

A CASE STUDY:

HOW DO WE MOVE FORWARD



ULTRA TEAM DEVELOPMENT

LEADERSHIP COACHING
BUSINESS CONSULTING

EDWYN KUMAR, MARCH 23 2021

THE CLIENT

- ▶ Julie and Benjamin, her new business partner, are consultants with a focus on starting and maintaining new retail service projects. Julie's focus is on business plans, forecasts, operations and financing. Benjamin, a product expert, is focused on the service, product planning and design themes.
- ▶ Julie had raised some issues with communication being a sticking point, especially in relation to directives on process when developing the business plans for their clients. While Julie wants to ensure that no details were left unchecked, Benjamin felt that some of the details were unnecessary and confused the proposals.
- ▶ Meetings would struggle moving forward from these points. Julie felt challenged by Benjamin, and likewise he felt unheard by Julie.

THE APPROACH

BEHAVIOURAL PERSONAL PROFILE ANALYSIS (PPA)

- ▶ Ultra Team Development performed a Behavioural Analysis (PPA) for both Julie and Benjamin to assist self awareness and communication styles with a desire to explore why the meeting barriers were taking place.
- ▶ They both completed a PPA with and subsequently had individual one hour debriefs with Edwyn.





- ▶ Julie is high Dominance and high Influence.
- ▶ She likes results, a direct path, and works well with people.
- ▶ While personable and people driven, Julie likes to get to the point.

JULIE'S DEBRIEF

- ▶ Coaching for Julie consisted of reinforcing her ease of getting along with people. This allows her to relax in meetings and personal engagements.
- ▶ Discussions and skills on active listening and engagement (both archetypical issues for high D and high I behavioural styles) was had, with a focus on Benjamin's needs in their meetings.



- ▶ Benjamin is high Influence and high Compliance
- ▶ He likes to tell stories and back them up with facts.
- ▶ While fact based, Benjamin feels the need to over explain his reasoning.

BENJAMIN'S DEBRIEF

- ▶ Coaching for Benjamin highlighted that both he and Julie were naturally people oriented. This allows them to see what they have in common, and work on the relationship; something they both value.
- ▶ Benjamin was advised that Julie trusted his perspectives and he didn't need to back up all of his opinions with data for her to get buy in.

REMOVAL OF FALSE THREAT

- ▶ Julie and Benjamin realized that neither was encroaching on the other person's authority or process.
- ▶ When Julie wanted to 'move on' in a meeting, it was because she had all the information required to make a decision. Benjamin's desire to continue to explain was not necessary for her.
- ▶ When Benjamin was explaining his perspective, Julie realized that it was important for him to talk through his process. It was as much for him as it was for her.

FINAL CONCLUSION

FOLLOW UPS & OUTCOMES

- ▶ The energy between Julie and Benjamin is positive and productive. With a greater understanding of each other's styles, needs and focus, they have a greater appreciation of each other's strengths and skills.
- ▶ Holding a team meeting between both Julie and Benjamin to further discuss best methods of communications, meeting agendas and greater transparency on each person's behavioural style.
- ▶ Their consulting firm has picked up three new retail clients and is in location planning for a new retail concept for the beginning of 2022.

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