

## The Goldilocks Effect: Applying Ofman's Core Quadrant Model to ExPI Coaching

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When we provide ExPI feedback to leaders, we often find that they can get distressed about an even mildly low score in a few facets. We've seen leaders get quite upset because their lowest facet was, say, a 4.43/5.00.

To some degree, this is understandable. With names like Integrity, Practical Wisdom, and Inclusiveness, it makes sense that leaders would want to get the highest scores possible. One thing we find ourselves repeating in feedback sessions is that what we're striving for is not necessarily the highest possible scores across the board. While "too little" of the behaviors in a facet can be an issue, "too much" can be as well. What we want is a "just right" level of each facet.

Another issue is that adaptive change often feels threatening to leaders. If a leader has a towering strength in Restraint, for example, then encouraging that leader to be bolder about speaking up quickly and sharing provocative points of view may feel like an overwhelming goal. It may seem like we're asking the leader to undergo a personality transplant—or, at least, turn a worthy developmental goal from a challenging hill into Mount Everest.

You also may have seen an earlier ExPI Community of Practice [article about over-strengths](#). While this concept is useful, it doesn't quite do full justice to the complexity of the balancing act that leader's must pursue in search of this "just right" level of a facet. With this in mind, we recently thought of applying Daniel Ofman's Core Quadrant Theory (2004) to the ExPI model as a way of appreciating this challenge and helping to coach leaders through it.

### Ofman's Core Quadrant Theory

The premise of Ofman's theory revolves around four terms: core quality, pitfall, challenge, and allergy. Let's consider each in turn and then show it as a visual.

**Core quality:** A core quality is a recognized, foundational strength for a leader—something widely understood and appreciated as valuable.

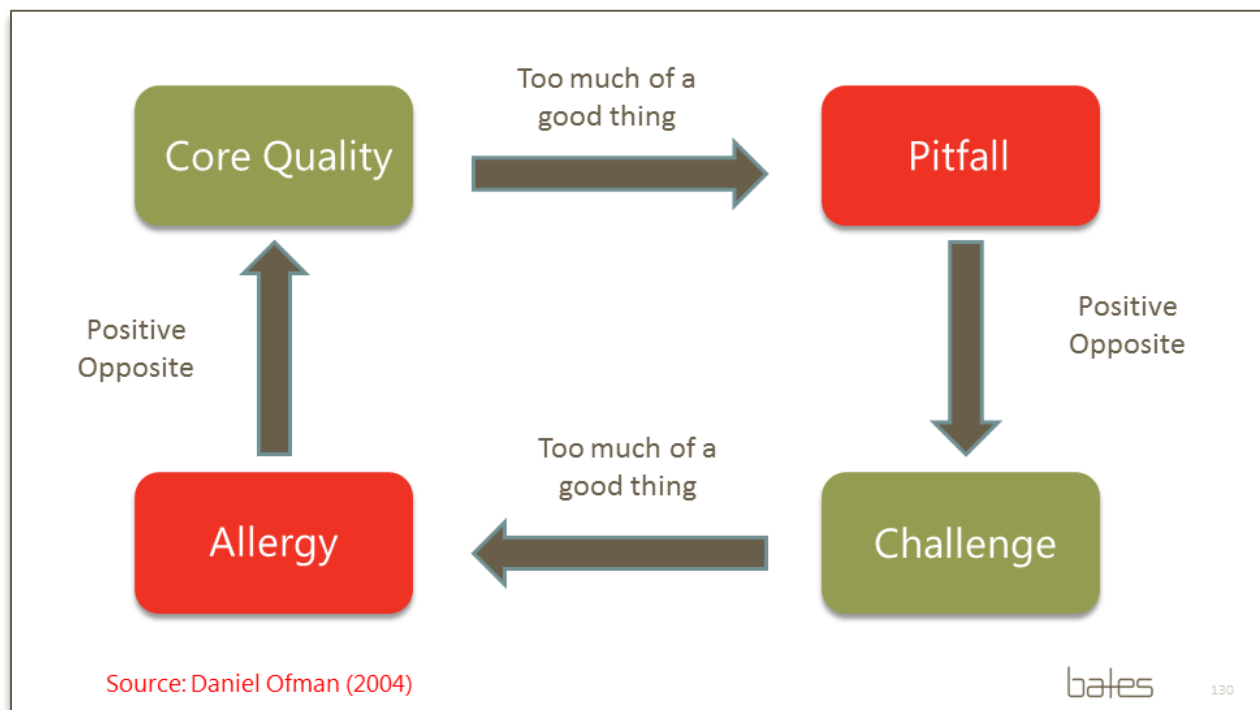


**Pitfall:** No matter what the core quality may be, it's always possible to have too much of a good thing. The pitfall is what we see if that core quality is overused and comes across as an over-strength.

**Challenge:** If we build awareness about the pitfall—whether it's a real or potential pitfall—then we also gain insight into the leader's developmental challenge: an adaptive behavior that would be worthwhile for the leader to display in order to avoid succumbing to the pitfall.

**Allergy:** However, efforts to tackle that developmental challenge can run into an obstacle in the form of what Ofman calls an "allergy." Basically, the leader may feel an aversion to a new behavior if it feels too much the opposite of the core quality. For example, if we encourage a leader to share provocative insights to boost Practical Wisdom, the leader's allergy might be his aversion to coming across as a cocky "know it all." This perception may be distorted—what the leader perceives to be "cockiness" may be viewed by others as nicely assertive and insightful. Still, if the behavior *feels* like it goes too much against the grain, the leader becomes "allergic" to it.

Let's take a look at the model. Start at the core quality below and read clockwise:



## Applying Core Quadrant Theory to the Bates Executive Presence Model

Now let's consider how we can apply to the Core Quadrant Theory to the Bates Model, using one facet from each dimension as an example:

EP Facet/ Core Quality	Pitfall	Challenge	Allergy
<b>Authenticity</b>	No room for others to offer input	Offer more opportunities for others to share views	People who don't reveal who they are and where they stand
<b>Confidence</b>	Too biased toward speed, action, quick results	Hit the pause button when more dialogue will create buy-in	Analysis paralysis without speedy results
<b>Intentionality</b>	Endless back and forth on tactical matters slows progress and pulls energy away from bigger-picture issues	Create meeting protocols that limit debate and promote moving forward with decisions	Decisions get made faster but at the expense of people having a voice

We see this cycle play out frequently in the form of "all or nothing" thinking from leaders receiving ExPI feedback. Let's consider Confidence from the table above. If a leader gets high ratings in Confidence on the ExPI, we may ask her to describe how she connects with this facet during her feedback call. She might say something like this: "I have always prided myself on having a get-it-done mentality. One thing I can't stand is meetings with people who are more interested in process than results. In those situations, I'm really going to push people to move forward rather than debating things but never *doing* anything about them."

This core quality has likely served this leader well for years. Often we find that leaders get promoted because they have earned a reputation as make-it-happen people rather than bystanders. However, when leaders rise in the ranks, the pitfall of this quality may become more apparent. That "need for speed" may leave others feeling like they didn't have an opportunity to ask questions, share concerns, or offer input. If the issue is important enough, this behavior will hurt the leader in areas such as Resonance, Inclusiveness, and Restraint.



As a result, we might set out a developmental challenge for this leader: Let's see if we can coach her to develop strategies to "hit the pause button" long enough to check in with others before we push forward to a decision or next step. That could remedy the pitfall.

However, hitting the pause button may feel like an allergy to the leader. Given how much the leader prides herself on decisiveness and action, what most would see as a "slow down to speed up approach" could be distorted in her perception. It may feel too much like that "analysis paralysis" that we know has triggered her in others. The last thing she wants is to be associated with people like *that*! It's certainly a balancing act.

We've seen this cycle play out repeatedly with leaders. One leader who attended the Bates Executive Presence Mastery Program worked diligently to improve how others perceived his Restraint. Previously hotheaded, he became so calm and careful that others eventually approached him and asked what was going on: While they appreciated that he didn't get overly emotional, they now missed his fiery side, as that passion was key to his strengths in Authenticity and Vision! Now he felt like he had become his allergy—the leader who is rather flat and uninspiring.

In the follow-up coaching call, Scott talked to this leader about this Goldilocks Effect and encouraged him to reframe how he thought about his core qualities of Authenticity and Vision. Scott suggested that he become more deliberate about his use of emotion and passion—tapping into those core strengths when he needed to rally people around a future goal, for example, but being careful about emotion when others' behaviors triggered him to become angry.

### Case Study: Applying Core Quadrant Theory to the Bates Executive Presence Model

Recently Halvor coached John, a Danish executive in a multinational pharma company. Halvor found that the Core Quadrant Theory was a useful way to help John appreciate a core quality while also mitigating the downside of that quality.

#### Core Quality

As revealed through his ExPI feedback, one of John's core qualities was the facet of **Humility**. John came across as: modest, grounded, and aware of own strengths and weaknesses. He did not need to be perceived as the smartest person in the room but would rather ask for others'



opinions... and he really listened carefully to their advice. This was a quality people around him appreciated, as they truly felt heard and taken seriously.

### **Pitfall**

However, a deeper dive into the ExPI report also indicated that this core quality was associated with a pitfall. He had low ratings in the Confidence facet, particularly on the items related to decisiveness and taking action without delay. His open-ended comments also included various gems that shed more light on the pitfall: Some saw him as a laissez-faire leader—people often were unsure where he stood. And his manager saw him as moving too slowly due to being overly concerned about getting everyone's input before making decisions.

### **Challenge**

A theme during Halvor's coaching sessions with John therefore became how John could adjust his behavior to meet the developmental challenge of coming across as more confident without letting go of his core quality of Humility. In other words, this meant finding a way to reach that "just right" balance between the core quality (humility) and the challenge (confidence). If he could do that, others might describe him as "modestly confident" or "confidently modest" – a combined quality John really admired in other executives who made their opinions known in a respectful yet firm manner.

Halvor asked John to explore what this balance might look like behaviorally. Together they came up with some developmental next steps:

- Going on a 30-day "listening tour" to solicit others' opinions about a new initiative... while also promising he would ultimately make the decision and share his rationale.
- Scheduling time on his calendar to prepare his own insights on topics prior to meetings rather than taking his usual "wait and see" approach.
- Creating meeting agendas that allowed time for healthy debate but also scheduled a slot for John to share his thoughts and emotions regarding the topic.

### **Allergy**

As much as John admired the "confidently modest" approach in theory, his allergic reaction was triggered when people on his team became too confident during those "healthy debates." He strongly disliked people who thought they had all of the answers or took credit for results they should not take credit for. So when being confronted with this behavior, John reacted by overusing his own core quality of Humility. Thus he fell back into his pitfall—becoming too soft-



spoken and withholding his own thoughts as he brooded about others vying to be the smartest person in the room.

The “allergy” John felt towards overconfident or self-promoting behavior forced him back into his own pitfall, which made him vulnerable and ineffective. Part of the coaching task was therefore getting John to become more aware of how others’ behaviors were triggering him and leading to a counterproductive response. Halvor encouraged him to have a less fixed or judgmental view of others he perceived as arrogant, and together he and John worked on strategies to help confront these “smartest people in the room” in a modestly confident way as rather than going silent, brooding, and falling back into being more invisible.

While John’s development is still a work in progress as of this writing, he is now experimenting with various modestly confident approaches of dealing with arrogant outbursts from others:

- Inviting quieter members of the team to weigh in.
- Encouraging and rewarding others who share credit for their successes and who acknowledge their vulnerabilities
- Holding one-on-one meetings with the “smartest people in the room” to ask them questions about the impact of their behavior

## Final Thoughts

The ExPI feedback process is designed to help leaders understand and leverage their strengths while also appreciating how these strengths can be overdone and potentially explain why other facets have emerged as development themes. Adding this layer of Core Quadrant theory can help you and the leaders you coach see the connections—and, sometimes, tensions—between core qualities, pitfalls, development challenges, and allergies.

Does a very high score in a given facet indicate an over-strength or guarantee a pitfall? No. If a leader has a high score in Confidence, for example, we might suspect an over-strength—but if we see their scores in Restraint or Resonance are high, we might say that they have *complementary* strengths, not over-strengths. Likewise, if Vision and Humility are both high, we might have a leader who can passionately talk about the future while being open to others’ ideas—a powerful complement.

But when core qualities lead to pitfalls or over-strengths, it’s important to remember that leadership development often requires a series of adjustments and counter-adjustments by both





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coach and leader. As the ancient proverb goes, "The pendulum must swing both ways before coming to rest in the middle." Experimenting with new behaviors will feel risky to the leaders that you coach. Applying Ofman's theory can reassure leaders that these swings are normal and ultimately represent progress. Just like Goldilocks, the leader may have to try something "too much" or "too little" before landing on "just right."

