

# Case Study: High-Speed Executive Development

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## The Situation

A functional head was identified as the only viable candidate for the Chief Information Officer position for a large pharmaceutical company. The individual was considered to be about 1 year from readiness but the position had suddenly become open. The organization's leadership grappled with whether to promote this individual or go outside to find the new CIO.

## The Decision

Given the employment climate at the time, there was concern that finding a suitable candidate might be too difficult and take more time than the company could afford. The decision was made to promote and then rapidly accelerate the executive's growth and development, as well as fully support their success in the first few months of the new assignment. WJM Associates was hired to deliver its High-Impact Executive Coaching process for the new CIO.

## The High Impact Coaching Process

After discussing the challenges with the head of Human Resources and the CEO, WJM set up an initial meeting with the new CIO to discuss his perspective and the High Impact Coaching process.

### *Phase One:*

The first phase of the coaching work included the following:

- Interviewed key stakeholders to determine criteria for success for the CIO role given current business opportunities and challenges. Gather data on the current culture, current perceptions of the new CIO and those factors that would define a successful start in terms of building credibility, buy-in, and a solid relationship with each of the key stakeholders.
- Planned the Three-Day Offsite designed to rapidly develop the new CIO's skills and abilities in order to successfully move from functional head to the multifunctional, senior role.

It was determined that, historically, the organization's previous CIOs had a hit-or-miss track record with key stakeholders. It was not that systems weren't working adequately, but rather that the style/relationship fit between the CIOs in the past had worked with some of the senior team and not with others. This changed only slightly as people with either IT or financial backgrounds occupied the position. One of the goals for the new CIO was to establish strong "business partner" relationships with each member of the senior team. Not surprisingly, the criteria for success varied with the needs and the style of the stakeholder. This is a common challenge for executives who must build cross functional relationships.

Other goals were specific to the type of visionary leadership that was desired to move the company into cutting edge technology that was practical and affordable. From most of the stakeholders' perspective, the new CIO was technically very competent but there were concerns about his ability to adapt to the varying styles and needs of the stakeholders. Other specific business initiatives were mentioned, some of which would produce internal conflict between functional areas that the CIO would need to mediate.

#### *Phase Two:*

The next phase consisted of The Three-Day Offsite with the CIO and two WJM Executive Coaches.

- Conducted an in-depth assessment of the new CIO in terms of both manifest and latent talents and abilities, as well as potential weaknesses and how to avoid falling into them.
- Communicated key findings from the data gathering interviews and create a focused strategy to equip the new CIO to quickly build or modify relationships with the key stakeholders, incorporating their individual styles.

#### The Three-Day Offsite

The offsite portion of the High Impact Coaching program involved two WJM Executive Coaches and the client in an intensive process which began with an in-depth career/life history. It was discovered that the client had come from a typical background in terms of education for an IT professional and had risen through the ranks due to technical excellence and the respect that this talent had garnered from superiors and colleagues alike. The client's inclusion on a high potential list had been supported for the same reasons. One of the challenges that the client faced was the ever increasing need to move away from both the technical work and the desire to stay current with emerging technologies in a deep way, and to take on the increased challenge of managing the strategy and vision of the organization, developing other leaders and building key relationships.

The assessment process identified both manifest and latent talents, as well as potential weaknesses that the client could fall into. The assessment model used also looked at which talents were most prevalent in each of the following roles:

- individual contributor
- team member
- colleague
- leader
- follower
- decision maker

The assessment further identified strategies to optimize the client's ability to operate in their strengths and to be aware early on if weaknesses were starting to manifest. Beyond this level of awareness, the assessment process also identified other executives' styles that the client would inherently have difficulty with and linked those styles to the functional areas the CIO would need to deal with and with specific individuals based on the interview process.

The next step was to draw from the interview process to identify potential gaps in the CIO's skill sets and to create Role Plays which would give the client an opportunity to rehearse and fine tune several approaches and test them for viability with the styles of key stakeholders. A discussion ensued to further refine the understanding of the stylistic needs of each of the stakeholders and the coaches proposed a list of attributes for each stakeholder to confirm their style and needs.

After completing a sufficient number of Role Plays, the new CIO felt prepared with a strategy for dealing with each of their key stakeholders in a more adaptive style tailored to the needs of the stakeholder.

The last step in the Three-Day Offsite was to create a "return strategy" which covered first contacts with stakeholders including the CIO's team, as well as one-month and three-month goals for building the kind of working relationships that were identified as key goals for the process.

#### *Phase Three (Continuing Coaching)::*

The third phase of the program consisted of bi-weekly, continuing coaching sessions to fine-tune strategies, address new challenges and to continue to assess progress. The WJM Coach and the new CIO re-reviewed the assessment results and reinforced learnings from the offsite. Past successful and unsuccessful efforts for change were explored and possible responses to new, upcoming events were experimented with and practiced.

#### **Final Result**

Both the CIO and the organization agreed that the goal of closing the gap was reached in short order. The new CIO went on to successfully transform the culture of the organization's Information Services Division into a hard-driving, dynamic business culture. Within a year, his team was able to initiate and integrate a new CRM system and a series of application development programs which led to significant efficiency improvements for the company.

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WJM Faculty Member, Dr. Robert Patraw has over twenty years experience assisting organizations and individuals to enhance their success by applying his skills and background to significant leadership and organizational challenges. He is renowned in the areas of executive coaching, assessment, leading change, mission/vision statements, business strategy development and evaluation, team building, communications effectiveness, and organizational design.