

GROWING TOGETHER

When Success Demands You Become Someone New

“What brought me here wasn’t going to take us there. I needed to evolve from project management to executive leadership, but everything I was certain about was actually limiting what was possible.”

— M.J., President, Boutique Wealth Management Firm



THE CHALLENGE



Our firm had been successful for over 20 years, but we found ourselves facing unprecedented growth. New products, new team members, new technologies, even launching a nonprofit venture helping kids in Brazil. It was exciting but overwhelming.

I had just been promoted to President, and my colleague M.S. became VP for Team Development. We’d both been excellent project managers, but leading through this kind of expansion—that was completely different territory.

The pattern that wasn’t working:

- Applying project management approaches to executive leadership challenges
- Trying to wrangle complex organizational transformation like a detailed project plan
- Operating as hyper-responsible solo performers rather than a leadership team

My detailed planning and process control had worked perfectly for managing projects, but I was hitting walls trying to direct such big changes. The certainty that had made me successful was becoming my biggest limitation.

M.S. was at loose ends too. “When we started, I was struggling to find my voice and often felt lost in our fast-paced environment,” she reflects. She needed to grow into her new role but wasn’t confident initiating projects or sharing ideas in leadership discussions.

Our owner, TK, could see what was happening. He’d facilitated leadership training himself before, but he realized we needed something different. The whole team needed to understand how to work together as we grew, and he needed an outside perspective so he could participate fully.



THE WORK WITH CHRIS

Chris started with our ten team leads: an 18-month development program using Unique Abilities curriculum, highly customized for our situation. He facilitated Gallup StrengthsFinder and Kolbe-A assessments, giving us a shared language for how we each contributed. TK was relieved to be a participant instead of the facilitator.

But the real breakthrough came when we took ownership of our own development. After a break, Chris provided individual coaching for M.S. and me, plus sessions for us to work together. This continued for nine months, with quarterly check-ins including TK to align vision and execution.

What surprised me: I had to confront that my perfectionism about how things should work was actually my heaviest anchor. It was like trying to run 2025 apps on a 2010 operating system. Chris didn't fix this for me; he created space for me to see it myself and make my own upgrades.

M.S. and I also had to learn how to push back with TK and have difficult strategic conversations. This wasn't comfortable at first, but it became essential for real partnership. In her individual sessions with Chris and together with me, she practiced for real-life situations and that built her self-confidence.

The work was revealing for all of us. We had to admit that our individual contributor mindsets were limiting what we could accomplish as a leadership team.





THE TRANSFORMATION



The shift wasn't just individual—it was how we worked together as leaders committed to serving our clients, our team, and each other. I had to learn to think like an owner instead of just a really good project manager. That meant embracing uncertainty, making decisions with incomplete information, and trusting my team to figure things out.

What we actually changed:

- I stopped trying to plan complex organizational change like a project with predetermined steps
- I learned to lead from possibility rather than control, asking “Who do we need to become to handle this complexity?”
- M.S. stepped into her leadership presence in ways that surprised all of us

M.S. found her leadership voice through her own hard work. “I can now initiate projects independently, speak my thoughts and ideas confidently, and collaborate effectively with our leadership team,” she says. “This growth feels solid. It’s now the foundation upon which I’m building stronger relationships with colleagues.”

For TK, watching this unfold validated his investment in our development. “I saw the team developing real empathy for each other and deep listening skills,” he reflects. “More importantly, I watched them become leaders who can handle volatile conditions with lots of unknowns while staying true to serving leadership principles.”

As a leadership team, we developed something we’d never had before: the ability to think strategically together, make decisions quickly, and execute with alignment. We became a leadership system that could process complexity in service of our clients and community.

The fundamental reframe: Instead of asking “How do we manage this growth?” we started asking “Who do we need to become and what does the organization need to position the growing staff in alignment with our mission and values?”





THE RESULTS



We successfully navigated that initial growth spurt through our own commitment to leading ourselves well. New processes were launched, teams grew, technology integration went smoothly, and the nonprofit is thriving. But the real test came after that.

Since then, we've taken on even bigger challenges:

- Bought another practice, doubling our size
- Launched two new service lines
- Managed complex acquisitions and integration
- Successfully navigated major service provider transitions

The leadership foundation we built during that development period is what's allowing us to handle this level of complexity.

The transformation we created:

- We now have a leadership team that can execute complex vision while staying true to our values to serve all our stakeholders, from clients to kids, with heart and skill.
- Team members at all levels are more engaged and empowered
- We're growing sustainably while maintaining our culture

Now I feel confident navigating our growth path with tools for sustained success. M.S. adds: "I'm optimistic and energized tackling challenges and adapting to constant change. The work we did to recognize our individual strengths and how they complement each other changed everything."





The most surprising discovery: The expansion, the acquisition, the new service lines needed us to become leaders who could think like owners, work together effectively, and evolve with the business while serving what matters most.

If you're a leader or leadership team facing similar growth challenges, the question isn't whether you can manage the complexity. It's whether you're willing to let go of what made you successful to become who your organization needs you to be.

Three development paths that worked for us:

- Full team development (18 months) gave our whole team a shared language and understanding of how to leverage each other's strengths
- Individual coaching allowed M.S. and me to do our own inner work and develop our leadership presence
- Executive team coaching with quarterly owner sessions helped us develop our leadership partnership and maintain strategic alignment



As TK puts it: “Leaders don’t fail for lack of talent and heart, and it wasn’t a technical expertise problem. We hit walls when our current ways of seeing the world can’t process the complexity we’re facing. We had to upgrade our capacities to be uncomfortable and still adapt, and Chris was the ideal partner for that transformation. But we did the work.”

The question for you: What patterns might you be missing that are obvious to others? What would upgrading your leadership operating system make possible for your organization and the people you serve? ”



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