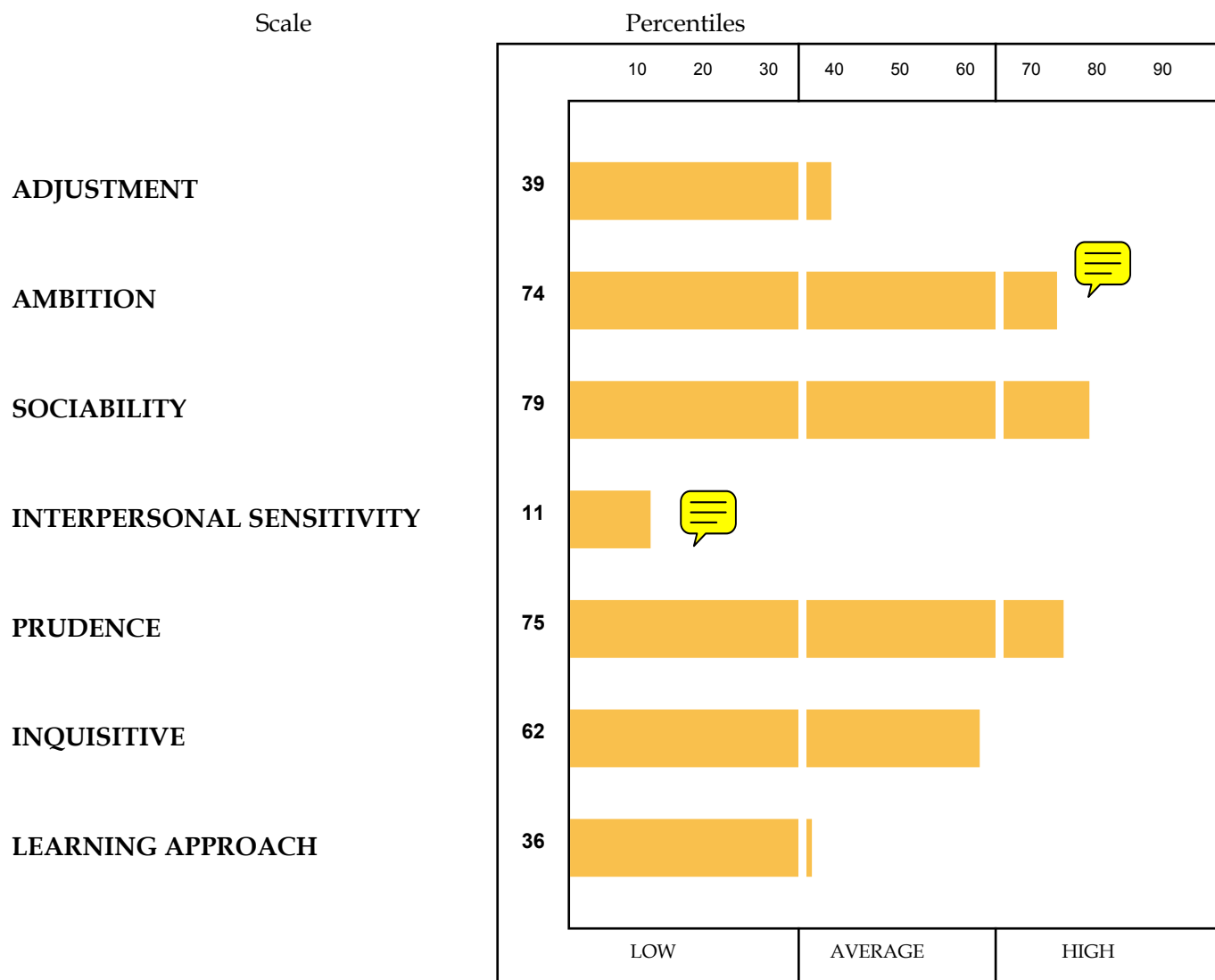


Tilt Leadership Predictor - Self, Direct Reports



L EADERSHIP POTENTIAL PROFILE

This Report is Valid and Interpretable



LEADERSHIP CHALLENGE PROFILE

