

# Using Critical Incidents to Build Leadership Competence

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Leaders are tasked with solving problems that often represent persistent and unyielding challenges. An event is a critical incident when you as a leader attempt to address a challenge and things did not turn out as planned. Analyzing these moments can yield significant insights and learning about you personally, about how you understand or carry out your role and/or about how the system (the visible and invisible rules, relationships and dynamics of an organization) influences your leadership choices and opportunities.

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The primary goal of critical incident analysis is not to problem-solve. Rather, it is to more deeply understand what happened and explore multiple ideas about why it happened the way it did. Critical incident analysis helps leaders see things in a new way and try something new.

## Critical Incident Analysis: A three-step process

This learning from a critical incident is uncovered when you as a leader take these three steps to better understand what “did not go well”:

- 1. Describe** the facts of the incident: what was intended and what actually happened.
- 2. Diagnose** what led to the incident: what are multiple hypotheses about “why” it did not turn out well.
- 3. Decide** what to do: what are new insights and possible next steps to trying something new.

## Getting Started

Think of an incident where things did not go well for you in your leadership role and where the issue or challenge is still present for you. Use an incident that is current and where – even now, with the benefit of hindsight – you’re not exactly sure what you could have done to contribute to a better outcome. Jot some notes to yourself about who was involved, what was at issue, what you intended and what happened. The incident should be one in which you had a conversation with the other person or people and where you will be talking or working with them again in the future.



## Step One: Describe What Happened

During this initial step, the person with the critical incident describes what happened to their colleagues. The description includes what they did, what they hoped would happen and what did happen. Address the question in your description:

- What are the facts of what happened?
  - Example Fact: “My colleague and I disagreed and then the colleague talked to my boss.”
    - Tip: Focus on fact, not interpretation. An example of an interpretation is “my colleague undermined me.”

After the initial description of the critical incident the leader's colleagues ask fact-based clarifying questions. These questions illuminate what happened and create a deeper understanding of power dynamics, formal and informal roles, intentions of others, etc.

### Step Two: Diagnose – Generating Multiple Hypotheses



During this step, colleagues unpack the critical incident and then offer more than one hypothesis as to what is really going on. In sharing hypotheses, the colleagues refrain from problem solving. The leader listens with an open mind to gain new insights.

The following are areas to explore in generating hypotheses<sup>1</sup>:

- Person-Role-System Analysis to illuminate the leader's contribution to the incident
- Presence of adaptive and technical challenges and issues of loss
- Influence of race, class and culture
- Factors of trust, power, authority, accountability and competing interests
- Competing interests

### Step Three: Deciding – Next Steps Based On New Insights

The leader with the critical incident reflects on the hypotheses and shares their insights. Based on these new insights about the critical incident and new insights about self and others, the leader decides what he or she will do differently going forward and what steps she or he will take to address the situation in new way.



### Trying It Yourself

Journal:

1. *What is a situation that you are facing where you don't know how to move forward... a situation you have attempted to address with no or limited success? Include:*
  - *What was at issue?*
  - *Who was involved?*
  - *What happened?*
  - *What did you intend?*
  - *What was your contribution to the incident?*
2. *Who will you invite to be your colleague analyzing your critical incident? Include:*
  - *How would you describe their role in the 3-step process?*
  - *How will you share the critical incident analysis approach with him or her?*

For more information visit <http://rblconsortium.com> and <http://www.rbl-apps.com>

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<sup>1</sup> *These tools and frames as well as others can be found on RBLApps.com*