

CASE STUDIES

Here are some case studies of the work I engage in, as they show I can deliver value in three key areas:

1. Supporting individuals
2. Working with teams
3. Improving organisational performance.

I hold the ILM Level 7 accreditation in Executive Coaching & Mentoring and now have hundreds of hours of coaching experience. Many of those sessions have been delivered online with no detriment to the individual's experience or what we have been able to achieve. Given this I have now moved my coaching offer for individuals fully online, unless in exceptional circumstances. With team coaching I still recommend a blended approach, combining online sessions featuring interactive breakout sessions, with face-to-face facilitation. This multi-modal delivery offers cost efficiencies for clients, while still delivering the required quality of experience and outcomes.

Whether I'm coaching, facilitating or consulting my commitment to creating an inclusive environment is unwavering. In all of my conversations/sessions I ensure everyone feels welcome and able to be themselves without fear of prejudice or discrimination. I guarantee that everyone involved – from a junior employee to the most senior leader – shares that responsibility for everyone's wellbeing.

1. SUPPORTING INDIVIDUALS

Coaching a Vice Chancellor

The challenge: The client was facing a difficult time with their senior management team and approached me for some coaching around effective leadership.

The approach: I worked with this client, developing a 'safe place' where they felt comfortable exploring their concerns. With a focus on identifying practical ways to resolve key issues I soon became a trusted advisor. There were some tough and direct conversations – this is my style as I don't shy away from necessary, but difficult conversations. Focused on delivering real outcomes, each session ended with two things: a commitment from the client to reflect on a significant issue and one or two practical actions.

The outcome: From these sessions the client formulated strategies to deal with the mix of personalities in his management team. He also determined what shape the team needed to be to ensure operational effectiveness, using this as a tool to plan and instigate his organisational review.

Career coaching to secure new role

The Challenge: Ready to move on, a client approached me after she failed to secure a new job despite a number of interviews. This surprised her as she had an excellent track record and all the qualities/experience required.

Our approach: Career coaching has a slightly different emphasis to other forms of coaching. I started by asking her to be clear and purposeful about her reason for seeking a new job. Helping somebody to understand their motivation is essential, as it will determine their behaviour when being interviewed. I also provided practical support – reviewing her CV and recent applications, checking presentations and conducting a mock interview. My feedback to her was practical and specific – she needed help to conquer her interview nerves and development targeted around her personal leadership skills.

The outcome: The client successfully secured the next role she applied for. This client is not unique, this is a real growth area for me – and one in which I have an excellent track record.

Delivering advisory support for recruitment

The challenge: Recruiting to senior legal and governance roles can be challenging at any time – but it's particularly challenging if you have little experience in those areas. This was the situation my client found themselves in and so asked me to help determine the technical competency of candidates applying for an in-house Counsel role.

The solution: I designed a series of written tests accompanied by marking plans, and a set of practical scenarios to use in the interviews. In combination, these two elements rigorously tested the required competencies. I ran the recruitment process for the client, ensuring equality, diversity and inclusion were key cornerstones of my approach at every stage.

The outcome: The client was very pleased with their new appointee. To help the person transition smoothly into their new role I was also asked to deliver a number of coaching sessions and the appointment continues to be successful.

Executive coaching to support a newly promoted director

The challenge: When a senior leader is promoted to a corporate leadership role the transition can be daunting. As one newly promoted director found, there is lots of scope for self-doubt and a sense that leadership is a lonely role. It was at this point that he contacted me.

The approach: I don't view coaching as a form of therapy but as a way of tackling complex problems to find practical solutions. My 'real-life coaching' is supportive, direct and pragmatic. Most importantly, it is based on the needs of an individual and their situation. My aim was to help this director learn, reflect, adapt and grow into his role. To do this I held six online coaching sessions with him, each lasting 2-3 hours, over a period of ten months.

The outcome: That leader is now regarded as a top performer and has asked me to work directly with his management team.

2. WORKING WITH TEAMS

Team coaching conducted virtually

The challenge: I often work with teams who, while far from being dysfunctional, are struggling to resolve behavioral or operational issues. One specialist technical department felt disenfranchised from the wider organisation and had internal teams that were struggling to communicate effectively with each other. Each team and the department were struggling to perform effectively – this was a situation where team coaching, if done well, can be a really effective.

The solution: First I had a number of productive and focused conversations with key staff across the department to understand the issues. From these conversations I facilitated a team coaching approach, teaching people how to apply it within their teams and when working with other teams. This resulted in a number of decisions being made, and as importantly owned, by those people around better working

practices. The final part of the programme was supporting the department to set up a set of Action Learning Sets, led by them, to keep the momentum and focus on problem-solving and conflict resolution. **The outcome:** Departmental performance was re-established and consistently continues to improve; staff morale and engagement has improved as demonstrated by a significant reduction in staff absence and attrition rates.

Tackling a dysfunctional clinical leadership team

The challenge: I was commissioned by a large NHS department to work with a difficult and dysfunctional clinical leadership team. I'm known for my expertise in dealing with problematic and challenging teams and so I was confident of facilitating a positive change.

Our approach: Spending time with each team member unearthed some core but previously unexpressed problems. My next step was to facilitate a series of difficult, but essential, conversations between team members – an essential step to genuinely address dysfunction. I take great pride in the fact that clients often cite this as something I am particularly good at when recommending me.

The outcome: It's fair to say that this process was demanding for all concerned but it 'kick-started' a new approach from the team and a shared commitment to working in a more collaborative way. This has significantly improved their relationship with each other and the wider organisation.

Building team confidence

The challenge: Often a client will approach me with a request for a 'Team Away Day', but without a clear sense of what they really want. I quickly realised this was the case with a client in charge of fundraising at a hospice. So, I met with the staff involved in fundraising to really understand the root cause of the problem – that donations needed to meet income targets were not being acquired. It was quickly established that the problem wasn't a lack of confidence around asking for donations, but they were lacking the language to use when talking to prospective donors.

The solution: I needed to give the fundraisers a language that they felt comfortable with. For example, instead of asking for a 'donation of £2000', I suggested they should ask a local business to 'sponsor a nurse for a week'. Also, instead of aiming for a 'sale' their objective should be to make a 'good ask' which is thereby more likely to result in a donation. I combined this with a series of observational and participative sessions where staff role-played. A follow-up session four weeks later put staff together with strangers to role-play in a more realistic scenario. Final preparation included filming and the use of mystery shoppers.

The outcome: These adjustments made a huge difference to the fundraisers confidence and skills of persuasion. They are now consistently exceeding their monthly income targets.

Creating a Team Charter

The challenge: There's a common belief that 'if it isn't broken, don't fix it' – but I don't think this applies to teams. In my view, for a team to stay at the top of their game they must continually (or at least regularly) refresh their focus and commitment. This was the case with a team of front line health professionals. They were a well-regarded, successful and settled team, but they risked complacency, had a lack of succession planning and insufficient challenge to keep them improving.

The solution: I undertook a series of interviews with team members to allow me to design a Team Charter Day. During this event I facilitated group work around a set of themes designed to create a 'Team Charter'. This document, written in the language of the team, clearly states how they would work together going forward.

The outcome: The impact of the charter has been significant and exceeded all expectations. Everyone now understands the need to keep improving and they have introduced practical measures like 'job shadowing' and making it a priority to induct new team members into the charter.

Reducing team dysfunction

The challenge: A client came to me utterly frustrated at how poorly a critical customer-facing team was performing. They were in conflict, playing out long-standing grievances and sometimes even refusing to speak to each other! Consequently they delivered poor service to their customers and were greedy in terms of the time and effort they took to be managed. The client thought the only solution was to disband them.

The approach: Aware of how difficult it is to change ingrained behaviour; I knew my approach had to be targeted and focused. So, every five weeks I facilitated a 2-3 hour session with the team focusing on an agreed set of issues. We worked on those problems, refusing to move on until there was some resolution or at least a recognition of the problem. Deliberately I did not attempt to solve all the problems in one go, and over the sessions many issues surfaced and were resolved. The final session, at the team's request, was a planning session where they agreed to a nine month plan of service improvement and team building.

The outcome: The client has reported positive progress and an improvement in customer satisfaction. All thoughts of disbanding the team have been abandoned and instead they are investing in their future.

Developing remote workers into a team

The challenge: It is a fact of life that newly formed teams need time and space to develop and function at their very best. One international client had appointed a new team who all worked remotely. Although their roles were inter-dependent they rarely came together. Having formed, this new team was rather stuck in the 'storming' phase. To move them forward, I was asked to design and deliver a twelve month development programme to help them learn about each other, how to work together and how to celebrate success.

The approach: I asked each of the team to complete a Myers Briggs questionnaire to understand their personality types. This was followed up with a session to help them understanding themselves and their colleagues better. Designed around experiential learning the session used team games and practical activities to prompt reflection and spontaneous discussions about their differences as colleagues.

The outcome: The team started to interact differently having gained a better insight of themselves and their colleagues. They have since designed and delivered events together which played to their known strengths in terms of skills *and* personality. The team continues to go from strength to strength.

3. IMPROVING ORGANISATIONAL PERFORMANCE

Design and delivery of an institutional management and leadership programme

The challenge: A top ranking higher education client, who I have worked with for several years, approached me to design a management and leadership development programme aimed at middle managers.

Our solution: Delivered over a 12 month period the programme started with a 360 degree assessment. The content of the programme focused on areas like Team Leadership, Political Management and Project Leadership. I worked hard to ensure that the content met the needs of those attending and was delivered in a practical and challenging way. To keep things interesting, I included activities like an 'Innovation Lab' to explore problem solving techniques.

The outcome: Repeating the 360 degree assessment 18 months later as a comparative tool showed the programme to be a huge success. The client reports that staff who attended manage better, are more effective leaders and are more willing to apply for promotion.

Strategy creation – leadership team and staff engagement

The challenge: I was approached by a client who had made several unsuccessful (by their own admission) attempts to define the strategy required to deliver a complex health service. They wanted me to work with them to clarify their thinking and engage their workforce to deliver.

Our approach: Firstly, I spent time with each of the leadership team establishing the strategy's purpose and the key aims and objectives. I worked systematically with them to define the required outcomes. Having defined a broad outline, I took this to the team who were going to deliver the services to patients. Doing this proved to be very helpful in terms of engaging people and securing their interest and enthusiasm. This is, in part, due to my use of activities, good humour and fun to bring energy to what could have been a very 'dull' conversation.

The outcome: The strategy was very well received, and my approach had generated a real sense of ownership and commitment from the delivery staff.

Supporting culture change as part of business transformation

The challenge: A large public body asked for my help implementing a cultural change programme as part of a wider business transformation project. Their staff were a little skeptical – understandably as they had only recently been exposed to several, less than successful, programmes of this type.

Our solution: To help people become more open and responsive I spent time with them, simply asking them to express their concerns. I then involved staff in designing the cultural change event days – my aim was to make them active participants, not just delegates at the events. Talking to people I discovered a collective sense of humour which is something that I reflected in their events.

The outcome: The programme was successful, initiating a change in people's attitude, behaviour and working practices. My continued involvement has helped to consolidate and embed those changes.

Governing body strategic review away days

The challenge: I have extensive experience of working with Boards, Governing Bodies and governance systems/processes. It was my reputation in this area which convinced one client to approach me to design and facilitate their Board's 'away-day', ensuring it delivered the required outcomes.

Our approach: The focus of this event was to review past performance, horizon scan to determine future risks/opportunities and determine a strategy for the next 2 to 3 years. To achieve this I facilitated group work and debates giving everybody an opportunity to contribute. Where I really added value was in my testing of assumptions and challenges to the Board and Governing Body until they were clear on their purpose, expectations and outcomes.

The outcome: Such was the impact of the event that, as with many of my other clients, I have been asked to facilitate it annually.