



### Coaching - Financial Services

#### Business Context/Background

The organisation, a large multinational financial services institution, had recently experienced two waves of redundancies at all levels across the business which affected morale, culture and structure. To support the changes a number of major infrastructure projects were initiated and business was expected to continue as normal during this period.

#### Summary of Coaching Content

The coachee was a Director of a strategic support function who had recently been assigned a new manager. The coachee was having difficulties in connecting effectively with his manager. In particular, he needed to gain clarity around his business scorecard objectives for the coming year and also wished to be given specific and constructive feedback about his style and performance as a senior leader. In addition he wanted to work on building his influence and impact with key stakeholders in order to strengthen his personal brand. He realised that he needed to be seen as a leader who “delivered the goods” despite having to operate within a context of constantly shifting initiatives and priorities.

#### Business Value Obtained from Coaching / Individual Coaching Outcomes

The coachee was encouraged to focus on the aspects of his relationship with his manager which he could influence, rather than feeling disempowered by the fact that he couldn't change his bosses' behaviour. The coach worked with him to analyse his personal influencing style and self-belief, both challenging and supporting him in seeking out hard evidence from stakeholders about what they valued and expectations he needed to fulfil. This threw up some key areas for development including personal organisation and in particular the way that he ran meetings and perceptions of a lack of drive. The coachee addressed these issues by pinning down very specifically the habits he needed to change and worked on achieving those changes in “bite-sized chunks” over a period of three months. In addition the coachee drew up his own annual objectives with very distinct measures of success which he then got signed off by his manager.

As a result of the coaching, the coachee felt much more in control of his destiny in the sense that he had established the business's expectations both of what he was required to deliver and how that was to be done. His relationships with certain stakeholders were enlivened by the openness and trust he had demonstrated in seeking their feedback. Business meetings which the coachee owns are perceived to be much more effective and efficient in delivering key outcomes and this has had a positive impact on the coachee's brand as a leader who demonstrates energy and focus in the delivery of targets. The coachee has also had an opportunity to review and analyse what is really important to him when the time comes for a career move and has a strategy in place for making this happen.

A horizontal banner image showing a blurred office scene with several people working at desks. The text 'Coaching - Financial Services' is overlaid in red on the left side of the image.

## Coaching - Financial Services

### **Business Context/Background**

The company was a Financial Services institution just recovering from a major recession and downsizing and therefore had to maximise the performance of all remaining staff and ensure that they were well placed to bounce back when the markets improved.

### **Summary of Coaching Content**

The client had been with the company for a number of years and had successfully settled into a senior analyst role. A recent 360 appraisal had however raised a number of issues primarily around the client's communication skills and style. It was felt that this could be addressed in a 1-1 coaching programme. After the initial 'chemistry meeting' however, the coach suggested that the issue was not just about the client's communication style. There were also challenges around impact on some key stakeholders and nurturing certain internal relationships. These were addressed at the first main coaching session and an action plan agreed which put the client firmly in the driving seat to proactively manage some identified relationships particularly with internal customers. Specific coaching was also provided on building additional communication skills using real life and real time business opportunities.

### **Business Outcomes / Individual's Outcomes**

The client's performance improved after the first coaching session and continued throughout the programme – evidenced by positive feedback from key stakeholders and the client's boss.

The company demonstrated support for the client by making provision for two new recruits to be found for his team – not a trivial gesture during the tricky times experienced. The client himself said he had more confidence (as a direct result of the coaching programme) and was able to engage with some of the more tricky internal customers at a higher and more productive level.

A blurred background image showing several people in an office setting, likely engaged in a meeting or collaborative work.

## Coaching – Government Administration

### **Business Context/Background**

The client came from a Public Affairs role in Financial Services and, following a redundancy, moved into an advisory role in the Government Administration industry. The role was converted into a permanent position with a view to the client developing and launching a new citywide initiative and ultimately taking responsibility for its running. A particular challenge for the client was to navigate the successful integration of two other long-standing 'quangos' into the scope of the new initiative.

### **Summary of Coaching Content**

The client was interested in the dynamics of moving from a contract to a permanent role in the same team and making the required impact in the new job. It was also relevant to note that this was the first time the client had effectively run a show on his own (both in charge of a complex launch programme and preparing for a CEO-type role). As such, we worked on stakeholder management; project planning; and communication strategy as part of a truly business-focussed coaching programme. The coaching sessions also covered influencing styles and techniques.

### **Business Value Obtained from Coaching / Coaching Outcomes**

The business benefited from the additional skills that the client employed during the time-critical build and launch period which added further confirmation that the company had selected the best individual for the dual role required of him.

### **Business Outcomes / Individual's Outcomes**

The client established himself rapidly as an assertive programme leader and the launch of the new initiative was on time and well received. His subsequent appointment as director of the new enterprise was both a personal and business success and the client absorbed new skills and techniques (covered in the coaching programme) into his already considerable portfolio of strengths.



## Coaching – Financial Services

### Business Context/Background

Building on an established commitment to personal development, a large international investment bank was considering a programme of executive coaching support for their Directors of Research and Fund Managers. Up until this point coaching was undertaken on a reactive basis, in response to issues or specific organisational changes and the organisation was keen to adopt a more structured approach to coaching; whereby a shared framework could be used across different teams to achieve coaching success.

The organisation was seeking a bespoke and flexible approach which would:

- Explore how to get the best from people by recognising that different approaches are needed for different people based on their personality, motivations and aspirations.
- Assist individuals to have a clear sense of who they are as a person, including what motivates them, and how this relates to future career options.
- Identify and remove self-limiting beliefs that may hinder future potential being realised.
- Establish a coaching framework for senior managers who are currently coaches. This framework would then provide structure to the process while still allowing for individual coaching styles.
- Enable individuals to understand what works best for them, in terms of effective learning, in order for them to achieve personal career goals whilst retaining a continued focus on business objectives.
- Build individuals up to same management standard, developing a consistent approach to achieving objectives.
- Compliment the International Career Development Programme established for high performing-high potential individuals.

HDA won the opportunity to provide this coaching support across the varying levels and business areas within the investment bank.

### Summary of Coaching Content

Ensuring that no conflict existed between the objectives for coaching and the objectives of the International Career Development Programme (running simultaneously), HDA developed a structured coaching programme, across either three or six months depending on individual requirements. The programme consisted of the following stages:

#### Stage 1: Diagnostics and Objective Setting

A full brief was obtained from HR on each individual to be coached. In addition, at the commencement of the programme, the Coach met with the Coachee's manager in order to obtain their perspective on the individual's strengths, priorities for future development and desired objectives to be achieved from coaching.



Each Coachee was then invited to complete a psychometric profiling tool (MBTI or Insights) as well as a motivational tool (Motivational Maps). The information this generated, together with any 360-degree feedback, was used as the basis for the first meeting. During this meeting, the coach worked with the Coachee to obtain their perspective of their strengths and weaknesses, their understanding of the job requirements now and in the future, their aspirations for future roles, preferred management style and also assessed their motivation for change. At this meeting, coaching objectives were agreed and quantitative and/or qualitative measures identified in order to track progress against the objectives.

### **Stage 2: Provide Coaching**

The coaching sessions were provided face to face over a period of three/six months; with one session per month. Each session typically lasted between two-three hours, with a range of outputs, including (practical) behavioural and commercial leverage objectives. Support was available between sessions by telephone or email, as required and face-to-face sessions were converted into telephone-based sessions where opportunities for face-to-face activity were limited by client time pressures, etc.

### **Stage 3: Evaluation**

Part way through the coaching programme, a review was held to ensure that the Coachee was happy with the progress being made and the coaching approach being provided. A six monthly review was also held with HR to update them on general organisational themes and individual progress (within the bounds of client confidentiality). At the end of the coaching programme, the Coach obtained feedback from the manager (where appropriate), and this was then used as part of a final meeting with the Coachee. The final session measured the progress against the desired outcomes and original objectives and “next steps” were agreed.

## **Business Value Obtained From Coaching/Coaching Outcomes**

All of the organisational objectives were achieved and the response to coaching, across the business, was overwhelmingly positive. HDA established a coaching framework within the organisation which not only allows the organisation to employ external coaches where required but also provides internal coaches with greater structure, while continuing to allow for personal coaching style. The organisation is now confident that all coaching undertaken adheres to a formal structure and process which recognises that different approaches are needed for different people based on their personality, motivations and aspirations. In addition a number of specific business benefits were observed at both a departmental and organisational level, including:

- As a result of the coaching, individuals were more comfortable with the turbulence in the investment markets and continued to make good investment decisions during this time.
- Communication channels were opened up between peers and role models about their approach to work; providing individuals with much needed insights into alternative approaches to work which facilitated the development of improved personal strategies for future success.
- As a result of time management coaching, individuals were then able to achieve more in the time available and became more focused.
- HDA Coaches worked with individuals to develop strategies for individuals entering new roles; ensuring that they made maximum impact within their first 90 days.
- Through the coaching a temporary internal appointment was validated, which eliminated the requirement for an external recruitment process to take place.

A blurred photograph of an office environment, showing several people working at desks with computers. The image is semi-transparent and serves as a background for the title.

## Coaching – Financial Services

### **Business Context/Background**

A team of newly promoted fund managers, within a leading investment bank, were already receiving professional and personal development via an in-house training programme. However, the organisation was keen to provide additional and a more tailored programme of support through coaching. HDA was commissioned to provide this coaching support.

### **Summary of Coaching Content**

Although, one of the fund managers that HDA was asked to work had an exceptional investment record to date; both he and the organisation recognised that there was a real possibility that some of his investment decisions were likely to fail since this is usual at some point in a fund manager's career. HDA's brief was to help the individual deal with the possibility of failure, be able to make good decisions through what was likely to be a stressful and uncomfortable time, and to be able to frame any setback in context.

### **Business Value Obtained from Coaching / Coaching Outcomes**

As a result of the coaching, the individual was more comfortable with the turbulence in the investment markets following the near-collapse of several banks and he continued to make good investment decisions during this time.

For the first time he felt able to talk to his peers and role models about their approach and this provided him with some much needed insights about his way of working and his mindset. From this he was able to develop personal strategies for future success.

### **Business Outcomes / Individual's Outcomes**

On a personal level, he obtained a better work/life balance and he recognises that this as something he must retain to ensure his long-term success with the company.



## Coaching – Financial Services

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### **Summary of Coaching Content**

HDA was asked to work with a fund manager who had an excellent investment record to date, and yet struggled to pull himself out of the detail in order to work across a fund. His immediate need for support and coaching was to help him manage this balance between having a global view and a detailed eye. His secondary coaching need was to develop personal strategies to enable him to attain his next promotion.

### **Business Value Obtained from Coaching / Coaching Outcomes**

As a result of the coaching, this individual became more aware of his preferred ways of working and recognised that, on occasion greater effort would be required to work in a style which was not so comfortable for him.

The individual was able to achieve more in the time available and became more focused.

He also recognised that in his new role he would have a greater reliance on the information being provided to him by a team of analysts and he would need to build trust with this team quickly.

An unexpected outcome of the coaching was that the individual re-discovered his passion for the role and felt more loyal to the company.



## Coaching – Financial Services

### **Business Context/Background**

A major financial investment bank has been keen to support a senior team of Directors to work together more effectively to achieve both team and business objectives. The team had recently been through some changes including the addition of a new team member from an organisation with a very different culture and approach to working. As the individual had been with this organisation for over 20 years, he would need to refine his skills and capabilities to meet the expectations and demands of the new operating environment. HDA were commissioned to support the Director to be successful and make an impact in his new role.

### **Summary of Coaching Content**

HDA undertook a 6 month coaching programme with the Director to explore his managerial and leadership style in this new context and find ways of getting things done - including influencing, building relationships and making an impact whilst remaining authentic and true to his own values and attitudes.

The Coachee was also taking on a global training role and used the sessions to explore current thinking around adult learning and behavioural change.

### **Business Value Obtained from Coaching / Coaching Outcomes**

The coachee explored and evaluated his personal preferences around influencing, communicating and building networks. He quickly established himself as a valuable member of his peer team and as someone with credibility and authority amongst junior staff and senior stakeholders alike. He is now used as an expert resource within the business whilst at the same time being seen as approachable and supportive when people need advice and guidance. He has brought an innovative approach to his modus operandi, particularly in respect of developing less experienced staff.

### **Business Outcomes / Individual's Outcomes**

The coachee was relieved and invigorated by the insight and evidence that he could, in fact, operate within this environment in ways which not only delivered the required business results but also could do this in ways which allowed him to be "the real him". This was despite his earlier concerns that he would need to conform and be like everyone else if he was to engage effectively with the business. He grew in confidence in approaching the challenges of raising his personal profile and building his internal networks at all within the company. He also acquired new knowledge around the design and delivery of training and development programmes and insight into the practicalities and value of encouraging behavioural change.



## Coaching - Engineering Sector

### **Business Context**

The organisation was going through a major change programme under the direction of a new CEO. HDA was asked to support a Senior Manager who was struggling to cope with the pressures involved in managing this change and the impacts to her team.

### **Business Issues**

The coachee managed 3 areas of the business – 2 of these areas were operating well albeit with a number of new staff members but the third was going through a period of recruitment following a performance management process that resulted in two underperformers leaving the business. The coachee was tasked with managing the recruitment process while also ensuring minimum disruption to all three areas of the business.

She was under considerable pressure - working long hours and experiencing stress. Her coping mechanism was to withdraw which was not optimal for the business and her team members.

### **Business Value Obtained from Coaching**

The coachee learned to manage the pressure without withdrawing and became much more supportive of her team and consequently easier to work with. Feedback from Directors indicated that she had undergone significant change; with improvements in both her work and working relationships.

### **Business Outcomes**

The coachee was promoted to cover areas of responsibility previously held by her manager who was promoted to Director - freeing up his time to focus on strategic issues. The coachee noted that her improved behaviour at work had gained her recognition from the CEO and Directors. She was now able to network more effectively and represent the organisation at external functions which she was reluctant to do before her coaching programme.

## Coaching - Engineering Sector

### Business Context

The organisation was going through a significant change programme under a new CEO. The individual coachee had been promoted to a much broader and more strategic role and was very anxious about how he was going to achieve his objectives. The organisation commissioned HDA to work with the individual to support him through this complex transition.

### Business Issues

There was considerable concern over the structure of the new organisation and the impact of any changes on staff and member organisations. The coachee was tasked with dealing with these concerns; while simultaneously setting up and running the 6 areas of the business he would oversee.

### Business Value Obtained from Coaching

The coachee learned to trust his own judgement and capability and to delegate more of his day-to-day work to his immediate team. This gave him the time and capacity to focus on his objectives and the success factors that were essential to achieving the change and keeping key staff on board.

### Business Outcomes

The coaching programme enabled the individual to plan his strategy for moving forwards giving him the confidence he needed to achieve his goals.

### Client Comments

*“I was sceptical at the outset about the value of coaching but it brought significant benefits to our organisation. I found it helped me to focus on what is important in my role and gave me techniques to manage more effectively.”*

(Director, Engineering)

A blurred background image of an office interior with several people working at desks.

## Coaching - Financial Services

### **Business Context**

This was a Financial Services institution about to experience the challenges of the 2008 credit crunch. As such they knew they would have to make redundancies and rely even more heavily on their top talent, who were already stretched. The client was fully aware of this context and was keen to do more than simply 'survive'; wanting to excel and increase his value to the organisation.

### **Summary of Coaching Content**

The client was offered a temporary promotion which meant he had to run both his current team while taking on the additional responsibilities of the new role; this required a clear strategy for managing both old and new stakeholders - and this was our initial focus. It then became clear that he was not being given full responsibility for the new role (which he was concerned about) and we worked on his influencing styles and specifically honed his assertiveness to bring a number of key issues to a head. A positive outcome was achieved and he was formally appointed into the new role three months earlier than expected. The remainder of the coaching programme concentrated on his transition into the new role – applying some situational leadership techniques to help develop his skills and confidence.

### **Business Value Obtained from Coaching / Coaching Outcomes**

The business benefited through the independent validation of the temporary internal appointment, which eliminated the requirement for an external recruitment process to take place.

The client established himself rapidly in the new role taking forward his strengths from his previous role and learning new skills relating to leadership and influencing. His profile increased and he bucked the trend of others going through the trauma of threatened redundancies by enhancing his career prospects even further during a very difficult time for him and the business.



## Non Executive Director Coaching – Energy Sector

### Business Context

A major UK energy company decided to introduce a pilot scheme to support key executives in their development by arranging placements as a non executive director (NED). This scheme is done in partnership with the Appointments Commission. HDA were asked to support the first participant in this scheme - a senior IT Executive who would retain his management role in the client company while also operating in an NED role. Therefore he would be required to manage his time carefully to maintain dual focus on both roles. At the time the HDA Coaching Programme was introduced, the client had just been appointed as NED at a local Health Trust.

The main goal for the client was to make an immediate impact in a non executive capacity and add measurable value in a short space of time. As a result, the coaching had a much high mentoring component than most executive coaching assignments.

### Business Issues

The client needed to build a fast knowledge of how a NED works, legal issues, responsibilities and how to work at Board level

In addition the client needed to hone his influencing and networking skills in order to build a good level of trust with his new Board level stakeholders

Finally, the client also has a day job to do and a career to manage! These potential conflicts needed to be examined and careful attention given to prioritising.

### Business Value Obtained from Coaching

Information provided to the client at the 1-1 meeting both confirmed his own research and added valuable new ideas to help him refine and strengthen his approach

Other information provided both at the first meeting and subsequently, gave the client access to additional networking and NED resources

The client was quickly appointed to a number of sub committees and asked to chair a key committee (HR). Guidance was provided to coach him on specific challenges applicable to this role

### Business Outcomes

After six months, the client had both established himself in the NED role and also taken on additional responsibility in the company. He was managing both sets of pressures admirably.

The company seems to have chosen well for the pilot scheme and it is understood they have been approached by the Appointments Commission for further candidates.

## Executive Coaching – Professional services and Engineering Sector

### Background

In July 2007, HDA began coaching a senior executive within the professional services and engineering sector. The overall focus of the coaching programme was to establish clear objectives for moving the executive's career forwards, identifying opportunities for success within the organisation, or, failing this, outside of the organisation

The line manager was fully behind the coaching sessions and hoped that the programme would help to determine the best decision for the executive; a decision that would be based on good reasoning.

The executive's main objective was to gain clarity, certainty and comfort around the next steps of their career.

### The Approach

The coaching programme consisted of 4 meetings, with telephonic support between sessions as required. During the course of the programme the following areas were discussed and reviewed:

- Feedback from the line manager on strengths, areas for development and thoughts about career opportunities
- Review of career opportunities within the organisation – both generalist and specialist, in Ireland and in UK
- Review of 360-degree feedback
- Consideration of what an ideal role looked like based on satisfying current motivators
- Review of what had changed within the organisation
- Review of what aspects of the current role were satisfactory, and what could have been improved (and how this could have been achieved)
- Review of willingness and motivation for change – personally and professionally

### Coaching outcomes

The executive felt that the value of the coaching programme came from the opportunity to talk through concerns and ideas openly with an independent person; something that would not have been possible within the organisation, despite the support from peers and manager.

As a result of the coaching programme, the executive was visibly happier, more engaged and focused. In addition, the coaching assisted them to make some important decisions about their team resources, which in turn allowed a new focus on more strategic matters. Over the course of the coaching sessions, the executive's mindset changed; they developed a different perspective about their position within the organisation and the future opportunities it afforded them.



The executive was asked to complete a motivational questionnaire to identify their top 3 motivators. This information was then used to determine what would need to change about the role in order for them to feel more motivated. At the commencement of the programme, motivation was measured at 62% and by the end of the programme it had risen to 84%.

### **Client Comments**

*“Through discussion with an independent advisor I could make suggestions and talk through scenarios, achieving the optimal solution and thereby feeling rejuvenated. These sessions also allowed me to identify the factors that fall within and outside my control, thus allowing me to focus on issues that that I can directly control.*”

*I would fully endorse the programme and feel that it has proved a tremendous success in allowing me to refocus on the issues that were affecting my career outlook; allowing both the organisation and myself to benefit from the change in my perspective.”*

## Leadership development – Public Sector

### Background

An independent and long-established, non-departmental body had recently launched a revised Performance Management Programme, one which placed greater emphasis on managers and staff discussing performance regularly and also introduced the concept of staff taking ownership of their performance review reports by engaging in self reporting. The organisation felt that Helpline Staff needed some additional support to achieve the objectives of the revised Performance Management Programme. It was decided that equipping Helpline Managers with the behavioural skills required to confidently feed back on call performance to Advisors would positively impact on the usefulness of these performance discussions, and enable continuous improvement.

HDA was commissioned to provide an inspirational training programme for Helpline Managers to equip them with the necessary skills.

### HDA Approach

In order to refine the learning objectives, HDA met with the Strategic Learning & Development Manager and a selection of Helpline Managers from across the UK. HDA also felt it was important to meet with Helpline advisors to get a feel for team personality and energy, additional issues or themes for incorporation into the training programme and also to ensure the programme had relevance and reflected the culture of the teams.

Following the initial exploration and analysis, HDA designed a programme, aimed at enhancing understanding and application of effective coaching behaviours for the Helpline Managers. This programme, tailored specifically to the Helpline function, was highly practical and interactive, with minimal academic input. It centred on a workshop and incorporated development of agreed personal objectives and actions for managing the feedback process.

The workshop presented a number of key learning concepts, while encouraging the use of individual and group exploration into current working practices and also providing an opportunity for skills practice. The key elements of the workshop included:

- *Providing clear guidance on the roles of the coach and mentor, how these are different and how these complement one another*
- *Providing a clear view of what coaching is and what it is not*
- *Exploring specific coaching skills and behaviours for delivering feedback and achieving successful performance improvement in others*
- *Developing a simple and practical personal coaching and mentorship skills ‘toolbox’ for managing Helpline Advisor feedback*

### The Results

Following the workshop, HDA was able to provide the organisation with recommendations on how to further embed the learning from the training event and how to tackle some of the wider departmental issues that were raised in discussion during the training event.



Feedback from the programme included:

***“Useful, relevant and easily understood”***

***“Felt comfortable contributing to the discussions”***

***“The HDA trainer was clearly knowledgeable about the subject and gave relevant examples... talking from personal experience”***

***“All really good and very well delivered...approachable trainer and have given us lots to think about.”***

# Leadership Development to Drive a New Commercial Culture - City Law Practice

## Background

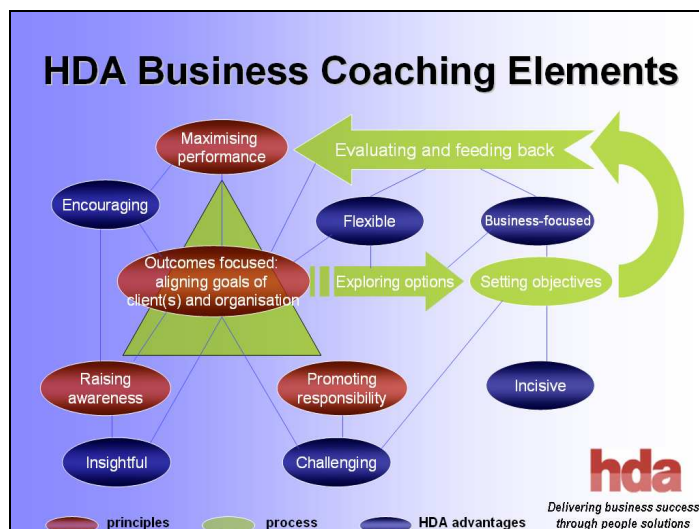
Practice Group Managers of a large city law firm needed to implement significant culture change in order to promote a more commercial and business-focused proposition and brand. This was aimed at improving leadership, to motivate and engage staff in the performance of the firm.

A coaching/leadership programme was introduced with the following aims:

- To encourage initiative, enterprise and business focus.
- To build a coaching style of management to deal with conflict and difficult situations and to plan and implement a large change project.
- To introduce start up coaching for newly appointed team leaders.
- To use a behavioural profile as a means of understanding and adopting positive and productive behaviours.

## HDA Intervention

- One-to-one executive coaching for the practice managers to develop the skills needed to lead change within the organisation.
- Development of a tool kit for the practice managers to use in coaching staff to accept and promote internal change.
- Two day coaching skills training workshops for the practice managers to coach others, in order to cascade a coaching management style throughout the organisation – ongoing telephone support was provided following the training.
- Development of a behavioural profile so that all staff are fully aware of behaviours that are to be encouraged and discouraged.





## Results

- A clear departure from a “command and control” culture to a “coaching culture” was observed following the interventions.
- Practice Group Managers reported that they experienced much less resistance from staff at all levels to the changes that they had to make.
- Practice Group managers reported that they had much greater confidence in resolving staff issues and a higher level of influence.
- General understanding and acceptance of commercial issues improved across the organisation – beginning to translate into higher practice income and new client generation.

## Culture Change / Transformational Leadership - Tertiary Education

### Background

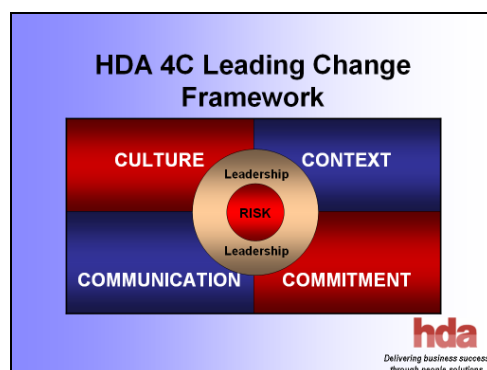
A higher education establishment operating as six independent faculties on different sites. Now moving senior staff to one site and experiencing a great deal of resistance to the changes. Culture of organisation also needs to change to become more commercially rather than academically focused.

A coaching/leadership programme has been introduced and is ongoing, with the following aims:

- To encourage initiative, enterprise and business focus.
- To improve co-operative working between the faculties and maximise use of shared resources.
- To facilitate the physical move to new premises. A great deal of time was being expended on disputes over space and administration.
- To introduce transformational leadership principles to the academic senior management team who were very functional in management style.

### HDA Intervention

- A two day Leadership Workshop introduced all managers to key principles of transformational and transactional leadership.
- Psychometric assessment and 360 degree feedback exercises identified professional development requirements of managers.
- Executive coaching programmes were rolled out, initially to 50 senior managers and now to 300 managers.
- Coaching is supported by half-day “action learning sets” to embed and develop the new behaviours
- Prior to the move, senior staff from across the faculties have recently attended facilitated “appreciative inquiry” workshops to engender team enthusiasm and motivation to overcome difficulties presented by the move.





## Results

A challenging and, at times, cynical group – workshop attendance and coaching are voluntary, uptake is increasing and signs of better teamwork and integration are evident.

360 degree feedback and interview are used as evaluation tools. Evidence from both supports that those being coached are managing both their workloads and their teams more efficiently and effectively.

Although the move has not yet taken place, planning of the move is proceeding with greater enthusiasm and commitment. Departments and faculties are involved in positive dialogue and greater co-operation is evident.



## Executive Teaming and International Collaboration for Growth - International Communications

### Background

The CEO of an international communications organisation and global leader in progressing government de-regulation in Europe, the USA, Asia and Australasia contacted HDA regarding a high-level executive coaching need, following a web search. The organisation was experiencing a specific problem in one of its regions – its largest - and required executive coaching support, linked directly to specific commercial objectives.

HDA was commissioned to work with a key member of the organisation's Global MD's team over a limited period, prior to the commencement of the organisation's business planning process for the next financial year. Specific objectives were as follows:

- The executive (who had a record of significant local successes over many years) was expected to develop her management style to support an objective to double regional business turnover from \$20 to \$40 million over a specified period, in line with a comprehensive global plan. Essentially, failure to adapt from an entrepreneurial but unfocused style which had been successful in the past, to a deliberate corporate approach focused on global growth was likely to lead to a parting of ways – which would have been damaging to the business in the immediate term,
- This change in style was expected to cascade to the level of the executive's local management team, including establishing a business infrastructure which would support the expected growth, and clear accountability for managing this growth,
- It was hoped that this change in style would impact on currently poor peer relationships with the MD's of other global regions, which were currently proving debilitating to the organisation's objective of developing from being viewed as a local operator, to being viewed as an international operator. (This manifested as failures and delays in global agreements, deregulation lobbying targets, etc, which created significant competitive risk for the organisation)

### HDA Intervention

An HDA executive coach worked closely with the executive over a limited period of time (3 months), focused on achieving clear objectives ahead of the key global business planning process, and very positive results were noticeable early on, primarily around the executive's willingness to make a success of her role under very new, closely managed and tougher circumstances.

HDA was next asked to facilitate a teaming event for the entire Global MD's team, including representation from European sites, the USA, Singapore, the Philippines, and Australasia.

HDA focused on the team's commercial objectives in the first instance, and wove these clear commercial objectives into a comprehensive teaming process which was expected to be "tough" at an interpersonal level, given a history of belligerent/partisan relationships and a poor record of shared global successes.

HDA's experience of teaming engagements at senior level is that they are most effective when directly linked to concrete business objectives, and hard expected commercial outcomes. Our expectation is that our client's global MD team was well equipped with core professional skills and were all highly experienced general managers. This principle was key in working with this group.



We also worked off the assumption that the team was well acquainted, and that there was little ambiguity about differences of opinion, individual approaches to business and management, individual commercial philosophies, etc. This being the case, we assumed that norms of engagement, etc. had already been established within the group – ie. this exercise was largely about making an established team identify what it does well, and what it doesn't, with a view to obtaining mutual leverage from one-another individually, from the CEO, and from the MD team as a whole.

At the same time, in our experience, it was nevertheless very useful to give team members an insight into what drives their peers and themselves, in order to help them to manage team relationships more effectively, to identify how best to manage their own personal style-constraints and to leverage members of their team to their advantage.

The facilitated process involved a range of team facilitation tools, with areas of focus initially commercially based, but moving quickly from an analysis of broad commercial concerns, constraints, risks and opportunities, to a broad planning structure for thinking about the global organisation, which took into account both individual and organisational interests – with focus on key agreed objectives. Psychometrics were also used to establish a better understanding of varied but complementary styles within this senior international team – including the CEO.

The focus here was on both the “how” and the “what” – ie. the team was required to work together positively, in order to arrive at team solutions to practical problems identified by the team, and to arrive at practical ideas about leveraging global opportunities for mutual benefit. That is, focus was placed on “how” the team would arrive at answers to a range of issues, which would then become clear team objectives (the “what”); the intention being to put these into action via an agreed team process, despite any personal deviations from the broader team opinion.

## Results

HDA's involvement with this client thus far (ie. individual executive coaching and senior team facilitation around core commercial goals) has been viewed as an unqualified success, and HDA's direct involvement is ongoing, with direct organisational change facilitation support being provided across a number of geographies.

Whilst HDA views the client relationship as “early-stage”, a strong relationship has been developed on the back of HDA's executive coaching and senior facilitation work. Our client's CEO has recently stated:

*"I was hoping for something (when I engaged HDA), but the change has been phenomenal!"*

Other than noticeably improved relationships, (both at the level of the global MD's team, and locally); from a commercial perspective, the key “belligerents” in the global MD's team followed up from the global MD's teaming event by co-landing a key and very elusive multinational project. For once, co-operation had been without friction. This was a major commercial success for the organisation, and it is believed that focus by HDA on interpersonal relationships and behaviour have contributed directly to this success.

Commercially, the local MD's prospects list has improved markedly. Whilst the business is limited by long lead times on deals, progress over the period of HDA's involvement has been viewed as significant. Opportunities are now on the global prospects list which were previously viewed as very “far off”.



## Executive Team Development to Drive Organisational Growth - Financial Services

### Background

A declining financial services organisation was taken over by a new Board and needed a fast and dramatic culture-change to turn around the business. A number of smaller organisations were acquired over a two-year period and growth was rapid. New systems, increased sales and significantly improved customer focus were needed, and a young and ambitious executive team was recruited to achieve these objectives.

### HDA Intervention

- Surveys were used to measure staff and customer satisfaction/expectations.
- Facilitated workshops and focus groups stimulated two-way communication and informed new vision and values.
- Personal development plans and reward systems were put in place to encourage business and customer focus.
- Managing under pressure workshops helped staff to deal with increasing work loads.
- HDA Leadership workshops encouraged team cohesion and performance through improved management.
- Directors and senior managers were coached by HDA's executive coaches to maximise executive focus and energy in those areas most important to the business.

### Results

- The business has achieved target growth and has established itself strongly in both its traditional and new markets.
- Survey results reveal significant improvements in both staff and customer satisfaction levels. Surveys have been repeated over time, and indicate steady progress.
- Directors report that executive coaching has achieved the following:
  - Clarity and focus – clarifying business objectives and focusing energy to achieve them.
  - Communication – understanding how to communicate effectively with the executive team as well as across the business.
  - Improved delegation – passing on ownership and accountability of functional tasks to others, so time is freed up for value-added activities.
  - Improved contribution to executive decisions, by working on method and style of contribution as well as quality of relationships.
  - Improved ability of the organisation's leaders to drive through new organisational changes, including key strategic projects. In this regard, members of the executive have been successfully challenged by their HDA coaches to take on key projects outside of their normal zone of influence.



## Team Facilitation – Manufacturing Industry

### Business Context

One of the world's leading producers of fast-moving consumer goods develops global strategies at the Düsseldorf Head office. The various operating regions are then required to interpret and implement these strategies, taking into consideration individual issues and context.

### Business Issues

The global HR strategy was delivered in the form of a series of OGSAM tables relating to key business issues. These tables specify the Objectives, Goals, Strategies, Activities and Measurements to address key issues. A subsequent HR conference presented these strategies with an explanation of the OGSAM approach.

The Director of HR UK & Ireland wished to engage his management team in the translation of the global HR strategies, while also engendering team working and motivating the team to engage with the strategies. He chose to meet these objectives through a workshop.

### Business Value Obtained from a facilitated workshop

The 2-day workshop comprised of three hours of activity on the first afternoon based around a team building approach. This was followed by six hours of activity on the following day to translate the global strategy.

As a result of the first phase of the workshop:

- The team identified areas where they could work more effectively together and also behaviours which would enable this.
- New team members were integrated.
- The team gained an understanding of the need to recognise the specific issues of the various sites.
- The team highlighted that their regular management could be used more effectively to encourage ownership of and focus on key issues as well as using the considerable expertise in the team.

During the second phase the team focused on the global strategies and developed their own strategies and activities to deliver them. The team identified process and systems issues that need addressing if UK & Ireland are to contribute effectively to the global strategy and the demands for change. Involvement in the development of their own OGSAMs enhanced team motivation to deliver the strategies as well as encouraging a greater understanding of how the team can influence the corporate centre, add value, and also demonstrate that value to their business customers both locally and in Düsseldorf.

### Business Outcomes

The generation of the UK & Ireland OGSAMs will focus the attention of the HR team on delivery that will contribute to the global HR strategy and the corporate change agenda.

In addition, the team is more focused on cost efficiency and the areas in which they can add value to the business.

A blurred photograph of an office environment with several people working at desks. The text 'Coaching – Hotel & Catering' is overlaid in red on the left side of the image.

## Coaching – Hotel & Catering

### **Business Context**

The task of hiring a new Chief Executive, from a pool of 2 internal applicants, to run this expanding and exclusive (UK) based, private boutique hotel chain using a fair (and measurable) recruitment and selection process, whilst retaining the loyalty of the unsuccessful candidate.

### **Business Issues**

To devise and implement a fair selection process based upon the goals, objectives and strategic direction of the business as a whole in the most timely, effective, robust and cost efficient manner. Also to advise on revised remuneration package and benefits of the new Chief Executive.

### **Business Value Obtained from Coaching**

A partnership approach was used to create and implement a new selection process which can be used again in the future. In addition, key talent was retained within the organisation.

### **Business Outcomes**

As a result a new Chief Executive has been appointed and the unsuccessful candidate is currently still remaining loyal to the company.



## Executive Coaching – Mining & Distribution

### Business Context

The client was referred to us by a French business partner. He had recently left a major manufacturing company and was under offer from a global mining and distribution company to head up their strategic marketing division. Unusually, HDA coached the client for an extended period (nine months) in his new role without his employer having any knowledge of the support being given. An additional factor that affected the coaching support was that the client developed an acute medical condition which was treated during the programme but had an adverse effect on his progress in the new role.

The main goal for the client was to establish himself rapidly and effectively in his new role and make an impact that would be remembered.

### Business Issues

- The company had suffered in the past from having a mix of silo-based and global reporting lines which slowed decision making
- The company also had a new MD for the group and a CEO for the division in which the client was appointed. This was already creating tension and some disruption before the client joined
- Other incumbents had been appointed to the role of strategic marketing in the past and all had failed to crack the job; so an interesting challenge for the client to meet!

### Business Value Obtained from Coaching

- The global nature of the role required much international travel by the client and complex reporting structures to adhere to across all time zones. This created much pressure and the early stage of coaching was to help the client organise and prioritise his schedule and focus on only key stakeholder engagement
- As the client became more established it became clear that his natural sponsor (the CEO) was not sufficiently supportive to guarantee success for the client. The difficult decision was taken to leapfrog the CEO and establish a firm base with the Group MD. This was the area where greatest value was gained for the client.
- At the end of the assignment coaching on 'desired outcomes' for a specific major project that the client had been given by the MD was the focus. This involved recognising and building on the client's unique strengths and influencing styles.

### Business Outcomes

- It would be presumptuous to say that the client was firmly established in his new role and that the company had fully embraced his contribution as strategic marketing expert. However, he has a clear strategy to deliver and is clear on the role and support of all stakeholders he needs to manage and influence.



## Executive Coaching – Chemical Manufacturing

### Business Context

The client was a major chemicals manufacturer based in Europe and with a large UK presence, mainly on the south coast. HDA was asked to be part of a beauty parade selection for coaching the European MD and COO. This was managed by the HR contact who drove the initial selection process. This itself caused some initial challenges as it restricted access to the MD and COO. Eventually HDA won the assignment to coach the COO. The business context was that the European masters were putting pressure on the UK in terms of profitability and required a rapid turnaround in terms of results. The COO had been put in charge of this 'turnaround project'. The organisation was managed with an unusual combination of tight hierarchical reporting for mainstream business plus a loose matrix management construct for all project work.

The main goal for the COO was to help him optimise his effectiveness and visibility while performing both a line management and a project leadership role.

### Business Issues

- The COO needed to rapidly develop his leadership skills in order to influence a team drawn from a matrix structure within which he had no direct authority
- The COO also needed help on creating a culture of mutual accountability and support within his own team of direct reports
- The relationship between the COO and the MD was one of 'cosy collaboration' and this seemed to be less than effective from a business results perspective

### Business Value Obtained from Coaching

- Understanding his natural leadership style and building on those strengths and then introducing new ideas for influencing across a matrix structure gave the COO practical techniques to experiment with and feed back during the coaching assignment
- Rapid progress was made with the COO in helping create a new way of working with his team, based on open challenge and a better understanding of each others strengths
- Regular, structured business meetings were introduced with his boss, the MD, and these evolved to incorporate giving and taking of feedback on performance

### Business Outcomes

- The COO and his team stabilised the falling UK results and although the 'turnaround project' was not complete by the end of the coaching assignment, the COO had received (and solicited) strong positive feedback on his contribution
- Moving out of his comfort zone the COO increased his visibility within the organisation and started to network more effectively and advocate his role and position within the wider business community.



## Executive Coaching – Ship Broking

### Business Context

The client was referred to HDA from our American Partners, Challenger, Gray and Christmas on an outplacement programme. He joined a major ship broking company as a short term means of employment to fund his daughters' education in the UK which will last for a further 2/3 years. After that time, the client wishes to embark on a philanthropic venture in Africa. In addition to providing a range of support on outplacement, information on coaching as a career and general career planning, the client was looking for additional 1-1 coaching on a number of personal and business related issues. This brief case study focuses only on the latter.

The ship broking company was a high pressure environment and predominately male dominated. The client held a senior management position in one of the product divisions.

### Business Issues

- The client was mainly interested in making an early impact in the role in a reasonably unfamiliar environment
- The business was expanding into new areas and the client was expected to spearhead one of these initiatives
- The client was entrepreneurial by nature but was also adept at the discipline of presenting a logical argument. He was interested to understand why this approach did not always go down well in the organisation

### Business Value Obtained from Coaching

- Much of the time in the three coaching sessions was spent examining the client's natural influencing styles and exploring the use of less familiar styles in real business situations
- This naturally expanded in to a more in depth discussion around gaining empathy for other styles being used by his peers and seniors and using new techniques in practice in the workplace, specifically Active Listening
- A key exercise that gained significant personal and business value for the client was to record 'battles won' and 'new things learnt'. This gave a structure to his early days at the new company and enhanced the impact he made early on.

### Business Outcome

- The client has now established himself firmly as a key player in his new company and has been 'accepted' as one of the team. He has been able to demonstrate a high level of credibility with customers in a business area previously unfamiliar to him. In addition he has been able to influence peers and the senior team. I to support him in his new venture business plans.

The client found the time with their HDA coach "constructive, developed a good rapport and took away good ideas for development of their plans beyond the UK."

## Executive Coaching – Financial Services

### Business Context

The client was referred to us by our US partner initially to be supported through a career transition and outplacement programme. Due to the seniority of the client and his stature in the UK financial services sector, it was decided to use the Premium Personal Career Coaching service. This involved a co-ordinated set of interventions by both a career consultant and an executive coach. As it transpired, the client was successful in obtaining a new, senior role during the early stages of the programme and, as such, the support transitioned neatly from career counselling to executive coaching support for the client in his new role. His new organisation is a trade association and lobbying body for a wide range of providers of financial services to private clients.

The main goal for the client was to establish himself quickly in his new role as Deputy CEO and help his organisation revive itself following extensive organisational restructure.

### Business Issues

- The client had a number of different constituencies that needed clear direction and leadership; and this had to come from the client's organisation
- In addition to the client's new role (as deputy CEO), the CEO had recently been changed and the client therefore had to collaborate closely with his boss, both of whom were relatively new to the organisation.
- The client also had to motivate and inspire a small team of professionals and help them remain focussed on the new business direction

### Business Value Obtained from Coaching

- Work done with the client during the career counselling phase helped the client review his immediate needs and encouraged him to make early use of his extensive business network. This contributed to him obtaining his new role
- An intensive period of coaching in the client's first few weeks in his new role focussed on making an impact on a number of different fronts. Rapid progress was made with his new team and with his external clients
- In the latter stages of coaching, the focus was exploring how to optimise the relationship between the client and his boss. In conclusion a set of actions around mutual support and collaboration was agreed and was starting to bear fruit.

### Business Outcomes

- The client rapidly established himself in his new role and had received a number of unsolicited positive pieces of feedback on his early contributions from a number of senior stakeholders in the industry
- The client introduced new efficiencies into the already tight structure which were well received and long overdue
- The organisation is now being seen as a 'competency-led' organisation with the client and his boss as a double act at the helm rather than a 'personality-led' organisation which had previously been the case.



## **Board of Directors - Coaching during a re-organisation– Manufacturing, Engineering & Technology Industries**

### **Business Context**

The client was an industry body for companies operating in the manufacturing, engineering and technology sectors. The client was planning for a major structural reorganisation; a merger of businesses over an 18 month period. This merger would inevitably result in fewer director-level positions nationwide.

HDA was asked to ease the transition process for the Directors, thus increasing the potential success of the merger, by providing 1:1 coaching during the initial stages of the reorganisation.

### **Business Issues**

- Directors would need to refocus on national strategic issues in order to facilitate the merger of businesses.
- Traditionally operating in silos, undertaking polarised departmental activities, the challenge moving forward was to begin to work together as a team.
- Good communication and leadership skills were required to influence decisions nationally rather than locally.

### **Business Value Obtained from Coaching**

- The initial passive attitude of “We can only wait and see what happens” was diminished as a result of the coaching.
- Through coaching, actions have been identified that can be taken now to maximise the success of the reorganisation and raise the profile of the Directors.
- A strategy and a new business model have been initiated that will lead the new business into the future.
- Ways of maximising individual and collaborative success have also been instigated.

### **Business Outcomes**

- There is a great deal more energy and a much more positive attitude towards the merger because of the focus and strategy that coaching has contributed.
- As the structural reorganisation continues to unfold there will now be a faster and smoother integration of the business and a more collaborative and less defensive approach to it.



## UK Board Members – 1-1 Business Coaching - Music Entertainment Industry

### Business Context

The client was a US based music entertainment network with a growing UK and European operation. They were going for growth by both acquisition and market share.

One of the UK Board members (SVP) wanted to increase his personal effectiveness and ensure he was properly equipped to contribute to the growth strategy at the highest level. A key challenge for him was to provide continuing support for the MD while building and leading an Operations and Finance team.

HDA was asked to support the SVP and provide 1-1 business coaching during a period of rapid company growth and organisational change.

### Business Issues

- The SVP was concerned that the local organisation (especially the MD) was too heavily dependent on him which was affecting his ability to perform
- Huge organisational change challenges were being experienced and this required the SVP to help map out the future at a strategic level but also 'keep the ship on course' and motivate his own team throughout an extended period of disruption
- The SVP was keen to help the organisation shift its culture so that people were encouraged to take personal responsibility and learn from their mistakes

### Business Value Obtained from Coaching

- An early 1-1 meeting with the MD helped clarify some of the business issues and provide a broader context for the coaching assignment.
- Immediate help was given to the SVP to recognise that his natural problem solving style was to seek a collaborative win-win in almost every situation. Acknowledging that this approach is a huge thief of time and then trying other, less natural, techniques provided some significant early benefit.
- A key area for coaching was exploring in depth the nature of the relationship between the MD and SVP and recognising that the different individual business backgrounds (one finance based, the other marketing based) 'justified' the dependent aspect of the relationship at one level. Strategies were developed to change the nature of this relationship and simultaneously increase its effectiveness.
- In respect of team management and motivation, the area of Situational Leadership was explored in some depth and new ideas introduced to good effect.

### Business Outcomes

- A smarter way of working with the MD was developed over time which freed valuable time for the SVP to influence the strategy at the highest level, enhance his contribution and gain a new level of respect
- The SVP made changes to his team and introduced new ideas for giving them more autonomy with the dual benefit of freeing up more of his own time and improving the performance and motivation of the team



## General Manager – 1-1 Business Coaching - Internet comparison shopping Enterprise

### Business Context

The client was a US based Internet comparison shopping enterprise. Recently set up in London to blaze the trail in the UK, Europe and beyond, the company installed a General Manager (GM) to build the business and drive sales forward. The main goal for the GM was to create and articulate an 'International Business Vision' and build a team that would achieve this goal. A key challenge was to create an appropriate business connection to the US parent but at the same time build a new business stream with its own identity.

HDA was asked to support the GM in his endeavours by providing 1-1 business coaching to during the initial period of business growth

### Business Issues

- The GM was unclear what 'success' would look like and how he would be judged by his masters in the US. How committed were they to building an 'International' part of the business?
- Communication 'across the water' was not always effective and 'face time' with key executives was at a premium.
- The GM was keen to develop and adapt his leadership style: perhaps lead through questions, not answers, both when managing upwards and also forming and leading his new team in the UK

### Business Value Obtained from Coaching

- The initial concentration was on building a Stakeholder Map and identifying relationships inside the organisation. This resulted in developing individual communication strategies with five key stakeholders
- The next piece of work was helping GM adapt his communication style; understand natural influencing and conflict handling styles and trying new techniques to achieve different, more powerful results
- Specifically, the executive coach worked with the GM helping him develop and present a major internal strategy review to Board members and achieve buy-in to the GM's proposed success criteria
- Using a 360 feedback model to look at the GM's individual strengths and leadership qualities the coach and GM used this information when considering the shape of the new management team

### Business Outcomes

- As the International business took off, the success was recognised by the US parent and the GM and his team were rewarded appropriately
- The strategic model for the International Business was adopted as a standard template within the organisation for all new business initiatives
- The GM made changes to his team and introduced new people with skills and experiences required to take the business to the next stage