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Practicum: Patricia J. Moser

Issue: A friend had a work situation which had become untenable. Several issues culminated in her considering just walking in and resigning, or perhaps going on stress leave. Her stress level was at a point where she was crying when even speaking about the situation.

The issues with that she was dealing with were as follows:

- Excessive number of hours. Over the last couple of years she was given increasing responsibility, marketing, public relations, special events and corporate sponsorship. Originally her role encompassed just the latter two items. Regularly she was now putting in 80 hours a week.
- Even though she was putting in all these hours, her boss questioned her about what she was doing when she didn't come into the office and that as it is a small group (non-profit 7 employees) that she needed to be in the office and not work from home. My friend felt that she was being questioned by this request as to her work ethic.
- A few months ago, there was a policy change which changed the vacation allowance, from 4 weeks after 4 years, to 4 weeks after 5 years. My friend had just ticked over to 4 years and thus, by the new policy, she wasn't eligible for the additional week. She was the only one of the group affected by this alteration. She had not addressed this issue with her boss, but it was eating at her about being unfair.
- With all the excessive work hours, my friend's relationship with her fiancé was suffering as she didn't have much time to spend with him and moreover when she did, she was so stressed that a lot of their communication was about her job and not about their upcoming nuptials. She had also not attended some important family events because of work. Furthermore, she also needed more non-work time as she was studying for her certification exams in her field.
- No matter what she did, the "extra-mile" that she went, her boss never thanked her. Never said "good job", no appreciation at all. She felt under-valued.

I know her boss, and have worked with her. She is a workaholic, constantly running. I haven't seen her as authoritarian, nor as "unfeeling" but as I was the Chair of the organization, I know that different roles, different perspectives. However, it gave me a unique perspective in regards to being able to understand the approach which my friend should take in trying to approach the issues and her leader.

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Coaching Protocol

My friend had a 1:1 meeting coming up with her boss. I had several lengthy discussions with my friend in regards to what was important to her, and how to prioritize and categorize the issues. In our first talk, she was all over the place, with the message more or less being “I just want it to get better.” From there we developed the following approach to her meeting.

My friend kept on noting that “her boss did this” and “she needs to do this” and “why doesn’t she understand” etc. etc. I suggested to my friend that during her meeting she should consider the quote “If I say what I have in mind, will I improve on the silence?” I indicated that even though this was a difficult conversation that she was to have with her boss, she could still take the “higher ground” and be inspirational. She needn’t play the blame game – she needed to provide her boss with insight and information which she may not have. I said to her “your job is also to make your boss a better leader, and you can’t do that if you don’t create understanding, and a common meeting place, where both of your needs will be accommodated.”

The key things my friend indicated that she wanted to achieve in the discussion was:

- An appreciation of the effort that she is putting in and the amount of work this entails.
- Ability to work from home, without being made to feel like she is “slacking off”
- More balance. She needed to have time to a) study for her certification exam in August and b) to have more quality and quantity time with her fiancé and c) time to plan her November wedding

First, I asked my friend to create a document that would clearly outline all the work that she had been doing and all the hours that this required. Her boss is a CPA, so clear articulation of the situation was important. I asked her to go back about 6 months if she could and to put this information in a spreadsheet if possible for the meeting. I also asked for her to consider how many other things she was being pulled into that were clearly not part of her role, but just because she was “helping out,” and how many hours this was taking from her “real” job.

Secondarily, I asked her what from a time perspective she needed for studying for her exam, and with that not necessarily affecting the time she could spend with her fiancé. She said well I need more balance. I had her read the Sprit@Work card entitled “Integration” . We discussed this and she liked the concept of Integration not balance. We finally got to a point where she noted that it would be nice to have a set time where she could go home, study for a couple of hours and then have time for her fiancé in the evening. She also indicated that she couldn’t

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keep spending weekends catching up on things that she didn't have an opportunity to do during work hours.

Finally, she wanted to still be eligible for the 4 weeks of vacation, that she believed had been denied her by the policy change.

Planning for the Discussion

I asked my friend how she was going to broach the issues during the meeting with her boss. Her intention was to tell her how things aren't fair, and she is doing all this work and she's getting no help, she's overwhelmed and it doesn't seem like her boss knows or cares and moreover that she felt that her boss was questioning her work ethic with the comments about her working from home and that she was being punished with the change in policy.

She also wondered whether she shouldn't just go in and resign. I recommended that first she needed the courage to deal with the issues at hand, because otherwise she would never know if she could have influenced a different outcome. And just walking in and resigning could be a career limiting move – not looked highly upon by potential employers.

I suggested to my friend that if she communicated in the way noted above, she was in effect being combative – that this approach would result in defensive measures from her boss, because my friend would be accusatory and that inherently would require an equivalent response.

I indicated that it was much better to look at first “depositing in the bank of goodwill” before making any move to withdraw. Furthermore she was assuming that her boss knew about her extra work, her efforts, the competing time issues etc. What she needed was to approach this in an explanatory way, an inspirational, and authentic way, and always keep in mind “am I improving on the silence.”

So the approach we agreed upon and which was followed through on is as follows:

- She began the meeting with acknowledging that her boss probably had certain things that she wanted to discuss, but that my friend also had issues that she would like to discuss and hopefully get some resolution during this meeting.
- She began by acknowledging that the organization has really done well under the leadership of her boss, the significant growth of the membership and the increasing influence of the organization. My friend then went on to say that she really appreciated the confidence her boss had in her by giving her all the additional responsibilities and certainly she felt she was contributing, as well as learning a lot.
- My friend then said that there was another side to this additional responsibility, which was the significant number of hours that she had to put in to ensure that her work was up to

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standards. She then indicated to her boss that she would appreciate the opportunity to take her through some of what her work entails and so she had prepared a spreadsheet, which would provide some insight, and would it be OK if she walked her boss through this – which she did. She also noted that there were times when the “crunch” was on to get things done, which resulted in her working from home, to be able to finish things without interruption. She also then asked her boss whether she understood why sometimes it would be better for her to work from home.

- She also mentioned to her boss that she had gotten lots of accolades from others regarding the special events that she organized and managed and she was wondering if her boss also felt that these events were worthy of these accolades, or if there was something else she could be doing to improve the experience.
- She advised her boss about her exam for certification which was coming up and that she was getting a little concerned about her ability to find the time to study for it. Furthermore, she mentioned that with her upcoming nuptials, that the consistently 80 hour work week did not enable her to have proper balance. She asked her boss whether she(his boss) had any suggestions regarding how to assist her with ensuring that she passed her certification exam, and kept her fiancé!
- Finally, she mentioned about the vacation and she wondered if her boss had realized that this impacted my friend. She stated that she understood that her boss would perhaps want to change the policy for new hires and that it was a reasonable policy. But she stated that when she was hired, she had assumed that she would be getting the four weeks and whether this is something her boss would still consider (note that although we talked about the fact that it was not acceptable by employment standards to change the terms of the employment agreement part way through, I suggested that this again would set up a combative scenario, and would eliminate any goodwill she had built up by that point).

Result

I spoke to my friend shortly after the meeting, and it her relief and enhanced mood were palatable from the first words after I asked “So how did it go?” Her response was “Amazingly well.”

Firstly her boss indicated that she valued my friend and her contributions to the organization. She stated that she knew that she had asked my friend to do more, but hadn’t realized the amount of effort it was taking. She thanked her for enhancing her understanding by putting the spreadsheet together.

She noted that she had a better understanding of why, at times, my friend would work from home, but that this needed to be coordinated appropriately because, although sometimes it would be OK, at other times it would be difficult and so if my friend felt the need to do so, they should sit down and talk about it first.

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The boss also indicated that because she is a workaholic, sometimes she loses sight that others are not and also she didn't want others to fall into her life style. She noted that she appreciated the effort my friend was putting into ensuring that everything was successful and yes, the accolades were well deserved.

The boss certainly noted that she wanted to support my friend in being successful in her certification exam and that given all the extra time that she had already put in, that my friend should leave at 4 pm everyday so that she could go home and study. This actually surprised my friend, because it was much more than she had expected. But then again, she approached it by not making a demand, but asking her boss what she would suggest would work. Her boss also noted that hopefully this would give her enough time with her fiancé as well.

Finally regarding the vacation. Her boss asked my friend how long she had been concerned about this given that the policy rewrite had happened several months ago. My friend confessed that she was concerned right from the beginning when the rewrite occurred. The boss noted that firstly, she didn't realize that there was to be an impact to any existing staff member, but secondarily she wondered why my friend hadn't addressed this with her right then, as opposed to letting it fester. My friend indicated that she didn't feel comfortable raising it, to which her boss said that anytime something is important she should raise it and she can't just assume that she (the boss) knows how certain things may impact. My friend now has her 4 weeks vacation

The boss then indicated that they should revisit these things in about a month, to see how things are working out.

Conclusion

My friend has chosen that for now she will stay with the organization, but she knows that once everything else in her life settles that she will revisit her career options in a year's time.

I believe my friend realized that by being positive and having a courageous discussion, but one that was not inflammatory, which improved on the silence and ensured that she took the "higher ground" resulted in a better outcome than she could have imagined.

I advised her that she needed to help her boss be a better leader, and by following the approach that she used this time, that she had changed the relationship between her and her boss and that the authenticity would be a great foundation for future discussions.