

ANNEXURE ONE

COACHING CASE STUDY

NOTE – This case study is FAR from inclusive of all the coaching processes, dynamics, coaching models, challenges, discussions, and assessments, used in coaching interventions. **EVERY** coaching intervention is unique and therefore varies dramatically from that which is represented below. This case study is merely intended to give you a glimpse, a broad idea, a sense, of how a coaching intervention unfolds and what it consists of. By virtue of the uniqueness of each individual, it does not include all of the coaching processes, coaching models, and assessments used in our coaching interventions.

AREA	DETAILS
Background	<p>A small international finance and investment house with operations in the United States of America, London, and South Africa, approached The (W)Right Coaching CC in respect of implementing a managed coaching intervention for three senior members of the organisation. The clients/coachees within the organisation included the Chief Executive (CE) and two Investment Banking Directors.</p> <p>The broad objective of the coaching intervention was to assist the coachees develop work / life balance and ten year goals, as well as improve their <i>skills, knowledge, and practice / application</i> in the following areas: -</p> <ul style="list-style-type: none"> • Time management; • Work effectiveness; • Delegation of work; • Management style (Including, amongst other goals, faster decision making from the CE, and improved communication between all three coachees {address the existing conflict between the CE and one of the Directors}); • Project management; • Management of teams and work load; • Stress management; • Faster decision making (moving away from avoidance); • Improve their thinking styles and patterns and therefore the results they drew to themselves and the business; • Shift and improve their behaviours and therefore the results they generated on a daily basis for themselves and the business; • Networking; • Marketing; • Extract development areas from their Pre-Coaching Questionnaire's as well as their Occupational Personality Questionnaire assessments and include said development areas into their coaching sessions. <p>This was a HIGH pressure environment with each coachee working between sixteen and eighteen hours a day, six to seven days a week. The Deputy Chairman (who the Chief Executive reported to) expected all members of his team to work these hours.</p> <p>The coaching intervention took place over a six month period.</p>
Synopsis	<p>An insufficiently staffed, demotivated, highly stressed, imbalanced, valueless, finance and investment house carried out a strategically aligned coaching intervention to assist the organisation turn itself around.</p> <p>The customised coaching intervention honed in on trouble areas, highlighted areas of improvement, devised a coaching strategy and coaching process to turn around the 'trouble areas', and then implemented, tracked, and measured the return on investment.</p>

Coaching Process Unpacked

The coaching process followed is outlined in the coaching proposal.

1 & 2. Ground Rules & Briefing Session

Meetings were held with the Human Resources Director, the Deputy Chairman, the CE, and the two Investment Banking Directors. Through these meetings, the following was agreed upon: -

- Carry out a six month (two one and a half hour sessions per month) coaching intervention;
- Use the Pre-Coaching Questionnaire and the Occupational Personality Questionnaire (OPQ32i - SHL) as information gathering and development resource tools;
- The HR Director would be the contact point for the coach (Steve Krummeck)
- The goals (individual, personal, and strategic) for the coaching intervention (and each coachee) were established and documented, as indicated in the "background" section above. These goals were aligned to the strategic imperatives (* refer below) of the Deputy Chairman. The parties involved were informed that further goals would emerge from their Pre-Coaching Questionnaires' and personal assessments (these goals are referred to in step seven below and were included in the overall coaching intervention);
- The Deputy Chairman indicated that feedback should be supplied to the HR Director three monthly in an informal way (not required in writing);
- Due to the number of coaching goals, it was agreed that each executive would prioritise their coaching goals during their first coaching session, which outcomes would be documented, tracked and reported on (reported on every three months) during the coaching intervention;
- The CE and two Directors chose to have a coaching and mentoring relationship (and process) with the coach. It was made clear that the primary approach would be coaching and only move to a mentoring process when agreed between the coach and coachee;
- Due to the high level of the coachees, the GROW and Co-Active coaching models were chosen for the intervention. Some elements of the Results model were also used. This approach would empower the coachees and hold them accountable for bringing in specific coaching objectives into each coaching session.

In summary, the **GROW model** used was as follows: -

Ask - Actively Listen **Through the Application of:**

- | | |
|--------------------|-------------------------------|
| G - Goals | What do you want ? |
| R - Reality | What is happening now? |
| O - Options | What could you do? |
| W - Will | What will you do? |

The model opened up in the sessions as below: -

GOAL

- What is the aim of the discussion?
- What do you want to achieve long term?
- What does success look like?
- How much personal control or influence do you have over your goal?
- What would be a milestone on the way?
- When do you want to achieve it by?
- Is that positive, challenging, and attainable?
- How will you measure it?

REALITY

- What is happening now? (WHAT, WHEN, WHERE, HOW MUCH, HOW OFTEN)
- What is involved (directly & indirectly)?
- What things are going badly on this issue, what happens to you?
- What happens to others directly involved?
- What is the effect on others?
- What have you done about this so far?
- What results did that produce?
- What is holding you back from finding a way forward?

- What is really going on? (Intuition)

OPTIONS

- What options do you have?
- What else could you do?
- What if...? (Time, power, money, etc.)
- Would you like another suggestion?
- What are the benefits and costs of each?

WILL

- Which options or option do you choose?
- To what extent does this meet all your objectives?
- What are your criteria and measurements for success?
- When precisely are you going to start and finish each action step?
- What could arise to hinder you in taking these steps?
- What personal resistance do you have, if any, to taking these steps?
- What will you do to eliminate these external and internal factors?
- Who needs to know what your plans are?
- What support do you need and from whom?
- What will you do to obtain that support and from whom?
- What will you do to obtain that support and when?
- What could I do to support you?
- What commitment on a 1 - 10 scale do you have taking these agreed actions?
- What prevents this from being a 10?
- What could you do or alter to raise your commitment closer to 10?
- Is there anything else you want to talk about now or are we finished?

The **Co-Active coaching model** compliments the GROW model as it encourages the client and coach to use and maximise listening, intuition, action / learning, self-management, curiosity, and balance.

Elements of the **Results coaching model** (as detailed in the book “Quiet Leadership”, by David Rock) were also pulled into the coaching sessions and to compliment the GROW and Co-Active coaching models. In summary the main areas of focus of the Results model applied in coaching sessions in this case study were as follows: -

- Let the coachee do all the thinking;
- Focus on finding solutions to the coachees goals, problems, and or future desired state;
- Stretch the coachee whenever possible;
- Accentuate the positive;
- Put the process before content. That is, stay focused on the process and avoid content taking over / clouding the goals;
- Listen for potential and enable the coachee to expand on their potential;
- Develop a new and more effective way of listening, including anything that may block and or cloud the coachees listening;
- Guide the coachee to speak in order to improve the way they think. That is, coach the coachee to be succinct, specific, and to speak with intent instead of speaking to make an impact;
- Bring about insight for the coachee through skilful questioning which results in reflection in the coachee, illumination, motivation, and then action to move towards achieving the goal the coachee is working on;
- A powerful process to move coachees forward in coaching sessions (an integral part of the Results coaching model), is to explore their current reality, explore alternatives which will assist them achieve their goal, overcome their problem / difficulties, and realise their chosen future desired state, and then move them into taking action. When it comes to taking action, the coachee is moved into committing to specific delivery dates, reporting back on progress in future sessions, and obviously doing something tangible;
- Follow up is essential, especially where the coachee has had insight and has taken action to move themselves forward. Follow up consists of determining the facts behind the action taken by the coachee, and how the coachee felt as a consequence of the achievement (feeling

contributes to the creation of long term memory. Positive feeling deepens the positive wiring. Negative feelings create an opportunity to explore the issue further). Follow up also consists of encouraging the coachee. This encouragement assists the stretch a coach encourages a coachee to achieve. Receiving encouragement prompts the coachee to want to stretch even more. Follow up also entails the coach establishing what the coachee learned as a consequence of taking action. This too strengthens the positive shifts, new habits, new ways of thinking, and new neural pathways in the coachee. Finally, the implications are looked at and a new goal is set.

The bulk of the foregoing was skilfully integrated into the coachees coaching sessions where appropriate.

* **Some strategic goals** (as indicated by the Deputy Chairman)

- Move from a “sleepy organisation” to a fast paced, highly effective organisation;
- Become a highly profitable organisation – improve profitability;
- Improve quality of relationships with clients, prospective clients, the media, and organisations at large;
- Move from an “amateur approach” to match their international operations style and business approach;
- Become the leader in their field;
- “Raise the game” to match their operations in London and piers in South Africa;
- Improve the focus of the three executives and therefore become more “commercially aggressive”;
- Each executive to move from mediocre performance to exceptional performance;
- Each executive to become more effective overall, pace themselves better, and manage more ‘mandates’ (clients);
- Move the executive team out of their comfort zone.

3. Coachee Briefing & Sensitisation Session

Per our coaching proposal, the following was discussed with the HR Director, the CE, and the two Directors: -

An overview of the following was also discussed: -

- What’s coaching,
- How does it work,
- What is the coaching process;
- How to ensure maximum value add – guidelines to ensure maximum return on investment;
- General questions and answers.

Points one to three above are self explanatory.

Point four.

During the “how to ensure maximum value add” section, I emphasised (amongst other points) the need for the coachees to ensure they come into each coaching session with the following: -

- A specific goal/s that they intended to work on during the session (which goal/s should include their primary coaching goals, amongst other coaching objectives that came about since their last coaching session); and
- A summary of what they had been working on since their last session, including progress on their coaching goals.

In addition to the foregoing, the coachees were briefed on the need to carry out substantial work on their goals in between each coaching session in order to maximise the effectiveness of the coaching intervention, as well as attainment of their coaching goals.

The coachees were briefed on the need on their part to be prepared to carry out the following to compliment and build on their coaching sessions. Namely; reading, research, mentoring where suitable and appropriate, and networking with peers to gain insight into the achievement of their own development goals. In essence, the coachees were briefed of the need to do substantial work on

their part in order to achieve their coaching goals.

The coachees were assured complete confidentiality of what was discussed in their coaching sessions. This included the assessment results.

A discussion was held around the fact that ultimately the coachees were responsible and accountable for the success of their coaching journey. They were also encouraged to hold their coach accountable for ensuring maximum value-add during their coaching sessions.

4. Matching coach to coachee/client

The CE and two Directors were given an opportunity to meet their coach one-on-one to ensure: -

- The coachee was comfortable with the coach;
- There was a strong resonance between the two;
- He trusted the coach would be able to assist him reach his coaching goals / desired outcomes;
- An effective and strong working relationship would evolve between the two.

All three coachees were comfortable to be coached by one coach (separately), provided confidentiality was honoured in respect of what was discussed in each coaching session.

5. Coachee's completed the Pre-Coaching Questionnaire

This step is self explanatory.

6. Coachee completed the identified assessment/s

This step is self explanatory. That is, the coachees completed the Occupational Personality Questionnaire online.

7. Coach reviewed the coachee's Pre-Coaching Questionnaire, assessment/s, and prepared to integrate the questionnaire and assessment into the coachee's coaching sessions.

This step is self explanatory.

Having said the foregoing, the following became abundantly clear through analysing (by Steve Krummeck) the information made available in the Pre-Coaching Questionnaires and the Assessments: -

- There was **conflict between the CE and Directors**;
- The CE had to work on **improving his emotional response to dealing with conflict**;
- The CE admitted to **personal weaknesses** which were restricting his effectiveness in his role of CE;
- **Negotiation skills** of the coachees had to be **improved**;
- Two of the coachees had **zero balance** in their lives. Thankfully both coachees acknowledged this and the need for change. As a consequence they were highly stressed, led unhealthy lifestyles, and were operating at a fraction of where they could have been. The CE was the only one of the three coachees that demonstrated he had balance in his life;
- All the coachees acknowledged they needed to radically **improve their networking and selling skills and abilities**;
- All three coachees had **unfulfilled career aspirations** which needed to be addressed;
- Two of the coachees had been divorced twice and one was on his third marriage. This was as a direct consequence of the **lack of balance in their lives**, as well as not knowing who they were or what their core driving values were;
- All three wanted to **define their goals and develop a plan to achieve them** (supported by specific actions to be taken and associated time lines);
- All three coachees needed to **change and improve on their thinking styles and approaches** (all three were predominantly negative and fear based), their leadership behaviours, their leadership approaches and styles (one very autocratic, one laze faire, and one in between),

and their interpersonal skills;

- In respect of their OPQ reports, there was a good balance between the CE and two directors in respect of the following;

Leadership Function	Management Focus (Transactional)	Leadership Focus (Transformational)
Developing the Vision	Analysing & Interpreting	Creating & Conceptualising
Sharing the Goals	Interacting & Presenting	Leading & Deciding
Gaining Support	Supporting & Co-operating	Adapting & Coping
Delivering Success	Organising & Executing	Enterprising & Performing

Having said this though, two Directors came out as being **less inclined to try new ideas and could find it difficult to cope effectively with organisational change**. This would need to be addressed in coaching sessions as the Deputy Chairman wanted the Directors to “up their game”, thus necessitating organisational change.

One Director showed an inclination towards **being too much of a driver** at the expense of employee relationships, productivity, and employee cohesiveness.

Other trends that come up through the assessment were as follows: -

- Too hard on others and self;
- Needs to be more forgiving;
- Needs to be more tactful;
- Stress impacts on relationships;
- Very impatient with others. Just get on with the work and perform attitude;
- Mind dominated by personal issues.

An important point to note was that **the two directors came out stronger in managing than leading**. The CE had a good balance between the two. The current operating climate necessitated a manager approach as opposed to a leadership approach. The business would need to be ‘reengineered’ to facilitate an opportunity for the two directors to move more into a leadership role (which the Deputy Chairman also wanted).

8. Assessment feedback session to coachee by the psychologist/consultant

The coach (Steve Krummeck) and the Clinical Psychologist prepared for this session, during which, much of what Steve Krummeck picked up in the assessments, was confirmed and raised by the Psychologist as items to raise and discussed during the one-on-one feedback sessions.

The Psychologist gave feedback individually to each coachee. These were interactive sessions where the coachee, the Psychologist, and the coach discussed the outcomes of the assessment. Much of what’s indicated under point seven above, became coaching goals for each coachee, which were then added to the goals indicated in “Background” above.

9. Eight month coaching intervention commenced

Through consultation with the Deputy Chairman and the HR Director, as well as discussions in the coachees first coaching sessions, the **following consolidated list of coaching goals was drawn up**. Part of this process was to prioritise the many coaching goals that emerged through our engagement process. The following is the prioritised coaching goals list: -

Priority coaching goals chosen by all three coachees included the following.

- Improve networking;
- Improve marketing and selling;
- Improve negotiation skills;
- Improve their thinking styles and patterns and therefore the results they drew to themselves and the business;
- Move away from fear based thinking;
- Stress management, including the negative effect stress has on interpersonal relationships;
- Work and home life balance;
- Define work and personal goals and develop an associated plan and actions, with timelines to achieve the actions and goals;
- Improve work effectiveness;
- Time management;
- Move away from an autocratic management style to that of being more democratic and all inclusive;
- Move away from managing to leading.

Other coaching goals chosen by the coachees included the following.

- All three coachees had **unfulfilled career aspirations** which needed to be addressed;
- Improve delegation of work;
- Establish the source of and resolve the conflict between the CE and the Directors;
- Faster decision making (moving away from avoidance);
- Realisation of core values;
- Answer the question of "who am I"?
- Improve communications skills;
- Move away from being **too much of a driver** at the expense of employee relationships, productivity, and employee cohesiveness;
- Improve emotional response to conflict (CE);
- Address perceived personal weaknesses;
- More open to and willing to seek and bring about and embrace change in the organisation;
- Become more effective in the management of teams and work load;
- Shift and improve their behaviours and therefore the results they generated on a daily basis for themselves and the business;
- Be more forgiving;
- Be more tactful;
- Be more patient with others. Just get on with the work and perform attitude. Address the impatience and develop better leadership and mentoring skills;
- Not be so hard on others and self.

The foregoing coaching goals are a consolidated list of all three coachees coaching goals. Each had a selection of the foregoing which they worked on during the coaching intervention.

As there are too many goals to focus on in this case study, I will include a cross section of goals that relate to the business and the individual (as the two are separate and yet one). These case studies represent a small percentage of what the actual coaching sessions and intervention consisted of. The sections included below are intended to give you a sense of some of what took place during the coaching intervention.

The goals this case study will cover are as follows: -

- Improve networking, marketing, selling, and negotiation skills;
- Improve their thinking styles and patterns and therefore the results they drew to themselves and the business. Move away from fear based thinking;
- Stress management, including the negative effect stress has on interpersonal relationships. Achieve work and home life balance;
- Move away from managing to leading.

Coaching process chosen

As mentioned previously, three models were chosen for this coaching intervention. Professional coaching entails the combination and utilisation of the most effective processes to move the coachee forward. Coaching requires a skilful 'dance' between coach, coachee, and the processes and modalities used by the coachee in coaching sessions. Therefore pulling from all three models, I brought in suitable processes and tools when appropriate in the coaching sessions.

Having said the foregoing, one underlying process * in every coaching session was: -

- Information gathering;
- Goal determined / problem definition / desired state determined;
- List priorities;
- Explore options;
- Plan and design the intervention/next steps;
- Evaluate progress and amend actions if required.

* Remember, processes, questioning, and tools used in coaching sessions were drawn in from all three models when appropriate (over and above the process listed above). Therefore the foregoing was merely the foundation process used in the coaching sessions.

Underlying methodology used to bring about actions, positive shifts, new neural pathways, and the attainment of the coachees goals

Through skilful questioning, as coach I guided the coachees during each coaching session to have: -

- An **awareness** of the need for change, an awareness of the goal at hand, an awareness of why the goal should be achieved, the problem overcome, the chosen future desired state achieved;
- An **interest** to achieve the change, the goal, the chosen future desired state, to overcome the problem at hand;
- A **desire** to achieve the change, the goal, the chosen future desired state, to overcome the problem at hand;
- **Action** on the part of the coachee to achieve the change, the goal, the chosen future desired state, to overcome the problem at hand;
- Most importantly though, **learning** and therefore new thinking patterns, new neural pathways, new behaviours, and different improved, more desirable ways of being in the coachees.

First strategic and personal coaching goal: -

- Improve networking, marketing, selling, and negotiation skills.

The success of this business depended primarily on effective networking, marketing, selling, and negotiation skills. The Deputy Chairman (primarily), CE, and Directors saw the improvement of the foregoing as a key step to matching their operations and performance to their London office. The Deputy Chairman set the benchmark when it came to networking, marketing, selling, and negotiation skills. He was considered as a 'rain maker' in the industry when it came to generating business through networking, etc.

During each coachees first coaching session it became abundantly clear that all three coachees didn't enjoy networking and were not naturally inclined towards networking, marketing, selling, and negotiation (collectively referred to as marketing hence forth). The CE was effective to some degree. However the two Directors were more transactional. That is, they were extremely efficient at getting tasks done rather than the being effective at networking etc. The assessments confirmed my (the coach) analysis as a consequence of the coaching discussions in this regard.

As the Deputy Chairman (DC) was the 'standard' in the industry when it came to marketing, it made sense that his way of marketing would serve as the model for the coachees to move towards.

Therefore, as a consequence of coaching received, the coachees agreed to 'unpack' the DC's marketing process, methodology, behaviours, motivators,

style, 'trick's of the trade', and reasons why he was a 'rain maker' / successful in marketing / so successful in generating new business for the organisation on an ongoing, sustainable basis.

Through discussions and mentoring sessions (the coachees were coached towards getting mentoring from the DC in regards to marketing) with the DC, the CE and Directors quickly gained a deeper understanding of the DC's marketing processes, methodology, success behaviours, motivators, style, ways of thinking, and 'trick's of the trade'. It's important to mention that these individuals were dealing with million and or billion dollar companies and organisations. This was not 'child's play'.

Armed with the skills, knowledge, and style of thinking and behaving successfully to engage in marketing for success, the coachees were coached towards 'taking on' this new way of being in order to ensure sustainable positive change in themselves and therefore the business. The coaches were coached towards formulating action plans with associated time lines in regards to how they would take action to: -

- Practice the new skills and behaviours,
- Assimilate and integrate the new knowledge, and
- Internalise the new way of thinking in such a way that it became habit.

The coachees were then required to give feedback to the DC, the HR director and the coach (Steve Krummeck). This created an opportunity to discuss, build on, and or change what the coachees were doing, thereby bringing about a continuous improvement process.

So, through coaching the **awareness** for the need for change was brought about, **interest** was stimulated within the coachees (as they saw and realised they could and would grow out of this opportunity), a **desire** to 'up their game' came about through the realisation of the benefits (for them individually, collectively, and for the organisation) of increasing their focus and energy spent on marketing, they were prompted into taking **action** (taking on their new found knowledge, skills, behaviours, ways of thinking, etc) by going out and experimenting / marketing, and then taking stock of what went well, what could be improved upon, and what needed to be changed completely. That is, they **learned** through experimenting and therefore 'hard-wired' the new behaviours, new way of being, into being more inclined towards naturally marketing, toward naturally being successful at marketing.

In addition to the foregoing, the coachees were coached towards unpacking their resistance to taking action to market (a major reason why they avoided it in the first place). The reasoning for this step was so that when they understood why they were resisting going out to market (on a conscious level) in the first place; they would be empowered through coaching to overcome the subconscious obstacle/s/ blocks.

All three coachees assessments showed that they were not naturally inclined towards marketing. On some level of consciousness all three coachees were aware of this and therefore told themselves (this was determined through their coaching sessions) they were not good at marketing. This further entrenched the **belief** and therefore the avoidance and lack of success in marketing. This state of affairs naturally led into the second coaching goal.

Second strategic and personal coaching goal: -

- Improve their thinking styles and patterns and therefore the results they drew to themselves and the business. Move away from fear based thinking;

A great deal of coaching went into this goal. The majority of the processes, methodologies, and ways of enabling the desired changes in this goal / area, originated from my book, "The Game of Life & Success – Steps to Self Mastery & Happiness". For details of the steps, processes, methodologies adopted in these coaching sessions, purchase a copy of the book and or book a seat on the workshop related to the book.

In effect though, the coachees were coached towards mastering their choices, how they responded to every situation / 'reality' that presented itself to them,

their thoughts, therefore their behaviours, and as a consequence the results which they drew towards themselves and the business.

Amongst a multitude of other outcomes the coachees achieved (that they were coached towards) either individually and or collectively, included seeing and treating problems as opportunities, minimising so called negatives, moving beyond fear based thinking, being more purposeful and energetic, more self confident, happier (happy people are more successful, more energetic, find meaning in mundane tasks, are more focused, more positive, have improved relationships, earn more, live longer, are more creative, are generally healthier than others, and so the list goes on), and to be the masters of what unfolded before them (therefore what unfolded in the business). The bottom line is that they achieved some degree of self mastery.

By achieving the foregoing, the coachees overcame the belief that they were not marketing orientated, and therefore would not be successful when they engaged in marketing (networking, marketing, selling, and negotiation) activities.

As humans we are driven by two dominant emotions, namely fear and love. The majority of humans are driven by fear, fear of failure, fear of not being recognised, of not succeeding, of not meeting others expectations, of being lonely, and so on. As a consequence we are driven by negative drivers (fear). Negative drivers drain and exhaust us while positive drivers energise us. All three coachees were driven by fear. The climate in which they operated was one of fear. The pressure that was exerted on them from the DC resulted in them continuously being in a state of anxiety.

Fear is an emotional response to an external stimulus / event. That is, we either react out of fear (negative energy / a negative response) or out of love (positive energy / positive response) to stimuli / events. In essence we can choose how we will respond to the stimuli / events that are presented to us. Fearful reactions to external stimuli are taught to us from an early age. Therefore fearful thinking and or responses can be 'untaught'.

In view of the foregoing, my coachees were coached towards this realisation. That is, they were coached toward the realisation that they were predominantly driven by fear, that their thoughts were mainly fearful thoughts (a person has +- 60 000 habitual thoughts a day, eighty percent of which are negative). Their behaviours, communication style, problem solving processes, engagement techniques, and thinking styles, all communicated that they were predominantly driven by fear.

As their coach it was imperative that I brought about the realisation and understanding that they could be driven by positive drivers as opposed to negative, fear based internal drivers. How was this achieved you may ask? All three were prompted into turning around their fearful responses and or thoughts into positive responses and or thoughts and behaviours.

First they were coached to have *awareness* that they were driven by fear. Next, they were coached to change their internal dialogue, which we as humans almost constantly have with ourselves That is, changing their internal dialogue from being fear-based to love / positive energy-based.

A few simple examples of fear / negative internal dialogue were conveyed to them, namely: -

- "I'm no good at networking, marketing, and selling"
- "I'm flawed as a leader and manager"
- "Everyone reacts negatively to meeting me for the first time"
- "I'm going to fail anyway so why bother in the first place"
- "I can't do this"; and
- "I'm ineffective".

Turned around into love / positive internal dialogue these change to: -

- "I'm highly effective at networking, marketing, and selling and I enjoy this area of work"

- "I'm whole and infinitely capable of being and achieving all I set my mind to. I'm a highly effective, inspirational, strategic leader and manager"
- "I am well liked by all those that encounter me. I come across as professional, well informed, and an expert in my field"
- "I achieve everything that I set my mind to", and
- "These are the strengths, skills, and unique attributes that I have and I use them effectively every day".

The coachees could see the two *realities* were worlds apart and by embracing the love / positive internal dialogue, they began to plant powerful new *realities* into their subconscious, where they were accepted as being *real*. As the coachees began to adopt this process, within a short period of time they began to be drawn (by virtue of the new reality placed in their subconscious) towards a new, more productive, positive, and fruitful way of existing, of interacting with others, of responding to the business world around them.

My clients were also made aware through their coaching sessions that they should become aware of the words they use to describe themselves and others, being diligent in moving away from fear-based thoughts and words. Some sessions focused on bringing about awareness that thoughts and their verbal expression expose what people perceive as their reality. My clients were moved towards the realisation that as long as they held a particular thought, that *would be* their reality. The two are inseparable. They were moved toward the appreciation that that reality would only change when their thoughts (and subsequent actions) changed.

An important process was that they realised and made absolutely certain they become aware of their ongoing internal dialogue so that, if they found fear-based thoughts creeping in, they replaced them immediately with positive thoughts, emotions, and behaviours.

Third and fourth strategic and personal coaching goals: -

- Stress management, including the negative effect stress has on interpersonal relationships. Achieve work and home life balance; and
- Move away from managing to leading.

Both directors had little balance as reflected in their assessments, pre-coaching questionnaires, and in the initial coaching sessions.

The areas of greatest lack were community, love, helping others, play, friends, home, creativity, relatives, and goals and values (not knowing what their core values were as well as not honouring their core values).

A balanced life leads to / contributes to a focused, energised, productive, well rounded individual. This type of individual is a huge asset to any organisation. Both Directors were a far call from the foregoing.

Initial coaching sessions focused on identifying why the Directors had no balance. The main reasons were work pressure, lack of boundaries, no personal goals (and few work goals), no awareness of their core values (and therefore not living them), and a lack of focus on themselves, their families, and their friends.

Through skilful questioning, the coachees were brought to the realisation that their first objective was to draw up a strategy, business plan, and associated goals and actions to re-engineer the business in such a way that they would be in a position to lead rather than manage. They were doing more management than leading due to a shortage of skilled and knowledgeable managers in the organisation. Their strategy, business plan, and associated goals and actions in this regard were tracked in each coaching session, thereby ensuring ongoing forward movement. In addition to this, they regularly reported on progress in this regard in their monthly board meetings with the DC.

The foregoing step unfolded in time and resulted in the Directors naturally moving into more of a leadership role. Having said this though, some effort was

spent on coaching the Directors towards developing boundaries. That is, they naturally were drawn to step into the role of manager. I had to deliberately coach them to 'learn' to say no, hand the work over to their managers, and begin to think and act more like the leaders they were (this new way of being, new way of thinking, took some time but was eventually imbedded in their neural pathways and therefore became second nature). Part of the process was to coach the directors to carry out extensive research on what leadership is, what effective, strategic, inspirational leadership is, what effective management is, as well as draw up an actionable plan to move into the role of a leader, an effective, strategic, inspirational leader.

Most leaders think they know what a leader is, what an effective, strategic, inspirational leader is, until they carry out research in this area. Generally they quickly realise they have a great deal to learn and change as leaders themselves.

The next step was to coach and guide the coachees towards a deep realisation of their core values. Our core values are what drive us, what energise us towards any goal, towards a destination. If we don't value the goal we are moving towards, we will be less energised and less focused on achieving the goal.

Core values =

- One's principles, priorities, or standards;
- A principle, standard, or quality considered worthwhile or desirable;
- The desirability of something, often in terms of its usefulness or exchangeability;
- An ideal accepted by some individual or group;
- The idea of something that is perfect; something that one hopes to attain;
- A rule or standard especially of good behaviour; "a man of principle"; "he will not violate his principles."

Through this process, the coachees came to realise they were not honouring their core values. This was especially the case with the two Directors. An example of one of the two Directors core values was family. Neither were honouring this value and therefore felt unfulfilled and unhappy.

Thereafter I coached the coachees to complete a number of values exercises, namely the following: -

- A Values Worksheet (list their values, describe the value, & score their satisfaction with each value);
- Values Standards & Obstacles Worksheet (a list of their values, scored how they were honouring each value, stated how each value was honoured, listed the obstacle to honouring each value, and the strength of each obstacle to each value);
- Values action log (a log of what actions would be taken to honour their values).

Once the values exercises were completed the coachees were coached towards completing the wheel of life (eight key areas of our life we need to honour in order to live a balanced work and home life). From that they identified five areas of their life they were least satisfied with, and then drew up goals and actions (with time lines) to reach a state of being satisfied with each area.

The next step was to hold the coachees accountable in honouring their commitment to work on their actions to achieve the balance they so desperately needed. The coachees would give feedback in each session as to how they were progressing in this regard.

A powerful next step that I coached the coachees and business towards was a business wide values exercise. That is, each employee carried out the values process detailed above. Thereafter each employee was asked to choose five core values for the business, which values were an expression of their own core values. From the consolidated values, the leadership team chose the organisations new top five values (which in effect were an expression of each employee's core values). As a result of this process, these values became a powerful driving force to elevate the team and the organisation to a new level of

professionalism and a new level of performance.

10. Coaching process value-add/return on investment cycle

Due to the level of the coachees, supervision sessions between the coachees and their direct manager/HR manager, were not held. Again owing to the level of the coachees, the option of monthly coaching tracking reports being written and submitted were not opted for.

Progress sessions with the coachees and HR Director did take place (separately from one another) on a quarterly basis. During these sessions the following was raised: -

- Is the coaching intervention on track? Are the agreed upon time lines being met?

Original coaching goals and timing was discussed to establish whether the coaching intervention was on track or not. In addition to this, discussions took place to determine whether coaching sessions were still aligned to the individuals' goals, the teams' goals, as well as the strategic goals. All was on track.

- What measures were used to track the coaching intervention?

The original goals and agreed upon time frames.

- What was working in the coaching sessions?

- Tracking the coachees progress against their original goals and timelines;
- The freedom to discuss and explore options and solutions without being judged or pressurised was a positive for the coachees;
- Having an opportunity opened up through the coaching sessions to reflect on the changes the coachees wanted to make in their work and home lives;
- The development of personal and work plans and associated goals and actions;
- Being shifted into taking responsibility and accountability for their work and personal lives;
- A 'gap' being opened through the coaching sessions to plan and prioritise;
- Opening up an awareness in their coaching sessions that they did have a say in the business, that they could expect positive change, and that they needed to bring about the desired change;
- Serious discussion around what needed to change and improve in the business (attached to goals and actions). Example of changes needed – more staff / resources, more skilled and trained staff, less managing and more leading, realistic working hours, restructuring the organisation to work more efficiently, etc.

- What was not working in the sessions?

Concern was raised that two of the coachees were not putting in enough effort into preparing for their coaching sessions. That is, they did not work sufficiently on their goals and agreed actions as determined in their coaching sessions. The primary reason was (in their words) because of the lack of time. This was addressed by coaching the clients towards the realisation that they had to make time for what was important and what they had committed to.

The CE and one Director regularly cancelled coaching sessions at the last moment. Reason being that they did not have time. Both were coached towards realising the value of the investment they were making in themselves and the business by having coaching in the first place. They were also coached toward making coaching a priority, making time for it, and ensuring they derive maximum value from the time they set aside for the coaching. That is, make an effort to extract as much value as possible out of the coaching sessions and process as a whole (take responsibility and accountability for their coaching journey).

Another matter that was brought up in these sessions was that the coachees showed little to no inclination to finding the answers to their goals, problems, challenges, and end state, for themselves. They wanted to be 'spoon fed' what

they need to do to achieve their goals, overcome their problems, and achieve their chosen future desired state. This was as a result of years of conditioning from childhood. That is, our entire education system has predominantly been around teaching kids what to think and not how to think. As a consequence many adults today are unable to think for themselves. This was addressed through changing their thinking patterns, to getting them to see the light of the advantages of thinking for themselves, of finding the answers for themselves, to taking ownership, to being in control. As a consequence, new neural pathways were created (I am able to find the solutions myself, I am able to think for myself, I am in control of my destiny, I am whole, etc).

One Director tended to be too verbose. What one could generally say in one sentence, he said in ten. This was resolved by coaching the Director to realise he was losing his audience (be it one or many individuals) and therefore had to hone in on and communicate only the essential part of his message. He diligently practiced this new communication technique in front of the mirror in the mornings, in the work place with his colleagues, with clients, and in his coaching sessions.

What was negatively effecting the coaching intervention in general?

The Deputy Chairman expected his Directors to be working sixteen to eighteen hours a day. This culture, way of being, expectation, was having a direct negative effect on the CE and Directors efforts to bring about some degree of balance in their work and personal lives, their energy levels, ability to focus, and overall output. Their output was steadily decreasing. This obstacle was address through coaching the CE and Directors to realise they had to have boundaries and enforce those boundaries. Practically though, they began to focus more intently on re-structuring the business to allow themselves to lead more than manage and work.

- Suggested changes for the coaching sessions?

One of the Directors indicated that from time to time he wanted mentoring as opposed to coaching. The concept, terms, and boundaries were discussed, and mentoring was included when needed in his coaching sessions. Having said this though, coaching was always the default methodology. Mentoring was rarely used; thereby ensuring the coachee took responsibility for his journey and did not negate it by opening up a mentorship process.

- Was the coach coachee working relationship working, and if not, should another coach be assigned?

All three coachees where comfortable with their coach (Steve Krummeck)

11. Consolidated report and coaching summary.

Neither of these were required as the coaching intervention was tracked via the quarterly meetings and original coaching goals and time lines. Due to the small size of the organisation, this information was discussed with the HR Director and Deputy Chairman from time to time.