

GROWING TOGETHER

When Success Demands You Become Someone New

“We’d been successful for twenty years. Then growth exposed what we couldn’t see: we were running 2025 demands on a 2010 operating system. The business didn’t need better project managers. It needed us to become different leaders.”

-M.J., President | M.S., VP for Team Development | T.K., Owner Boutique Wealth Management Firm



THE COLLISION

Our firm had thrived for two decades. Then came unprecedented growth: new products, new team members, new technologies, a nonprofit venture in Brazil. Exciting. Overwhelming.

M.J. had just been promoted to President. M.S. became VP for Team Development. Both had been excellent project managers. But leading through expansion? That was different territory.

M.J.: My detailed planning and process control had worked perfectly for managing projects. But I was hitting walls trying to direct this kind of change. The certainty that made me successful was becoming my biggest limitation.

M.S.: I was struggling to find my voice. I felt lost in our fast-paced environment—not confident initiating projects or sharing ideas in leadership discussions.

T.K. (Owner): I’d facilitated leadership training myself before. But I realized I needed to be a participant, not the facilitator. And we all needed an outside perspective to see what we couldn’t see ourselves.

The pattern wasn’t working: applying project management approaches to executive leadership. Trying to wrangle organizational transformation like a detailed project plan. Operating as hyper-responsible solo performers rather than a leadership team.





THE WORK



We started with our ten team leads in an 18-month development program using assessments that gave us shared language for how we each contributed. T.K. was relieved to participate instead of lead.

But the real breakthrough came when M.J. and M.S. took ownership of their own development: individual coaching, sessions working together, quarterly check-ins with T.K. to align vision and execution.

M.J.: I had to confront that my perfectionism about how things should work was actually my heaviest anchor. I also had to learn to push back with T.K.—to have difficult strategic conversations. That wasn't comfortable. But it became essential for real partnership.

M.S.: I practiced for real-life situations. Speaking up. Challenging ideas. The discomfort was the point. Each conversation built on the last until the confidence felt solid—not performed.

T.K.: I watched them develop real empathy for each other and deep listening skills. But more importantly, I watched them become leaders who could handle volatile conditions with lots of unknowns.

We had to admit that our individual contributor mindsets were limiting what we could accomplish together.





THE SHIFT



The transformation wasn't just individual—it was how we worked together.

M.J.: I had to learn to think like an owner instead of a really good project manager. That meant embracing uncertainty, making decisions with incomplete information, and trusting my team to figure things out. I stopped trying to plan complex change with predetermined steps. I started leading from possibility rather than control.

M.S.: I can now initiate projects independently, speak my thoughts confidently, and collaborate effectively with our leadership team. This growth feels solid. It's the foundation I'm building everything else on.

The fundamental reframing: Instead of asking “How do we manage this growth?”, we started asking “Who do we need to become?”

As a leadership team, we developed something we'd never had: the ability to think strategically together, make decisions quickly, and execute with alignment. We became a system that could process complexity.



THE PROOF



We navigated that initial growth spurt. New processes launched, teams grew, technology integration went smoothly, the nonprofit is thriving. But the real test came after.

Since then, we've bought another practice—doubling our size. Launched two new service lines. Managed complex acquisitions and integration. Successfully navigated major back-end systems transitions.

The leadership foundation we built is what's allowing us to handle this level of complexity now.

M.S.: 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.

M.J.: Now I feel confident navigating our growth path with tools for sustained success.



T.K.: Leaders don't fail for lack of talent and heart. We hit walls when our current ways of seeing can't process the complexity we're facing. We had to upgrade our capacity to be uncomfortable and still adapt. But we did the work.

If you're a leadership team facing growth that's outpacing your current operating system—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.



lead yourself well ... serve your great purpose

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