



Shadowing – Expectations for hosts and shadows

Shadowing provides an individual with a unique opportunity to find out how other leaders operate and what their roles involve. It develops a deeper knowledge and understanding of other roles and functions in other organisations.

Roles and responsibilities

The host

A host is the person who agrees to be shadowed. This role does involve some preparation and thought and is not just about having someone follow you around for an agreed time span.

A host needs to consider if the time requested is the best time for the shadowing to take place and how long shadowing should last. They will also need to take into consideration their work obligations and ensure that the shadowing experience does not get in the way of their day to day responsibilities.

A host should:

- Provide the shadow with a timetable for when the shadowing will take place.
- Agree a suitable time dependent on the shadow's objectives and the service needs in the host area.
- Prepare an area for the shadow to be placed.
- Ensure other colleagues are briefed about the shadowing experience.
- Provide time between sessions or prior to sessions for questions and feedback.
- Provide the shadow with information relevant to what the shadow will be observing.
- Provide appropriate notice if the shadowing activity needs to be cancelled or changed.
- Provide feedback to the shadow.
- Ensure they discuss any disability or other requirements with the shadow in advance of the placement to ensure there is enough time to put adjustments in place.

The shadow

A shadow needs to consider why they are doing the shadowing and what they hope to achieve. They will also need to do some preparation which will involve working with the host prior to the shadowing to make logistical arrangements and set objectives for the sessions. Following the shadowing it is important to review and discuss the experience.

A shadow must:

- Maintain confidentiality at all times.
- Show tact, discretion and awareness and if required withdraw from situations when circumstances deem it appropriate (e.g. meetings that evolve into sensitive, personal or private conversations).
- Ensure that they show good time keeping and inform their host if they are unavailable for any reason.

A shadow should also:

- Provide the host with an outline of what they are expecting from the shadowing prior to the shadowing taking place.
- Provide their host with feedback and reflections on what they observed.
- Ensure that work colleagues back at their 'day job' are aware of their absence and what cover is required.



- Discuss any disability or other requirements with their host in advance of the placement, so that the host has enough time to make arrangements to maximise the benefits of shadowing, and ensure their safety.

Benefits of shadowing for hosts and shadows

Benefits for the host	Benefits for the shadow
Network with individuals from different areas.	Understand how other organisations work.
Share their experience with others.	Learn from the experiences of other individuals who they don't work with.
Learn from their shadow.	Understand and appreciate how other roles support their organization.
The opportunity to view and reflect on their own area of work supported by the "fresh eyed" view of the shadow.	Understand and appreciate other needs and priorities outside of their own work and organization.
Develop their coaching/mentoring skills.	Opportunity to discuss their role and its needs and priorities with others.
	Understand why things work the way they do.

Different types of shadowing arrangements

Observation – 'fly on the wall'

The shadow will spend the agreed period observing the day to day work of their host. This may involve a range of activities such as attending meetings, watching interactions with customers, etc.

If the shadow is looking to gain a greater understanding of what the host's role consists of then the experience should be designed around a typical representation of what the host does on a daily basis. The host will provide opportunities for questions and a debrief to ensure that both parties benefit from the shadowing.

Regular briefings – 'Burst Interactions'

The shadow accompanies the host for specific activities over a period of time which are all preceded by a mini brief and follow up debrief. This requires communication of the dates and times of specific activities which are of value in understanding the role of the host and development need of the shadow.

This type of shadowing provides short periods of focused activity, rather than passive ongoing observation; this format needs careful timing and planning.

Hands on – 'job sharing'

This is an extension of the observation model, where the shadow begins to undertake some of the tasks they have observed. This provides the shadow with hands on experience of the role whilst having the safety net of being closely supervised by the host. This is not always possible and would need to be discussed on a case-by-case basis between the host and the shadow.

The host and the shadow should discuss what arrangement will be most suitable given their contexts and different needs. It may suit both parties to create their own hybrid approach, e.g. splitting the shadowing opportunity up over a couple of days that better suit both parties.



Planning a shadowing experience

What should the host and shadow think about before the session?

Questions for the host	Questions for the shadow
When is the best time for a shadow to get a good overview of the role?	What do I want to know about the job?
What do I need to inform the guest of prior to the shadowing?	What questions do I want to ask?
Do I need to let anyone else know that the shadowing is taking place?	What do you want to know about the leader, their team or organisation?
What does the shadow hope to get from the process?	What do I know already about the leader, their team or organisation?
What do I need to know about them?	Are there any special requirements (such as dress code)?
Do I need to complete any health & safety requirements prior to the visit?	Are there any specific tasks or elements of the job you would like to see above all others?
Do they have any additional support requirements that I need to be aware of?	What will I do as a result of this shadowing? (including how I will feed the learning back to my organisation?)

Shadow Experience Planner

The host and shadow should discuss the following items in this checklist:

Who is the host?	
Who is the shadow?	
What does the shadow want to experience or observe and why?	
When is the best time for shadowing?	
What type of shadowing is most suitable (e.g. fly on the wall, burst interaction, 'hands on', other?)	
What additional expectations need to be communicated and agreed (e.g. treatment of confidential information?)	
What is the best way to contact each other in case of disruption?	
How and when will we review the shadowing experience?	