A BEYOND THE PATTERN EXECUTIVE AND ORGANIZATIONAL DEVELOPMENT RESOURCE

Where Is Your Organization Getting Stuck

A Practical Companion Guide for Recurring Organizational Challenges

The visible problem is a useful starting point. This guide helps leaders examine what is recurring, what already works, and which organizational conditions may need attention before choosing a response.

Understanding before assumptions

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PURPOSE AND USE

How to use this guide

Recurring organizational concerns often appear as isolated incidents, employee problems, communication failures, or resistance to change. A single event may require immediate attention, but a lasting response usually begins by examining the conditions surrounding it.

Use this guide individually or with a leadership team. Record specific examples, compare what happens across situations, identify exceptions, and choose one practical next step. The goal is not to diagnose the organization from a worksheet. The goal is to improve the quality of the questions that guide the next decision.

A four part process

01 Observe Describe what is happening without assigning motives or blame.

02 Gather Collect recent examples, relevant evidence, and the perspectives of people closest to the work.

03 Compare Notice what repeats, what changes, and when the concern does not occur.

04 Choose Select one response that fits the context, available authority, and desired result.

Before you begin

- Use specific, recent examples rather than general impressions.
- Distinguish an observed fact from an interpretation or assumption.
- Protect confidential, personal, legal, and sensitive employee information.
- Invite the people affected by the work to contribute appropriate context.
- Treat strengths and exceptions as evidence, not distractions from the problem.

Scope note: This resource supports organizational reflection and development. It is not a legal review, financial audit, clinical assessment, employee investigation, or substitute for licensed professional services. It does not guarantee a particular organizational outcome.

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PATTERN SNAPSHOT

Describe what keeps recurring

Begin with the concern as it appears in everyday work. Avoid starting with the person, department, or explanation you believe is responsible.

What is happening that should be different

Where and when does it occur most often

Who experiences the effect, and how does it affect the work

What has already been attempted

What would meaningful progress look like in observable terms

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CONTEXT AND EVIDENCE

Examine the pattern

A repeated concern becomes easier to understand when leaders compare actual situations. Capture enough detail to identify similarities and differences without turning the exercise into a search for blame.

Recent example	What happened	Conditions present	Effect on the work
Example 1 Date or situation			
Example 2 Date or situation			
Example 3 Date or situation			

Look for the exception

When did the same work go well or the concern not occur

What was different about expectations, ownership, timing, information, resources, or leadership support

Which existing strength should be protected or used more intentionally

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ROLES AND DECISIONS

Clarify who owns what

Repeated escalations and handoff failures often involve unclear decision authority, overlapping responsibility, or different expectations about communication. Use the table to make the current arrangement visible before redesigning it.

Decision or responsibility	Who decides	Who contributes	Who needs to know	Where confusion appears

Questions for leadership alignment

Which decisions keep returning to senior leadership, and why

Where do leaders appear to agree on the goal but differ on priorities or follow through

What shared agreement would make ownership clearer in daily practice

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CHANGE READINESS

Determine whether the change can take hold

Announcing a new process is different from making it usable. Consider each condition below. Select the description that best reflects the present state, then record the evidence supporting your choice.

Condition	Needs attention	Developing	Consistently present
The expected behavior is specific and understandable	☐	☐	☐
People understand why the change matters	☐	☐	☐
Decision authority and ownership are clear	☐	☐	☐
Time, tools, information, and support are available	☐	☐	☐
Leaders model and reinforce the agreed practice	☐	☐	☐
The organization can observe and learn from use	☐	☐	☐

Which condition is most likely to prevent adoption

What evidence would show that the agreed practice is becoming part of everyday work

What support must be in place before asking people to do something differently

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LEADERSHIP CONDITIONS

Examine the leadership environment

Organizational patterns are shaped by systems and by the leadership environment surrounding those systems. This reflection is not an invitation to assign blame. It is an opportunity to examine how priorities, behavior, communication, and follow through influence the work.

What does leadership currently reward, reinforce, tolerate, or unintentionally make difficult

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Where are leaders sending different messages about the same priority

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Which concern requires a shared leadership agreement rather than an individual correction

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What part of the situation is within your authority to address

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What conversation, decision, or boundary have you been postponing

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Executive reflection

An executive may need structured space to examine a decision, leadership expectation, delegation practice, or role transition. Individual advisory can be appropriate even when a broader team engagement is not needed.

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EFFECTIVE STEP FORWARD

Move from understanding to action

Choose one focused step that can improve clarity or produce useful evidence. A practical next step should have an owner, a realistic time frame, and a clear way to observe what happens.

Our current understanding of the recurring concern

The one condition we will address first

The action we will take

Owner	Contributors	Start date	Review date

What we expect to observe if the action is useful

What we will learn if the concern continues

When and how we will review the result

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CHOOSING A STARTING POINT

Match the need to the work

The right starting point depends on the concern, the people affected, the available evidence, and the organization's readiness. BTP scopes each engagement after understanding the context.

When the primary need is	A possible BTP starting point
Understanding recurring operational, communication, culture, or workforce concerns	Organizational Effectiveness Assessment
Creating shared expectations for priorities, decisions, accountability, and follow through	Executive & Leadership Team Alignment
Helping an announced initiative become usable and consistently adopted	Change Implementation & Adoption
Examining an executive decision, role transition, delegation practice, or leadership expectation	Executive Advisory
Strengthening connection, reflection, and everyday culture practices through a guided experience	30-Day Connection & Culture Experience

Questions to bring to an introductory conversation

- What keeps recurring, and how does it affect the organization
- What has already been attempted
- Who is affected and who has authority to act
- What evidence or examples are available
- What would meaningful progress look like
- What time frame, resources, and decision process shape the work

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CONTINUE THE CONVERSATION

Bring the challenge and begin with the context

Beyond The Pattern helps leaders and organizations recognize recurring patterns, strengthen leadership alignment, improve organizational effectiveness, and support meaningful change. The work begins by understanding the concern, the operating environment, and what the organization is prepared to address.

Request an introductory conversation

Share the concern you are seeing, what has already been attempted, and what meaningful progress would look like. BTP will help determine whether an organizational engagement, executive advisory conversation, facilitated experience, or another next step is appropriate.

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About Beyond The Pattern

Beyond The Pattern is a human and organizational development firm. Its executive and organizational development practice supports leaders, teams, and institutions through evidence informed, human centered, and practical approaches to development, renewal, alignment, and change.

Practice leadership: Scholar Elkins™ | Author | Speaker | Scholar-Practitioner

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