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*From Second Banana
to
Leader of a Powerful Bunch*

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This case study involves the transition of a small, closely held two-person partnership into a family business and then back to a closely held entity. The company with which the author worked was in the business of industrial cleaning and disaster recovery. It employed approximately 50 individuals at the beginning of our work together, mostly semi-skilled workers and administrative personnel. The company was owned and operated by two partners, one of whom was my client. This article focuses mainly on several transition points in the company's growth as well how the organization effectively adapted to those transitions, through identifying and drawing more deeply on their own resources. These changes were almost entirely precipitated by one leader's development. The client's willingness to learn and be different facilitated a great change in company culture created an atmosphere, much more conducive to employee satisfaction and retention. The work took place over a two-year period, from 1999 into 2000.

At the time I began working with Paul P. he was a bright, articulate and extremely likable forty -two year old man married with two young daughters. He held a Masters degree in Industrial Psychology and had co-owned the business for about three years. A former client of mine had referred me to him because he was "wickedly stressed out." During our first meeting it became clear that he indeed felt a great deal of pressure. The business was viable, but floundering, and Paul admitted to feeling very "out of control."

As we began to contract for change, it seemed to me Paul's company had much working in its favor. He had a number of dedicated employees that had been with him since start up and they had a loyal client base. I first wanted to determine what success would look like for Paul but before we could even do that, I thought it important to assist him in focusing not only on his current circumstance, but also on what might lie ahead. It took some time, but as we talked Paul began to see that what he and his group had accomplished in three years was quite remarkable. As we explored some of the company's successes, Paul seemed to relax. We spoke at length about his employees, many of whom Paul was clearly quite proud. He knew a lot about them and seemed genuinely interested in their development and welfare.

In order to get a better sense of the goals that we would work towards, I asked Paul to describe what he would tell me if we were to speak a year from that point and his company had become enormously successful. Although he initially had some difficulty in creating the vision, he was able to articulate enough of the basic elements to allow me to assess what was important to him as well as how he viewed the business. From that point we were able to proceed toward some goals for the work. I generally ask clients to rate their level of commitment to change/improvement on a scale of 1 to 10. I find this exercise to be helpful if and when we encounter obstacles that the coachee is reluctant to overcome.

Paul reported that he was fully committed, a level of 10. I let him know that I was pleased to hear that, since it would place him totally at my mercy, which was a virtue I held in only meager amounts. We laughed and moved on to forging our agreement and setting some goals. I believe that there are generally three types of goals, the coachee's goals, my goals and goals that are reasonable to accomplish. Often there is great overlap in these three, sometimes very little. In this case, there was great overlap. These were the goals upon which we agreed:

- 1) Paul wanted to be less dependent on his partner for selling, specifically in bringing in new business.
- 2) He wanted to grow the business, particularly in the area of disaster recovery.
- 3) He wanted to offer more opportunity for staff development and growth within the organization.
- 4) He wanted to feel more “on top” of what was going on in his business and with his employees.
- 5) He wanted to solidify office operations, particularly in regard to collections efforts.
- 6) He wanted to cross-train employees and update his technology and his employees’ skills in working with technology.

In Partnership

The first thing I consider when working with any coachee is his strengths and his areas of competence. Thinking systemically requires that I also be aware of the context in which my client is operating and therefore the strengths and competence that may be available to him within his system. Although we identified a number of untapped resources and abilities within the organization, the discussion inevitably returned to the “problem of his partner.” Since we seemed to be blocked at every turn by Paul’s partner, it became increasingly obvious to me that progress would be slow if not impossible unless and until we addressed the power struggle between Paul and his partner (we will call him “Bob”).

As we delved more deeply into the dynamics within the company, a picture of a fairly entrenched power struggle began to emerge. Bob was a somewhat formidable and unapproachable character, at least in Paul’s view, and shared very little of Paul’s vision for the future of the company. In point of fact, he shared very little with Paul in most aspects of his thinking about the business. He and Paul disagreed in particular about the meaning of leadership. Paul saw leadership as a privilege, one that came with both responsibility and opportunity. Bob saw leadership more as an activity and he felt that the employees should be grateful to have their jobs. Paul was collaborative, even to a

fault, whereas Bob was bottom line driven, with much less interest in understanding the subtleties of getting the most from his employees.

Whenever I encounter this type of standoff, I am immediately suspicious that each of the individuals is getting some secondary pay-off from the deadlock. Even when it seems that the power differential is tipped much more in one direction than the other, it always takes two to maintain the static balance. I asked Paul what he would do if his partner no longer limited him. He indicated that he would undertake a number of initiatives designed to make the company more viable, addressing most of the goals mentioned above. I asked, “So the only thing stopping you is your partner?” “That’s right,” he said. I then asked him to consider my next question for a few moments before answering. He agreed. “So what do you get out of having a partner who keeps you from trying those things that you tell me you believe to be important?” He hesitated briefly and then answered, “I guess I can’t possibly fail.” “Is that actually true?” I asked. He replied. “No, because I feel like I’m failing now.”

One of the many differences in working with a small closely held business as opposed to a larger corporate environment is that there are often no “tiebreakers” such as a Chairman or a board of directors to weigh in when a power struggle exists. This struggle was not always overt so at times it seemed invisible to Bob since Paul had such anxiety about confronting him. It was unlikely that Paul and I would be able to move in the direction of any of his goals until the struggle was first made overt and secondly brought to some kind of resolution. Paul’s inability to confront Bob was just one example of ways in which his fears severely limited him. He was also extremely reluctant to make “cold sales calls.” Consequently, he worried that if he had it out with Bob and Bob were to leave, he (Paul) would not be capable of doing the selling.

There was also the matter of Paul feeling intimidated by Bob. He was not an easy man to challenge or confront. Paul and I spent some time together addressing both of these issues, which were separate but related. I sometimes find it helpful with clients when they are

stuck to ask them to step back from possible outcomes. I ask them to tell me what they might do if they weren't worried about how it might come out. Paul knew he had to have "the talk" and he did. The surprising outcome of this conversation was that Bob was willing to let Paul buy him out. Neither Paul nor I had the slightest idea that this would happen. There were also some forces at work in Bob's life that helped close the deal, but it is often these serendipitous events that seem to intervene when we take action. Clients commit to action. Paul and I kidded that he was now like a dog chasing a car. What would he do if he caught it? Paul had caught the car.

Bringing In His Wife

Since we had already spent some time evaluating and assessing his employees' strengths, we had a good place to start. I operate from the belief that organizations and teams of any size have far greater resources and capacities than they think they do. We sat down with Paul's top eight employees to determine how true my theory was in this case. We found that two of Paul's office staff loved the computer. Each of them was set up for training and was charged with the responsibility of identifying a software product that would meet the needs of the business in the areas to which they were assigned.

One staff member stepped up to spearhead a collections initiative, while another became quite proficient in the use of groupware. Simply by tapping existing resources within the company, Paul had made great progress in dealing with two of his most vexing issues within a relatively short span of time—both of which were mentioned at the outset of our work together. I would like to report that all this reorganization, training and resource development went forth without a hitch, but of course such was not the case. To paraphrase the great Winston Churchill, we were not at the beginning of the end but more at the end of the beginning.

Although Paul was happy and excited to be taking the reigns of the operation, he was also uncertain about how to create structure in the form of policies and procedures. Paul had a wife, however, who was relatively certain that she knew how. So, Paul's wife,

Mary, joined the team as office manager. What struck me almost immediately upon meeting Mary was how much her personality resembled Bob's. Whereas Paul was flexible and easy going with employees, Mary was much more rigid and unyielding. Paul tended to trust his workers. Mary tended to trust neither Paul nor his workers.

As is often the case when two such disparate personalities come together, a spirited game of "push me out on the pole" ensued. The tougher Mary became with employees the more accommodating Paul became. We were rapidly headed for Attila the Hun meets Marshmallow Man. To say that Mary had no allies would be unfair. She had one. It was Bill—a man so concerned with world dissipation that he could not possibly get enough of rules and regulations. Everyone else on the staff went to Paul for everything, because he never said no. Obviously Mary's entry into the system caused a fair amount of upheaval, including the loss of one key staff member who handled much of the accounting work. However, it did make Paul's areas for development at once unmistakable and undeniable. This seemed like an excellent time to explore with Paul his tendency to assign the "bad cop" role to someone else.

I believe that behavior is the most sincere form of communication. Those leaders who have a variety of behaviors from which to choose are, by definition, the superior communicators. Paul had essentially one way in which he approached others. He sought to please them. So he became extremely competent in this area. Unfortunately for Paul, this approach was seen by several of his employees as an invitation to take advantage of him and more than a few accepted his invitation. A couple of his employees began to steal from him and did shoddy work. They seemed to feel entitled to whatever they could get. These activities got Paul's attention. Although he went through a stage of being shocked that people he had treated so kindly could do him so wrong, he began to realize that people would treat him and the company in exactly the way he trained them to. We began spending a lot of time adding to his repertoire of behaviors. He began to have a grudging appreciation for some of what he saw in his

wife's approach. He realized as we continued to work together that if he were able to broaden his managerial skill set he would have much less of a need for a partner to play bad cop to his good cop.

At this juncture my role was similar to the "cut man" who works in the corner of a prizefighter during a bout. Being firm was a new and extremely uncomfortable behavior for Paul—a true learning experience. Each time he had fired or disciplined an employee I helped apply the styptic pencil and tape and sent him back in to start the next round. Paul did incredibly well. He showed great courage in taking on these new challenges. Watching Paul convinced me to an even greater extent that individuals as well as groups often operate on only a small percentage of their abilities. As a coach, it is amazingly gratifying to assist a client in the process of challenging their own personal assumptions and eliciting from them capacities that may have laid dormant for years. I think it's the province of any good coach to see abilities in our clients before they recognize them themselves.

Paul was going to need every bit of his newly found boundary-making ability to take on his final "opponent." There was still the matter of how to approach his wife. This one was for "all the marbles"—a true heavyweight 15 round championship bout. We knew we would have to "train" well for this confrontation. This type of situation, of course, is illustrative of one of the marked differences in dealing with a closely held/family business. When we are working with a familial dynamic, we are almost certainly encountering a level of emotional intensity that we are unlikely to see in any other setting. We are also punctuating two systems simultaneously, which is tricky business to say the least.

Paul and I spent a considerable amount of time discussing how he might best have a conversation with Mary. Paul understood that this interaction could have consequences that might reverberate through his life for years. I was hopeful that since Paul's repertoire of behaviors had been expanded to include having tough conversations with his staff, Mary might be more amenable to "softening up" a little. One of Paul's great

strengths was his skill of diplomacy. We agreed that he would need to employ that skill set in this situation. I told Paul that I suspected he knew what kind of approaches had worked with Mary in the past. We joked that "marriage is about learning to love the enemy." We agreed that we had to know them to love them. Paul recognized that any negative feedback he might deliver to Mary would almost assuredly lead to her becoming defensive.

He decided that he needed to frame the conversation in terms of his own personal responsibility and that's what he did. He told Mary that he had put her in an untenable position with the staff by tacitly requiring her to be the tough one. He added that he realized that he did the same thing at home with the kids and asked Mary for an opportunity to try to do better. Since Mary could not really disagree with any of this she became somewhat intrigued. Paul requested that Mary let him handle the disciplining of staff because he felt that it was time for him to step up to his responsibility. He further requested that if Mary picked up on something he had missed, she simply report it to him and he would address it immediately. Paul acknowledged that he had not been fair to Mary in a number of ways. Their marital agreement had always been that Mary would work in the home raising the kids and Paul would earn the income. Paul also acknowledged Mary's great contribution to his managerial turn around. She had been an integral part of Paul learning how to set firmer boundaries.

Going It Alone

Although I was not present for this conversation I have always pictured Mary as having one eyebrow arched almost to her hairline, in both surprise and suspicion. It takes time for others to truly recognize changes in our behavior. This statement seems to be all the more true when the observer is a family member. They tend to see us through the haze of who they think we are long after we have made change. In any case, this conversation had several salutary effects on the company and the marriage. The shift was gradual but over a period of about six months Paul was clearly in charge of his own operation. Once Mary saw that Paul would indeed do what he had promised she was able to back off and let

him. The employees reacted favorably to the change as well. They seemed much more at ease once they knew that they were answering to Paul.

Paul had found a balance. In developing his capacity to be assertive, Paul was encouraged to be more aggressive in his approach to sales. He identified an administrative staff member to make phone calls on his behalf and to set up qualified sales calls for him. This worked well for Paul. His sales increased steadily over time.

About six months after Paul and Mary had their conversation Mary decided that it was safe to leave and she did. She left the job, not the marriage. At that point Paul's transformation from "Marshmallow Man" to strong leader was very much in evidence. Paul has since then moved the operations to a new and larger location and currently employs over 100 workers. During our last conversation Paul reported that he still has many of the same issues with the business and the staff as he had when we worked together, but he said they just don't affect him the same way. Paul said, "Where I used to see big issues, I now see business decisions. That way of thinking has reduced my anxiety a great deal. I'm also more able to go home and leave the business at work. Not all the time but much better than ever before."

Concluding Comments

I chose this case to report because it was a great learning experience — not only for my client but for me as well. It is to this day one of those most satisfying engagements in which I've had the privilege to participate. Due to small size of the operation, interventions were often powerful and their outcome unambiguous. Larger systems do not often afford us opportunities to see how our work impacts the system quite so clearly. I also have become much more aware of how much time entrepreneurs spend in the "realm of the doing" and how little time they spend in the "realm of the thinking."

This case also confirmed my belief in the untapped potential contained in each of us and within the organizations in which we operate. It helped me to understand small business in a much more profound

way. The businesses owned and operated by most entrepreneurs truly are an extension of their personalities and their belief systems. Whatever they struggle with internally will almost certainly be observable in the way their company operates. In the corporate sector there are of course ways in which leadership applies their imprint on their employees. But that imprint is in no way as profound and obvious as it is in a small or family-owned business. Consequently, when a small system is punctuated at the level of leadership, the system can change quickly and dramatically before it re-equilibrates.

This realization has led me to approach my work differently in larger systems as well. Coaching in "a vacuum" is incredibly tough work. If the people around the individual I'm coaching are not part of the process they have a great deal of difficulty in recognizing growth. They sometimes believe that the client is only different for a few days after the coach leaves. This means to me that change is all about someone else. If we are to be effective in working within larger systems, then change can't be someone else's responsibility. It has to be a shared objective.

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