

Tool: Shadowing

Overview

Shadowing describes the practice of accompanying/observing someone for a defined period of time during their work and learning from this observation.

Application

Shadowing can be applied at any phase of the U-process. It allows you to:

- observe and learn from an experienced practitioner/leader.
- step into someone else's daily work experience.
- connect to someone who is facing similar challenges.
- observe and absorb practical and intuitive knowledge from a colleague, customer, or other interesting person, and by doing so gain a new perspective on your own work.
- develop real-time insights into the practices of an experienced leader.
- access someone's daily routine without their being "on stage."
- identify barriers and opportunities that need to be addressed.
- form new ideas for your own leadership practices.
- improve clarity about your own leadership challenge.

Principles

- **Embrace a beginner's mind:** Shadowing works best when participants select a person they don't know and a business area that is unfamiliar or "at the other end of the corporate universe." Shadowing is not an interview or a visit with an old buddy. It does not follow a structured program.
- **Suspend your voice of judgment (VOJ)** in order to see the situation with fresh eyes. Observe. Observe. Observe. Try to look at the situation from the perspective of a video camera, or a first day at work, or a researcher.
- **Access your ignorance:** As the day unfolds, pay attention to and trust the questions and observations that occur to you; record questions and important observations in your notebook.
- **Be empathic.** Try to observe from the other person's perspective. Try to understand their task and appreciate their approach and way of handling things.

Resources

- Scharmer, Otto. 2007. *Theory U*, Second Edition, Chapter 21. Oakland, CA: Berrett-Koehler.

Process

Setup

- **People:** Identify a possible shadowee.
- **Place:** The shadowee's location.
- **Time:** Allow a minimum of half a day and up to a full workday for the Shadowing .
- **Materials:** Use a journal to take notes during and after the process.

Steps

Step 1: Definition

Define the objective of the process and identify an appropriate person to shadow. Criteria are: relevance for your current challenge or opportunity, and for your desire to learn more about their work.

Step 2: Logistics

- Make an appointment with the shadowee.
- Let the person you have arranged to shadow know that you are interested in observing their daily practice and routines and that there is no need for any special programming or treatment.
- There is no need for the shadowee to set aside extra time for you except at the end of the day for the closing/debriefing interview (30 minutes–1 hour). This could also be done over lunch or dinner.
- Let the shadowee know what you are especially interested in learning about. The shadowee can then select the best day for your Shadowing experience.
- Confidentiality: clarify that anything you observe or hear will be kept confidential.

Step 3: Preparation

On the morning of the Shadowing day, prepare by taking 10–20 minutes before the exercise to:

- focus on the purpose of the Shadowing: What do you want to learn? What assumptions and mental models might you need to let go of?
- imagine the best possible outcome of the day for you and for your shadowee.
- connect to the future that you want to create, and think about how your Shadowing might be a small first step in that direction.

Step 4: Shadowing

Once you are with your shadowee:

- create transparency and trust about the purpose and the process of the Shadowing exercise.
- remind the shadowee that whatever you learn is confidential.
- listen with your mind and heart wide open, take notes, and follow the principles.

Step 4: Debriefing Interview

At the end of the day or over lunch, conduct a brief interview with the person you shadowed. Raise any questions that observations throughout the day sparked in your mind. Here are a some to consider:

1. What journey brought you to your current position?
2. What good and bad examples of leadership have you experienced?
3. What key challenges are you currently dealing with?
4. What is your work? What in your organization would be missing without you? What value do you add?
5. When you started in this position, what did you have to let go of (unlearn), and what new competencies did you have to develop?
6. What barriers exist in the current system that prevent your team/organization from realizing its potential more fully?
7. What personal practices do you use to tap into your best potential?
8. After all interviews have been completed, review the interview data and summarize the results.

Step 5: Personal Debriefing

Crystallize your observations and insights right away by recording them in your journal. Don't make phone calls or have conversations between your Shadowing experience and recording your thoughts and impressions. Use a structured debriefing process as suggested below, if possible.

1. What are my 2–3 key observations from today?
2. What are their implications for my own work?
3. What were 2–3 important leadership challenges my shadowee was facing?
4. What key interventions had the shadowee made in the past?
5. Reflect on any interventions that failed.
6. Were there any moments during the Shadowing day that I felt uncomfortable? Why?
7. Were there moments when I felt inspired? Why?
8. What other things did I notice about myself?
9. Other observations or key takeaways?

Step 6: Thank You

Close the feedback loop by sending a thank-you note.