



To Gain, You Must First Lose

WINNING YOUR LEADERSHIP JOURNEY, PART 1

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Published on LinkedIn: July 12, 2022

Meet Jonathan and Jayden, two archetypes of typical coaching clients. Both are high-performing leaders that have hit ceilings of their own creation:

Jonathan has the confidence of his firm and is on the fast track to senior leadership. His strengths include relating with people, systems thinking, and achieving results. However, recent feedback indicates that he is, in effect, "canceling himself out" by micro-managing his people, spreading himself too thinly, and bottlenecking workflow by having his eyes on every work product. He knows that senior leadership wants high-level strategic thinking from him, but he feels he doesn't have time to think. In coaching, he wants to work on his time management skills.*

Jayden has recently taken on the role of CEO. She has strengths in systems thinking and enjoys the challenge of leading an entire organization. However, she finds herself "in the weeds" of implementation far more often than she thinks she should be. She wants to spend more time doing "CEO level" work, but her calendar is fully booked with day-to-day operations, and her team relies heavily on her judgment and perspective. In coaching, she wants to work on prioritization.*

In Jonathan and Jayden's stories, you can see common leadership challenges and the typical response: to look outside themselves for the solution, i.e., fix their time management and prioritization. But what Jonathan and Jayden are actually struggling with is identity. When identity does not evolve with leadership responsibility, unconscious behaviors emerge that drastically decrease leadership effectiveness and, left unaddressed, eventually result in a host of leadership issues, including burnout, the belief that a leader has reached their potential, resignation – or termination.

A leader's journey involves four distinct levels of development. At pLink Leadership, we refer to this as **The Four Levels of the Leadership Journey**. Utilizing this conceptual framework allows us to illustrate to our coaching clients where they are on the journey and what's getting in their way. We also use this framework to scale our leadership development programs to match our participants' expected frame of reference.

The Four Levels of the Leadership Journey



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The levels are differentiated by title and scope of responsibility. More importantly and far less explicitly, each level relates to the leader's field of vision and how well they deal with complexity. While the core competencies of leadership are the same across the Journey, the way in which a leader exercises them should fundamentally change as they ascend the leadership ladder.

The developmental challenge is this: to become excellent at being the next-level leader, *you must let go of exactly what made you successful at the previous level before you are competent in the new level*. This is identity work.

What is identity?

Identity is our sense of self. It is shaped by experiences, relationships with others, values, and memories. It is our lens on the world and drives our internal narrative. Self-authorship is the internal capacity to examine and edit our beliefs, mindsets, and behaviors to adapt our identity to our environment. It is "inside-out" development and a critical differentiator between good and outstanding leadership.

In gaining and losing identity, we:

- Create our most potent memories over a lifetime.
- Experience a deep sense of grief – even if the new identity is one we want, we will long for what we'll no longer be.
- Feel a sense of being in limbo, which may be scary or uncomfortable in the early phases.

Simply put, we must examine and edit our beliefs and mindsets as our contexts change to successfully evolve and adapt.

Identity is so much a part of who we are that we fight to protect it and cling to it even when it is no longer accurate. But once we become aware of this mindset, we can intervene. One of my most successful clients, Leo, came into my practice as a burned-out CEO. Even though he had his dream position, it felt tenuous and unsatisfying. Over the course of coaching, Leo realized he was entering every interaction with a "chip on his shoulder" (his words) from being "the kid from the wrong side of the tracks." In an epiphany coaching moment, he realized that he could stop proving who he wasn't and settle into who he was. He shifted his entire frame of reference, his energy, and his intention. He leveled up.*

What does identity have to do with The Leadership Journey?

When a leader demonstrates excellence within one phase of The Leadership Journey, they are then promoted to the next phase. The explicit expectation is that they will successfully take on the new scope of responsibilities, and the implicit expectation is that their internal sense of self will evolve too. But without intentional intervention, this doesn't happen. Instead, the leader clings to an old identity and to the behaviors that made them successful in the previous role.

Jayden had reached her pinnacle goal of becoming a 400-level leader. However, she recognized through coaching – with The Leadership Journey – that she was unconsciously taking on the work of 200- and 300-level leadership (and in some cases 100-level) because she felt competent, confident, and comfortable in the details of implementation. Through coaching, Jayden learned to build a tolerance for the vulnerability of her new role and to delegate critical strategic initiatives to her team. As she shifted her focus from doing to developing, her team leveled up their leadership, and she could turn her attention and intention to 400-level leadership.

Jonathan was attempting to ascend the leadership ladder by holding onto doing all the work (100-level IC superstar) while also managing the work. His predicament was created by continually saying yes to work that felt easy and was intrinsically rewarding, which also let him avoid the vulnerability that comes with delegating work. Through coaching and examining The Four Levels of Leadership, Jonathan clarified how to evolve his identity to let go of the 100-level mindsets (e.g., "no one will do the work as good as I do") and level up to the 200-level mindsets (e.g., "I do my best work through others").

As you review The Four Levels of Leadership, I invite you to consider the following:

- Where are you in The Leadership Journey?
- How do the concepts presented here resonate with you?
- What becomes possible for you with this new awareness?

My intention is that my thinking and the stories of Leo, Jayden, and Jonathan provide insight and inspire you to level up your leadership mojo. Taking on the responsibility to evolve your identity consciously (with coaching or on your own) is an investment in self-development and a commitment to self-authorship that yields unending dividends of greater success and daily well-being. It's not self-help, and it's not therapy. It's creating your destiny.

To Gain, You Must First Lose

WINNING YOUR LEADERSHIP JOURNEY, PART 2

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Published on LinkedIn: August 11, 2022

To continuously become a better version of ourselves, we must evolve our consciousness. This mindset allows us to excel in our leadership, whether our focus is organization-wide or personal. The Four Levels of Leadership model illustrates the full continuum of the leadership journey. However, it is important to recognize that success is defined by excellence within your phase, not how far you go.

In Part 1 of "To Gain, You Must First Lose: Winning Your Leadership Journey," I talked about **The Four Levels of Leadership** and what it means to successfully navigate the leadership journey by letting go of one identity (often treasured) to grow into the next identity. In this article, I will explore the mindset and competencies of each level as well as what it means to embody the next-level mindset and competencies.

The Four Levels of the Leadership Journey



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Speed Tip: For efficiency, read the section that applies to you. When developing your people, read the section that applies to them to remind yourself of their challenges. (We forget along the way.)

100/200 Threshold

We all begin our careers as individual contributors. The expectations are that we are entering with baseline technical knowledge in our body of work and that we will accumulate additional subject-matter expertise over time. People who consistently demonstrate excellence in their body of work are often promoted to manager. As a new manager, the expectation is that you will manage the work of several people, consistently delivering on time and within budget, thereby freeing up your own manager to think and act at a higher conceptual level.

The Common Pinch Point at the 100/200 threshold: New managers will resist the vulnerability of delegating while simultaneously taking on more and more in an effort to demonstrate their potential to the organization. You know you are doing this if you are working all day – and then staying late into the evening to get “your” work done.



Growth Edge: Focus on learning how to swiftly and consistently delegate. This competency will serve you well throughout the rest of your Leadership Journey. Keep in mind that delegation is inherently vulnerable, so it will feel risky (and it is). You can mitigate this risk by thinking of delegating as an opportunity to apprentice someone versus giving something away. In the short run, it is easier, faster, and safer to do it yourself – but in the long run, this is a self-limiting strategy. Identify what you need to do and what can be delegated to others. Give clear instructions and even clearer end-state descriptions that include what and by when. Check-in along the way and make it safe for them to ask you for help. Give praise in public and critiques in private.

Scary Points: Trusting others to get the work done and letting go of the very things that made you a superstar.

Opportunity: Use the minutes and mindshare you free up to think about how to level up the performance of your team and how to streamline infrastructure and growth opportunities for your area of the business. This is 200-level thinking.

200/300 Threshold

As experienced managers and senior managers, we have demonstrated to the organization that we are reliable producers. Our reward? A title change and a greater scope of responsibility, of course! The expectation of a 200-level leader on their way to 300-level is subject-matter expertise in their area of the business as well as the ability to manage multiple strategic initiatives simultaneously (i.e., effectively manage competing priorities) and to accurately quantify tradeoffs to senior management to enable decision-making. Furthermore, leading at this level includes the development of a strong team and of the individual talent on it (to maintain a pipeline of talent and ensure succession) and continuous improvement in their area of the business (it's not enough to maintain status quo).

The Common Pinch Point at the 200/300 threshold: 300-level thinking requires a 30,000-foot perspective, yet the Manager/Senior Manager is stuck in the weeds. You know you are doing this if a common refrain is that you don't have "enough time to think" and if the feedback you are getting is that you need be more strategic and less operational.

Growth Edge: Focus on systems thinking. This means that you are thinking and making decisions from the point of view of the team that you are on, not the team that you lead. You are thinking organization-wide vs. your wedge of the business. You are observing the trends in the larger business environment and considering the implications to your organization (opportunities and threats). You are leading the day-to-day operations, doing your best work through other people, and elevating the organization by becoming skilled at anticipating future opportunities. You are able to make this visible to others with clear strategy and alignment up and across the business.

Scary Points: The 200/300 threshold confronts leaders with things they don't know how to do. But instead of acknowledging this and asking for help, they try harder at what they already know how to do. Imagine a vehicle stuck in the mud, madly spinning its wheels, burning fuel, and going nowhere.

Opportunity: Delegate like a boss, lift up and celebrate the successes of your direct reports (this is your success also), and develop a voracious appetite for learning and a willingness to learn in public. You don't get to play in the 300-level arena by playing it safe. Challenge yourself to build a tolerance for the discomfort of leadership – this is the vulnerability that comes along with managing the day-to-day operations while looking to the future and constantly feeling like you are not sure you know what you are doing.

300/400 Threshold

As experienced leaders with large remits, we have demonstrated the ability to manage complexity and consistently deliver quality results over time. This will earn us a position as a c-suite executive, either on a senior leadership team or at the head of an organization as the CEO or Executive Director. The expectation of the 400-level leader is to keep the organization continuously evolving and growing.

The Common Pinch Point: Up until this point in the Leadership Journey, the emphasis has been vertical, from individual leadership to team leadership to functional leadership. Senior 300 and 400-level leaders must demonstrate the ability to lead vertically and horizontally – i.e., collective leadership. At this stage of development in the discipline of leadership and human development, the concept of collective leadership is not widely understood. Most senior leadership teams operate as a collection of competing individual superstars versus one cohesive, in-sync team.

Growth Edge: A team cannot outperform the consciousness of its leader or, in this case, its senior leadership team. This means that you – and the leadership team – are what's in the way between what you have and what you want. What mindsets need to shift to free the organization to level up? Where are you contributing to exactly the results that you don't want?

Scary Points: It doesn't get easy, you don't get to feel like you've "arrived," and you will never make everyone happy. You will receive praise occasionally but feedback and criticism frequently. The stakes will be high – personally and professionally – because you will have more to lose. It will always be tempting to drop down into 200- and 300-level work because that is your area of proven excellence, and it is comfortable and familiar there.

Opportunity: Invest heavily in the development of your people, self-coach to remind yourself not to drop into 100/200/300 level work just because it affirms your value, and manage your energy and perspective (they are your most valuable leadership assets at this level and are easily corruptible). Hire a coach – or join a c-suite mastermind group – to keep your perspective fresh and agile and your energy positive and rich.

While the financial and social-capital benefits of leadership are real compensation, they often come at a very high cost to the individual leader who is white-knuckling their way through The Leadership Journey, hoping they are "doing it right," confused as to why they get stuck, and driving themselves to the point of burnout. What I know to be true is that the most common statement my senior leadership clients make is that developing other human beings is the most satisfying and fulfilling part of their work. This is as true for CEOs as it is for four-star generals. My intention is that "To Gain, You Must First Lose: Winning your Leadership Journey," Part 1 and Part 2 make the journey easier and reassure you that you've got this and you are not alone.