Coaching Case Studies

Coaching Case Study #1: Leadership Competency Development

The Challenge
- SVP level within major Financial Services Firm. His goal was to develop key leadership competencies to assist him in his goal of being ready for promotion to MD level within 12 months.

The Process
- Assessed skills and capabilities via 360 facilitated feedback and observation with focus on Influence, Relationship Building and Presentation. Determined how he could leverage other stronger competencies to support his development (e.g. Strategic Thinking and Execution).
- Worked together over a 10-month period via in person coaching sessions and observation. Introduced tools and processes to develop the 3 Leadership competencies

Results
- Re-evaluated key leadership competencies post-coaching via facilitated 360 feedback and observations.
- Demonstrated significant improvement in 3 focus areas.
- Promoted to MD level within 6 months

Coaching Case Study #2 Career Planning

The Challenge
- High performing Director in a Global Financial Services firm who was at a crossroad in her career. Options included:
  - Staying in her current role
  - Taking on a new role that allowed her the opportunity to lead a small team
  - Moving to Latin America with more responsibility but less visibility in the firm
  - Setting a strategy for promotion to MD, remaining in the NYC office.

The Process
- Assessed skills and capabilities via personal SWOT analysis, leadership assessment tools and leadership style inventories.
- Gained clarity on her career direction: Established a goal of being put on the MD “promotable list” by a specified date.
- Involved her Line Manager in the process
- Focused on:
  - Leadership presence
  - Understanding the political landscape
  - Building her network and identifying “champions” or “career watchers”

Results
- Achieved coaching goal - promoted to MD level within 12 months
- Identified internal and external mentors/champions
- Now leads the Women in Leadership Network at the firm
Team and Leadership Development Case Study

The Challenge

- Newly appointed Director of Manufacturing for a Medical Diagnostics company wanted to “build the bench” and develop a strong sense of teamwork with his direct reports.
- His goal was to ensure that his team made a real and lasting difference to the business by learning new skills that would drive improved business performance.
- Our collaborative aim was to be able to demonstrate that improved leadership and team performance relates directly to improved business performance.

Key Focus Areas:
- Personal Development
- Team Development
- Operational Improvements

The Process

- 10 month program (see ppt graphic)

Results

TEAM RESULTS

Team Operating Principles were defined at the onset of the journey. They rated themselves on a 10–point scale at the onset and at the close of their journey. Focus areas included Communication, Celebrating Success and Innovation.

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<th>February ’08</th>
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OPERATIONAL IMPROVEMENTS

Goals:
- Save $250K across Operations in 2008
- Inspire company wide cost savings initiatives

Successes:
- Over 50 separate ideas identified
- Over $350K of realized savings to date
- Over $850K of annualized savings to date
- Company-wide operational Efficiency Program Created and launched in January 2009