

Simulation #1 – Develop in Current Role

“I just want to make a difference in the role I am in.”

Anneta is a mid-career Project Manager. She likes solving problems and keeping things running smoothly. She is happy in her current role and almost universally well-liked by colleagues. Her question for you is, “What else can I do to help?”

You know that she is an asset to the department. Talking with her, you confirm that she isn’t interested in moving into people management or a program management role, but she loves attending training in her field and teaching others what she knows.

Step 1 – Background

1 slide with layers

LAYER 1

Anneta is an experienced Project Manager. She is a strong performer and has been an asset to your department for more than 10 years. She does a very good job keeping projects on schedule and budget, and helping the project team members keep customers satisfied.

She is enthusiastic and easy to like. Anneta enjoys meeting new people and working with customers. The business group has relied on her as a lead project manager for medium and large customer projects for the last five years because she is good with details and with people.

LAYER 2

Anneta has seemed very satisfied with her position. She has not asked for any help with career guidance or expressed any interest in promotion. This coaching conversation came up because you asked about her career goals and she replied, “I just want to make a difference in the role I am in. I love what I am doing now. I don’t want a promotion. What else can I do to help?”

Anneta started her career as a junior systems developer. She took project management training and skills early on in her career. She has been PMP certified for 12 years and loves taking any kind of training, conferences, or seminars to get her professional development units for recertification.

LAYER 3

Anneta handled bigger projects and started working directly with customers more often and enjoyed it. Anneta has been working as a primary project manager for major customer projects for six years.

She is good at handling the complexity of multiple client projects with many “moving parts.” She has difficulty understanding and supporting the reasons for strategic business decisions when those decisions limit her ability to do things the way that she thinks are “the right way.”

Anneta loves to learn anything she can and share it with others. She knows at least a little about a lot of things. She can remember the facts from old projects and things she learned a long time ago.

LAYER 4

Anneta knows so much about so many things that she is resistant to feedback or correction. She becomes very stubborn when someone tells her she is wrong, or suggests a different way to do things, unless that person already has a close relationship with her.

She sometimes displays an “Us vs. Them” mindset. This shows in personal ways, such as, “If you’re my friend, you’re right and we’re in this together.” It also shows as a nationalistic bias: “Why don’t they do this the way we do it here in my country? The way we do this is best.”

LAYER 5

Your current talent profile for Anneta:

- **SKEE:**

- **Skills:** Strong project management and problem solving skills. Good with customers and translating customer needs into technical requirements. Strong interpersonal and relationship-building skills. Good at revenue, expense, and resource management at a tactical or project level.
- **Knowledge:** Very knowledgeable and stays current; she is not a programmer, but she has picked up several programming languages at a basic level
- **Experience:** 15+ years in software and systems development and project management roles in this industry
- **Education:** University degree (bachelor's in the US) in Computer Science, systems and networking specialty, PMP certification (and keeps up with re-certification requirements)
- **IPC:** Fast learner, seeks self-development, can adapt quickly to changes in direction and priority; does not really understand or easily support strategic business realities—the executive level of complexity is beyond her and she is comfortable with that (*Developer note: IPC is Intellectual Processing Capacity; not spelled out*)
- **Temperament:** Her behaviors do not hurt her effectiveness in her current role, but her attitudes about taking feedback and correction from distant others and believing that she knows best would make her less effective in a supervisory or higher level role.
- **Accepts Role Requirements:** Very comfortable and willing to accept current role requirements, but not interested in or willing to take on higher level responsibilities or requirements.

Step 2a – Open the Coaching Conversation (CHOICE POINT #1)

1 slide, 3 choices

2A

- **Starting Text:** *<When you and Anneta meet to talk about her career options and the things she can do to be helpful, you invite her to sit down.>*
- **Best Choice:** I am glad that you are enjoying your current role, Anneta. I would like to see what we can do to keep things going well. You said that you are not currently interested in advancement. Is it okay if we explore this? Where would you like to be in 5-10 years? (Go to 3B-1)
- **Good Choice:** I want to help you stay challenged and satisfied here. You said that you want to make a difference in the role you are in. Are you sure that this will stay the same? Are you still going to be happy in this role in 5 or 10 years? (Go to 3B-2)
- **Poor Choice:** I think you do a great job here, but the fact that you are not planning ahead for your future career worries me. We don't have any big changes planned that would affect your role, but you've got to stay flexible and keep moving ahead. Let's talk about your career. (Go to 3B-3)

Step 3b – Explore the Employee's Career Goal (CHOICE POINT #2)

3 slides, 3 choices each

3B-1

- **Starting Text:** Yes, we can explore this. I like the customer and project work I am doing, and I want to keep doing this. I don't want to be a manager, and I don't want to work on bigger international projects. I like it here in this region. But, I do want to be helpful to the team, also.
- **Best Choice:** You have been very helpful to the team and the company! And, you are always learning new things and sharing what you learn with the team. If you think ahead 10 years and look back at your career, what things would you like to have done? (Go to 3C-1)
- **Good Choice:** It is okay to stay in the same role. All you have to do is to keep up with changing requirements as the business changes. You do very well at most of those things! We should just look at your ongoing development plan. (Go to 3C-2)

- **Poor Choice:** Business changes all the time, you know. It would be smart to be prepared for another role, just in case. You already do a lot of training to stay current. What else could you do to increase your potential? (Go to 3C-3)

3B-2

- **Starting Text:** Yes, I can be happy doing this for a long time, if I can still get training and work with people in the region. I like the customer and project work I am doing, and I want to keep doing this. I don't want to be a manager, and I don't want to work on bigger international projects.
- **Best Choice:** You said that you would like to make a difference in your current role. You are making a difference now! Let's think about the future. As you continue in this role, what things would you want to do to keep making a difference? (Go to 3C-1)
- **Good Choice:** Okay, that is good. It is okay to stay in the same role. All you have to do is to keep up with changing requirements as the business changes. You do very well at most of those things! We should just look at your ongoing development plan. (Go to 3C-2)
- **Poor Choice:** That is okay for now, but you need to prepare for the future, too. You take a lot of training that helps you stay certified. What else can you do to be ready to move ahead, just in case? (Go to 3C-3)

3B-3

- **Starting Text:** *<Anneta seems startled and uncomfortable.>* But, I like what I am doing now. I don't really want to get promoted. I just want to be helpful in my current role.
- **Best Choice:** Yes, it is okay to stay in the same role, and you do a great job! You just have to keep up with changes in the business. You asked about making a difference in your current role. What things would you want to do to keep making a difference? What have you already included in your development plan? (Go to 3C-2)
- **Good Choice:** Do not worry, I am not going to push you to do something you don't want to do. I just want you to be aware of the options. If you want to stay in the same role, and you are sure about that, then we should just look at your ongoing development plan. (Go to 3C-2)
- **Poor Choice:** That is okay for now, but you need to prepare for the future, too. You take a lot of training that helps you stay certified. What else can you do to move ahead? (Go to 3C-3)

Step 3c – Explore the Employee's Career Goal and Assess Talent (CHOICE POINT #3)

3 slides, 3 choices each

3C-1

- **Starting Text:** *<Anneta thinks for a moment.>* I would really like to be the person people go to when they need ideas and help working with customers. I like being an expert in my area and making projects go smoothly. But that is really the same. I would also like to make sure that I can keep getting training and going to conferences.
- **Best Choice:** So, you are in a good role now, and you want to keep learning and working in this role, and being recognized as the expert. You like working with the customers, and training opportunities to stay current are important to you. What else should we think about to help you stay happy in this role? (Go to 3D-1)
- **Good Choice:** That makes sense. People in this area go to you for help with many things. Your 70:20:10 development plan will help you stay current and share that knowledge. I want you to continue that. What might get in the way of your effectiveness? (Go to 3D-2)
- **Poor Choice:** That sounds like a good way to stay up to date in your current role. To make sure that you are prepared for changes in the business, you should add some leadership training, and some help with that stubborn streak people have talked about. (Go to 3D-3)

3C-2

- **Starting Text:** <Annetta shows you her current 70:20:10 development plan.> I have these things on my plan to keep up with technology, and business trends, and some events to stay current on my PMP recertification. And I also have on-the-job activities to share what I learn with team members.
- **Best Choice:** These all look good, and the teaching parts use your expertise to help the team, too. We had talked before about the right mix of project assignments, too. What else would help you stay effective as the business changes? (Go to 3D-1)
- **Good Choice:** People in this area look to you for help with many things. Your training and development plan will help you stay current and share that knowledge. I want you to continue that. What might get in the way of your effectiveness? (Go to 3D-2)
- **Poor Choice:** This looks good for keeping you current. To make sure that you keep up with business changes, you would want some leadership training, and some help with that stubborn streak people have talked about. (Go to 3D-3)

3C-3

- **Starting Text:** <Annetta frowns. This doesn't seem to be going like she expected.> I suppose I could add a couple of leadership courses to my development plan, if you think that would help. Here, take a look at the plan I have now.
- **Best Choice:** These activities all look good, and the plans you have to teach team members would use your expertise to help the team, too. We had talked before about the right mix of project assignments, too. What else would help you stay effective as the business changes? (Go to 3D-2)
- **Good Choice:** People in this area look to you for help with many things. Your training and development plan will help you stay current and share that knowledge. I want you to continue that. Is there anything that might get in the way of your effectiveness? (Go to 3D-2)
- **Poor Choice:** This looks good for keeping you current. To make sure that you keep up with changes, you would want some leadership training, and some help with that stubborn streak people have talked about. (Go to 3D-3)

Step 3d – Explore the Gap for Development and Focus Area (CHOICE POINT #4)

3 slides, 3 choices each

3D-1

- **Starting Text:** It would be great if you can arrange my project assignments so that I have a mix of new and existing customers, and the same for project team members. I like working with people I know, and I like working with new people. And the more I can work with people here in my region, the less interference we have from corporate.
- **Best Choice:** That makes sense. Working with people is a strength for you. I have also noticed that you sometimes complain about corporate initiatives and requirements. That could be a source of irritation or weaker performance for you. Could you help me understand more about what frustrates you about that? (Go to 4E-1)
- **Good Choice:** Right. We are part of a bigger company, and there are always reasons for the requirements. You really don't handle that badly. It seems to me that you just get stubborn and argue about the requirements before you accept them, sometimes. (Go to 4E-2)
- **Poor Choice:** Yes, but that is what corporate does. They are always trying to improve the business. We just need to respond, instead of resisting change. People think that you refuse to listen to anyone that doesn't agree with you. (Go to 4E-3)

3D-2

- **Starting Text:** I know what works with our customers here in this region. The biggest limitation is when corporate tells us we have to do something that doesn't make sense here. I know that I have to just accept that, sometimes. I need to work on accepting it, I guess.

- **Best Choice:** Yes, that could be helpful, especially if people understand your intentions, instead of thinking that you are just stubborn or resisting change. That is something for us to look at on your development plan. What else should we include in the plan? (Go to 4E-1)
- **Good Choice:** Right. We are part of a bigger company, and there are always reasons for the requirements. You really don't handle that badly. It seems to me that you just get stubborn and argue about the requirements before you accept them, sometimes. (Go to 4E-2)
- **Poor Choice:** Yes, but that is what corporate does. They are always trying to improve the business. We just need to respond, instead of resisting change. People think that you refuse to listen to anyone that doesn't agree with you. (Go to 4E-3)

3D-3

- **Starting Text:** <Anneta looks angry.> Stubborn? I am not stubborn! I just know how things work best in this region! We get so many problems and things from corporate to waste our time! It would be better if they just listened to us!
- **Best Choice:** You feel that corporate requirements are often a waste of time, and they don't pay attention to how things work in our region. This may just be a perception problem that you could choose to work on. What else makes sense for you to work on? (Go to 4E-2)
- **Good Choice:** To get them to listen to you, you would have to be seen as an expert that they could rely on for regional advice. The expert part is not a problem; you already do that. You should work on the perception that you are stubborn, and change it so that people at corporate think you are helpful, instead. (Go to 4E-3; this is off-pattern branching)
- **Poor Choice:** Yes, but that is what corporate does. They are always trying to improve the business. We just need to respond, instead of resisting change. People think that you know more than they do, and that you refuse to listen to anyone that doesn't agree with you. (Go to 4E-3)

Step 4e – Commit to Appropriate Action (CHOICE POINT #5)

3 slides, 3 choices each

4E-1

- **Starting Text:** <You and Anneta talk more about her frustration with corporate requirements. She recognizes that her reactions to this could be limiting to her, and she has already included dealing with that as part of her 70:20:10 development plan activities. You verify that these are appropriate and talk about other things for her plan.> Okay, I will find even more ways to share information from these training sessions and conferences with team members. Excellent!
- **Best Choice:** Yes, and I will let the other managers know about the variety of project work that you want to maintain. We also agreed that I will give you feedback as you work on your 70:20:10 plan over time. I am sure you can do this! (Go to 4F-1)
- **Good Choice:** I am happy to help you with this. Go ahead and make the arrangements. I will continue to support your efforts and keep a variety of projects coming to you. When you have questions, just ask me. (Go to 4F-2)
- **Poor Choice:** You should also make sure to address that issue with the corporate requirements, too. They may think that you are resisting change, and you should have a way to change those perceptions. Let me know what you think of. (Go to 4F-3)

4E-2

- **Starting Text:** < You and Anneta talk more about her frustration with corporate requirements. She recognizes that her reactions to this could be limiting to her, and she has already included dealing with that as part of her 70:20:10 development plan activities. You verify that these are appropriate and talk about other things for her plan.> Okay, I have training and teaching and project work listed, plus the part about accepting requirements gracefully. That looks good. Can I move ahead with this plan?

- **Best Choice:** Yes, this plan will help you make the kind of contribution to the team that you asked about. We also agreed that I will give you feedback as you work on your 70:20:10 plan over time. I am sure you can do this! (Go to 4F-1)
- **Good Choice:** Yes, this all looks fine. Go ahead and make the arrangements. I will continue to support your efforts and keep a variety of projects coming to you. When you have questions, just ask me. (Go to 4F-2)
- **Poor Choice:** You should make sure to address that issue with the corporate requirements, too. They may think that you are resisting change, and you should have a way to change those perceptions. Let me know what you think of. (Go to 4F-3)

4E-3

- **Starting Text:** What can I really do about that? I do know what works here, and the people at corporate don't! How can I get them to think that I am helpful? I'm not just going to accept everything that they say we should do!
- **Best Choice:** There are several things you can do to change the perception people have of you. You already have a lot of influence. We just need to help you extend that in this area. *<You and Annetta talk further about some things she can do to change the perception people might have about her temperament. She calms down and seems to appreciate this.>* (Go to 4F-2)
- **Good Choice:** I'm not saying that you should. A technique that might help would be to volunteer to be a regional representative on projects that corporate teams want to implement. If you explain your ideas tactfully, you can win a lot of support. (Go to 4F-3; this is off-pattern branching)
- **Poor Choice:** First, you can control your reactions. That would help. Maybe get some training on that. Then, you can volunteer to critique things that corporate teams want to implement in the region. Just be friendly about it. (Go to 4F-3)

Step 4f – Commit to Appropriate Action (and close the conversation) (CHOICE POINT #6)

3 slides, 3 choices each

4F-1

- **Starting Text:** Thank you, this all seems good! I will put what we talked about into my development plan. This will let me keep learning and doing the kind of work that I love to do. I appreciate your help with this.
- **Best Choice:** You are welcome. I think this will be good! Just to make sure that I understood our agreement the same way you did, would you please summarize what you and I are going to do in an email for me? That way, we can check in and see how this is going next month. I want to make sure that you get enough support, as you need it. (Go to Step 5)
- **Good Choice:** I am happy to help! Please schedule a meeting for us next month to review your plan and see how things are going. I would like to see your plan for sharing what you learn from training and conferences, and I might have feedback for you by then, too. (Go to Step 5)
- **Poor Choice:** Good! You can stay current and be helpful, at the same time. I am also sure that if you can deal with your frustration with corporate, then you will have much more influence, too! (Go to Step 5)

4F-2

- **Starting Text:** Okay, thanks for the help! I am glad that I don't have to push for a promotion or anything, and I will keep working on that development area, too.
- **Best Choice:** And I will tell other leaders about the mix of projects and the training you can offer to team members. Would you please summarize what you and I are going to do in an email for me? That way, we can check in and see how this is going next month. I want to make sure that you get enough support and that I am being helpful to you. (Go to Step 5)

- **Good Choice:** Great! Also, please schedule a meeting for us next month to review your plan and see how things are going. I would like to see your plan for sharing what you learn from training and conferences, and I might have feedback for you by then, too. (Go to Step 5)
- **Poor Choice:** Good! You can stay current and be helpful, at the same time. I am also sure that if you can change the perception that you resist change to people outside of the region, then you will have much more influence, too! (Go to Step 5)

4F-3

- **Starting Text:** *<Anneta frowns, but calms down.>* Okay... thanks. I will revise this development plan and I guess we will see if anything improves.
- **Best Choice:** Go ahead and implement the training and teaching parts that you already had planned. We can look at the newer action items in 2-3 weeks to see if everything still makes sense then. I want to make sure that you get enough support, as you need it. (Go to Step 5)
- **Good Choice:** Send me the plan and schedule a meeting for us to look at that again in a week or so. There might be other ideas, or more specific steps that we can add that you would find helpful or interesting. (Go to Step 5)
- **Poor Choice:** Good! I am sure that if you can change this perception that you are stubborn and unhelpful to people outside of the region, and you prepare for more leadership, then you will be prepared for changes in the business. That will be good for your career. (Go to Step 5; -20 points)

Step 5 – Reveal the Result

1 slide with Layers

- **Text:** (No new text. Everything is revealed with the outcome description and feedback.)
- **Best Outcome (92-100 points):** You achieved the best possible outcome for this simulation!

“Yes, I can be helpful and keep doing what I love to do!”

Anneta left your meeting feeling happy and very encouraged. She appreciated your support for continuing the learning and project work that she liked to do. She also liked that she was not being forced to advance or waste time working on other career options. Anneta also gained a realistic understanding of how her temperament limitations might affect her if she did not manage them. She gained a greatly increased respect for her manager and the company as a result of this conversation.

Because you asked Anneta to summarize your agreement and keep you properly informed, she was also able to easily implement the plan that you had agreed upon. You had the reminder and clarity that you needed to follow up, and she did, also. This made her development activities easier and more efficient to manage than if you had left it up to her or took control of follow-up yourself.

Through the decisions you made in this exercise, you applied the coaching fundamentals properly, and maintained a strong coaching mindset throughout. You consistently asked Anneta to suggest options and evaluate alternatives, instead of telling her what to do. Your choices also demonstrated a consistent confidence in her ability to handle challenges and succeed.

- **Good Outcome (80-91 points):** You achieved a good outcome for this simulation!

“I will just keep doing what I am doing. Thanks!”

Anneta left your meeting feeling happy and encouraged. She appreciated your support for continuing the learning and project work that she liked to do. She also liked that she was not being forced to advance or waste time working on other career options. While she was not enthusiastic about it, Anneta also gained an understanding of how her temperament limitations

might affect her if she did not manage them. She gained an increased respect for her manager and the company as a result of this conversation.

As Anneta worked on the plan, she kept you informed and came to you for assistance. You sometimes had to revisit the plan and re-clarify what each of you would do, but this worked well over the long term.

You applied the coaching fundamentals properly throughout most of the decisions you made in this exercise. You may have made some choices that did more telling than asking Anneta to make her own decisions, or you may have sometimes taken a position that suggested that you were more in charge of his development and career choices than she was. You may have accepted her satisfaction with her current role without probing, instead of exploring how this would work for her in the future. While the outcome was good, it could be better by demonstrating more of the coaching mindset that supports and gives control to the employee.

- **Fair Outcome (65-79 points):** You achieved a mixed outcome to this simulation.

“This coaching stuff did not really help me.”

Anneta left your meeting feeling unsure about whether the conversation had been helpful. She appreciated your support for continuing the learning and project work that she liked to do. She did not feel fully supported in staying in her current role. While she was not enthusiastic about it, Anneta also gained an understanding of how her temperament limitations might affect her if she did not manage them. Her respect for her manager and the company decreased as a result of this conversation.

Anneta filled out her 70:20:10 career development plan, but then she just did the parts of it that interested her. She watched you carefully for signs that you were not happy with her performance, or for any changes in the business that might threaten her job. She did not approach you for help with any of her development plan activities, and seemed to be trying to avoid talking about it. The relationship that she had with you before became much cooler for some time after that conversation.

You got this outcome by inconsistently applying the coaching fundamentals. You chose statements that sometimes showed a lack of confidence in Anneta’s judgment about her career aspirations and behavior. There may not have been a consistent pattern of good or poor choices, but at least some of the statements you selected were focused on telling Anneta what to do, rather than listening to her point of view—contrary to an effective coaching mindset. This outcome represents a missed opportunity for you and the company to develop and use Anneta’s full potential.

- **Poor Outcome (51-64 points):** You achieved a poor outcome to this simulation.

“What are they thinking? This makes no sense!”

Anneta leaves your meeting with no commitment to action, and the belief that you did not really have any interest in helping her get what she wants out of her career. She will go through the motions of making a development plan, but does not believe that the plan will be helpful. Anneta’s respect for you as her manager and the company decreased as a result of this conversation.

Within the next month, there was a dramatic change in Anneta’s attitude toward you and the company. Where she had been cheerful and effective, she became unhappy and withdrawn. Several months later, she resigned. Later, you heard that all of her peers knew that she was unhappy and looking for a new job outside the company. The productivity of your department decreased. You lost several other employees, and some major customers were openly questioning the sales team about whether it was safe to do business with your company.

You got this outcome by choosing statements that did not properly apply the coaching fundamentals. You chose statements that showed a lack of confidence in Anneta's judgment about her own career and behavior. Most of your statements focused on telling her what to do, rather than listening to her point of view. This outcome represents a missed opportunity for you and the company to engage, develop, and use Anneta's full potential.

- **Worst Outcome (< 51 points):** You achieved a very poor outcome to this simulation.

"This was unhelpful, and I think they are trying to get rid of me!"

Anneta leaves your discussion frustrated and unhappy. She believes that you did not really have any interest in listening to her and that you were trying to tell her that she should get ready to be fired. Anneta's respect for you as her manager and the company decreased dramatically as a result of this conversation.

Not only was there no commitment to development, Anneta spread the word that the department was probably going to be eliminated. Her attitude toward you and the company became cynical and resentful. Anneta left the company shortly after this conversation to find another position. The productivity of your department decreased over the course of the next year, you lost several other employees, and some major customers were openly questioning the sales team about whether it was safe to do business with your company.

You got this outcome by choosing statements that consistently failed to demonstrate a coaching mindset and good use of the coaching fundamentals. You chose statements that showed a lack of confidence in Anneta's judgment and ability make her own career decisions. Most of your statements focused on telling her what to do, rather than listening to her point of view. This outcome represents a missed opportunity for you and the company to engage, develop, and use Anneta's full potential.