



Case Study: From Control to Empowerment

Executive Summary

A Senior Portfolio Manager struggling with post-merger integration transitioned from a reactive, directive management style to a strategic leadership model. By shifting from "controlling output" to "building capability," the client doubled their strategic research time and fostered a self-determined team culture.

Client Profile

- Coachee: "Alex" (pseudonym), Senior Portfolio Manager.
 - The Goal: Integrate two diverse, post-merger teams into a cohesive unit while reducing Alex's operational "churn" to prioritise high-level strategic research.
-

The Challenge: The "Bottleneck" Leader

Following an acquisition, Alex defaulted to protective and reactive behaviours that hindered team growth:

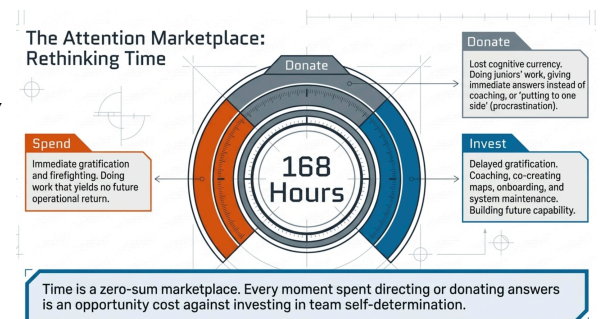
- **Reactive Management:** Overreacting to "performance theatre" and people-pleasing.
- **Directive Bottleneck:** A "command and control" approach that stifled initiative and forced all decisions through Alex, creating overwhelm and workflow friction. Three hidden beliefs were identified:
 - **The Injection Myth:** An unconscious belief that simply "telling" people what to do would result in immediate competence, leading to frustration when performance lagged.
 - **The Setup to Fail Syndrome:** Alex's intention was "servant leadership", but his behaviour was directive and instructional, signalling "I will tell you". In response, the team stopped taking initiative, creating a massive operational bottleneck.
 - **Attribution Syndrome:** Alex defaulted to blaming the team's "inherent lack of skill" for situational failures, failing to see how his own unintended micromanagement was the root cause.

- **Threat Perception:** An influx of new talent triggered defensive "inattentive blindness," obscuring the actual capabilities of the new team.

Coaching Strategy & Integrated Frameworks

The intervention utilised a multi-disciplinary toolkit to bridge the gap between intent and action:

- **Cognitive Regulation:** Used Haidt's Elephant & Rider to manage emotional impulses and Frankl's Logotherapy to choose constructive responses to stress.
- **Strength Calibration:** Applied VIA (Values in Action) to identify when strengths (like Honesty) were being overused as weaknesses (Brutal Honesty).
- **Structural Efficiency:** Implemented the 168-Hour Work Map to categorise time as *Spend*, *Invest*, *Donate*, or *Waste*, making the cost of micromanagement visible.



Targeted Behavioural Interventions

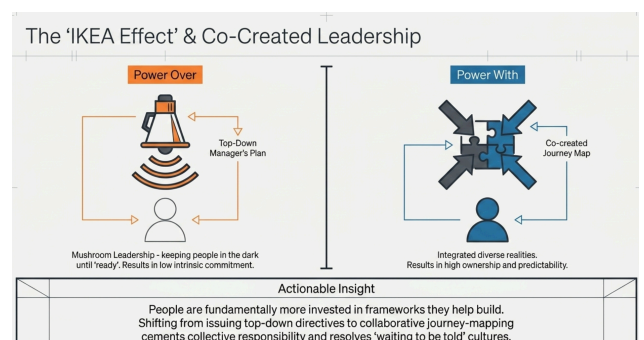
The coaching shifted from theory to practice through three core pillars:

1. Emotional Self-Regulation

- "STOP" Moments: Practicing a deliberate pause before responding to triggers, moving from a "reactive" to an "authentic" leadership stance.
- The "Shed and Shape" Routine: A daily boundary-setting ritual. Alex would "shed" tasks at EOD and "shape" priorities the following morning to prevent cognitive bleed into personal life.

2. Team Empowerment & Ownership

- **The "IKEA Effect" in Planning:** Transitioning from top-down directives to collaborative journey mapping. By "assembling" the strategy together, the team gained a sense of psychological ownership.



- **Output Regulation:** To balance a "Perfectionist" and a "Novelty-Seeker," Alex used the "One Idea, Calibrated Confidence" rule. This forced a focus on quality over quantity and created a "safe to fail" space for imperfect work.

3. Cognitive Processing

- **Ingest, Digest, Divest:** A post-meeting decompression rhythm used to filter "wisdom" from "waste," preventing information overload.

Results & ROI

- **Strategic Capacity:** Alex successfully **doubled** attention paid to strategic research time **from 20% to 40%**.
- **Cultural Shift:** The team transitioned from "waiting for orders" to a *self-organised, highly engaged unit*.
- **Personal Efficacy:** Alex reported a significant increase in internal calm, citing the ability to "stop and think" as a key driver for better investment decisions.

Lessons for Leadership

"From Judgmental to Curious:" The pivotal shift occurred when Alex replaced the "Attribution Syndrome" (blaming character) with an assumption of competence and exploration.

Coach's Reflection:

The most profound change came from a shift in language—moving from "*getting them to do*" to "*creating the space for them to be*." This case also highlighted the value of AI as a "thought partner," helping the client move into "Open Mode" thinking to solve complex interpersonal puzzles.
