

## Video Transcript: “The Client Who Fell Through the Cracks – What Happened?”

[https://youtu.be/ qztHqUITRs](https://youtu.be/qztHqUITRs)

**Mary Gentile:** [00:00:00] Welcome back. What kinds strategies did you come up with for Susan? Did you come up with anything that you think actually might be effective for ways that she could proceed in talking to her boss about this challenge?

Well, let me tell you what she actually did do. Susan knew she didn't want to deceive the client, but for all the reasons that we mentioned earlier, she wasn't sure how to proceed. So she decided to check her instincts. The first thing she did is she went and she talked to one of her coworkers and she said, am I wrong here this doesn't feel right? Her colleagues said, no, of course, you're not wrong, this isn't appropriate. But they both felt that if she said no to her boss, her boss was probably going to go ask one of her colleagues to do it. They didn't know that just simply saying no would be a very effective way to address this situation. It would [00:01:00] harm Susan's relationship with her boss, it would put one of her colleagues in a difficult situation, and it wouldn't in the end, help the client. That didn't seem like the way to go.

She thought about it for a while and eventually she came up with this strategy. She went to her boss and she said, look, I really don't have time to come up with an effective set of slides and a deck and a script for this afternoon that will achieve what you've asked me to do. But what I can do and what I have done is to prepare a set of slides, a deck, and a script that explains exactly where we went off track each time, why we went off track, and what we're going to do going forward next quarter to correct that situation. She gave him the script, she wasn't sure if he would accept it, but he said, well, okay, I'll try it. He used it with the client and the client wasn't thrilled, but the client accepted it as well. [00:02:00]

In the end, Susan felt that what she needed to do was to realize that her boss was not invested in being unethical. What he was invested in was in figuring out a way, how to get through a very difficult conversation. What she did, she solved his problem, but she did it in a very different way than the way he had asked. She took all of those reasons and rationalizations for why we can't act on our values, and she used them as the grounds for acting on our values. Time is short, often we use that time pressure as an excuse not to act on our values but she used it as a reason to say, look, I can't come up with something that's convincing in this time frame. She didn't know her boss very well and so she felt she wasn't quite comfortable having a heart to heart conversation with him, so she gave him another way to deal with it. She gave him a way out, a way to save face.

Some people will say, [00:03:00] she didn't really name the ethical issue. This isn't really acting ethically. But Susan believed that her boss knew why she was uncomfortable with this. But she also gave him this graceful way to get out of the situation and she felt that she was building the foundation for them to have better collaboration in the future. All of these things work together now, we don't mean to say that this strategy will work in every situation with every individual part of what you're going to learn during the course of these several weeks of this course is that you need to assess what's at risk for everyone involved, what's going on, and address situations uniquely to the moment. But this is how Susan was able to navigate this situation.

I'm curious, what do you think are some of the lessons from this example? Were you surprised by what Susan did? Were you surprised by the outcome? Did her script and [00:04:00] strategy reflect in any way what you had come up with? Sometimes when I share this story with people, they'll say, well I would go to him and I'd point to the rules or to the code, or to the organizational code of ethics. That may be a

strategy in some circumstances. But Susan tried to figure out a way that felt comfortable given the reality of her relationship and the timeline and the moment. I'd like you to take a little time after you finish this video and think about what are the takeaway lessons for me, from this story?