

# *The* **Leadership Partner**

## Case Study – Jason Hales

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Real Life Testimony

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## About Our Company

Formed in 1996, Leadership and Coaching Partner International (LCPI) is a people focused company offering partnership in coaching, leadership development, course design and large group programs across North America and Europe. Our unique and successful coaching techniques enable clients to expand their thinking, allowing them to see broader perspectives about how their personal style, behaviours, business relationships can better align with their natural skills and talents to deliver sustainable business results.

Our mission as “the leadership partner” is to help Leaders and their organization to be **sustainably successful**. Achievable and continued success involves two components: Leadership, to inspire and encourage change; and a Coach, to facilitate the change; Together we Partner and move towards the desired outcomes Internationally.

Our philosophy towards developing an organization is truly grounded in the principles of coaching. We guide the leaders and the organization to clearly articulate where they want to be. We raise awareness and honest clarity of the current situation so a plan can be developed to bridge the gaps. We foster the development of the skills, awareness or insights needed to close those gaps. Finally, we support the building of competencies that sustain the new behaviours and heightened levels of performance.

Then we move on.

We commit to making our clients self-sufficient, strong in their core and solid in their performance. Most importantly, we are committed to driving the critical business results needed by the organization through the power of its people.

**Thank you for the opportunity to share our passion and expertise with you.**

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### *Case Study 1 - Jason Hales and the coaching experience*

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Jason Hales is a healthcare professional in a senior management role at a respected multi-national corporation.

During his 30 years of corporate experience, he has worked with two executive coaches, and for the last 9 years has been coached by Merv Rogers.

Jason was interviewed about the coaching experience by an independent researcher.

### **First, why use an executive coach at all? How does coaching help you deal with the issues of managing a large team?**

“The issues vary from organization to organization,” says Jason. “But **interpersonal issues are the biggest factor**. Not getting along with people in your team or being unable to get the right support for your team. Or team members feeling that they are not getting the right support from their organization. Or having to fight with the organization for your team / division which isn’t given the importance it should be given.”

### **Which people in an organization are best suited to being coached?**

“Smart people are open to learn. Those are the real smart people. I have known people at 40 who tell me they know everything there is to learn, but you keep learning all your life. If you are open to learning and open to feedback you should do it. Because you can only learn. It will make you stronger, bigger as a performer, beyond what you thought was possible. You have to be open to learning and feedback. And if you are not open to it, and if you go in with the belief that you know everything there is to learn, then it is an absolute waste of time.”

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“If you are ever getting into a new challenge, getting into a job that's above anything you have experienced before, then my only advice to you would be to get a coach. Get somebody outside of the organization to advise you, a coach, not a mentor. Because that's important.”

“In any scenario if you feel overwhelmed by the situation, a coach can help. Now, when I was 35 I had problems I needed a coach to help. Now...I feel more capable of handling them, as I have been through that a number of times, I have more maturity, so I am more relaxed about it. That's all fine. But that's only possible because I had those experiences and handled them successfully with the help of a coach.”

### **Is there a danger that the coachee can become too dependent on the coach?**

*“...it's easy for over-dependency to develop... So yes, it is important to have a coach who has the maturity and experience to recognize and handle this.”*

“It's easy to go back to your coach for every single thing. Because it leaves you with a good feeling.

“When you are uncertain in your job, and your coach helps you through difficult discussions, that's great. At a certain point however, you start feeling uncomfortable taking decisions without his advice. In my instance Merv realized it too, and he started pushing back (without me noticing it much at that time). And so it all ended up fine. But I am sure I had instances when I was hesitant to take a decision without talking to Merv first about it. So in a sense it's easy for over-dependency to develop. There was one or two instances when I felt that okay I am becoming a little bit dependent here. I don't do things on my own anymore. But the minute you have that realization that's half the solution! You have to eventually become aware of it, take a step back and start doing it yourself. Learn to take care of it naturally. So yes, it is important to have a coach who has the maturity and experience to be able to recognize and handle this.”

### **Based on your experience, what should one look for in a prospective coach?**

**“The personal fit is the most important.** It has to be somebody who intellectually is on the same level as you, or who has coached other people at the same intellectual level as you. So he has to be someone who has done consulting for people on the same level as you or higher.”

“It's important to find the right one. If you come to the realisation that the coach is not the right one, then you change and work your way through.”

“And importantly, He should not have a big ego. He should be able to put his own thoughts in the backseat for a while, or for the whole time of your talk.”

“My first coach was someone who was hired by my then organization to do coaching for sales representatives and managers,” says Jason. “ He was a sales wizard who was taking some courses about sales effectiveness. I was supporting him in one of his projects, we got to spend a lot of time working together. So I rolled into it naturally, and he became my coach as well. It went well up to a point as I started rising up within the organization.”

“I noticed that I wasn't getting as much satisfaction and takeaways from my sessions (as I used to before). I got into an issue at work and turned to him, and he couldn't really help me.”

“He was struggling to cope with the fact that I was now growing to a level he hadn't handled before. His ego was getting in the way of supporting me fully in that stage of my career. I started getting the feeling that he was learning more from my situation than I was learning from him.”

“I told him I was planning to switch. He understood my reasons. He told me that coaches often go with certain phases in your career, and he was comfortable with that.”

### **How did Merv become your Coach?**

*“I also realized he (Merv) had the ability to read and communicate well with a variety of people and communication styles. That was a skill I also wanted to develop so maybe that also played an important role.”*

Merv was facilitating workshops within Jason's organization. These workshops were crucial to changing the managerial culture, says Jason.

“I saw Merv in a number of company sponsored workshops. I was quite impressed with the way he managed those workshops. It was very interesting to watch. So I got to see him at work at very close quarters. During our sessions I interacted with him a few times.”

“I also realized he had the ability to read and communicate well with a variety of people and communication styles. That was a skill I also wanted to develop so maybe that also played an important role.”

### **How does the coaching relationship with Merv work?**

“It varies depending upon my requirements to be honest. It's not like I meet him very frequently in person. In 9 years there was this instance when I saw him just twice in person! For the rest it's always over the phone, or over skype.”

“And there would be instances when we didn’t need to talk, sometimes nine months to even a year. But every time we had a Coaching session, it was like we were able to pick up from where we left. Because that trust, that wavelength has already been established. “

“But when I need him, I talk to him two times a week at length. It's very interesting that he makes himself available for such intense sessions.”

### **What are the instances when Jason would choose to consult with Merv?**

*“He has been there for me in a lot of decisive moments in my career... I always turn to him before starting a new job, a new challenge or a new project.”*

He has been there for me in a lot of decisive moments in my career. The first time I ever fired somebody. I remember discussing it with him, deliberating over which words to use, and how to proceed with it.”

I always turn to him before starting a new job, a new challenge or a new project. Especially if I feel I need advice, if I need support. I talk with him often, sometimes even two times a week, very intensively. It has a lot to do with my sense of feeling certain and uncertain.”

“Merv has coached me into leaving companies! “It's the right decision - go. It's not the right place, or the right manager that you have right now. So change it.” It's not that I am not able to do it. Rather he is helping you to draw a conclusion (with) clarity and certainty.”

### **How has coaching with Merv helped?**

*“For me he is like a sounding board.”*

*“Talking to him gives me the confidence to take my decision.”*

“In certain situations, Merv just gives me the certainty that it's the right decision just do it. For me he is like a sounding board. Talking to him gives me the confidence to take my decision. It was in a new job and I had to make a presentation for a new team. I was in a work environment where I really was not at ease, and he helped me out. He helped me take a big step forward.”

*“Coaching with Merv has the effect of empowering you to grow into your role and take decisions with confidence.”*

“Coaching with Merv has the effect of empowering you to grow into your role and take decisions with confidence. I remember the first time one of my teams got changed a bit. I had to lean on him to get through the challenges that put up for me. However, the next time that happened, I felt much more equipped to handle that transition (than the first time). That for me is the impact that a good coach can have on you.”

“Because I am relatively open to what he is saying, it makes this relationship work. There have been instances when he really pushes back. I understand that he knows me relatively well, and therefore it is something to definitely take into account. If he says re-think this Jason, or if this is not the way Jason does things, it's a useful insight.”

*“So once you go through something (with the help of a coach) you get stronger at it, and you can handle it on your own.”*

**Of the many instances when Merv has helped, what would be a good example?**

*“Merv helped me realize that this was coming from a place of fear and worry, rather than objectively analysing the opportunity and what it meant for my career. It helped me to refocus myself.”*

“Recently, I had applied for a job. After a coaching session with Merv, I realized it wasn’t the right step for me, and I let that job go. Four months later, the job market got a little tighter. I started feeling more emotionally insecure as the project I was working on wasn’t going that well. I was about to call that person and tell him that I was ready to take up his offer. But then I had a conversation with Merv.”

“We went over this decision together, as to why I decided against taking this job up in the first place. He helped me refocus my attention on the fact that the project I was working on was good for my career. I then decided to let that job (offer) go.”

“Basically Merv helped me realize that this was coming from a place of fear and worry, rather than objectively analysing the opportunity and what it meant for my career. It helped me to refocus myself.”

**Why have you worked with Merv for so many years?**

“I think he evolved with me. In the beginning of my career for instance, the conversation was mostly about how do I conduct this meeting or conversation with somebody. Over time however, our conversations were able to move on to more visionary stuff about how my life should look like. I think he also evolved in that way, he was able to train himself, he was able to broaden what he is able to talk about with people.”

“He probably has a few other coachees like me, who have gone through the same journey as I have, who he has guided over the years. That must have definitely played a part. I think he grew into what his role demanded of him.”

**How does Merv work with larger teams?**

“In that case he comes in as a team coach and facilitator. I got him to work with two of my teams. He came in and did a DISC profile of the group and I think it went very well!”

“Afterwards of course he was able to coach me even better as he saw my team and he knew what I was facing: the tensions, the complications, the personality. So that was quite an interesting exercise.”

“One of the things good people do in their careers is (to focus) on learning. It's to be open to learning. If I wasn't open to learning I wouldn't be able to learn anything from Merv. So if you have a good team, they will be interested in learning and open to it, and whatever comes in their direction they will take it up.”

**How does Merv's skill in one-to-one coaching, workshops / team workshops, and organization level events compare?**

*"...he communicates in a very direct way. I can imagine that some people might be woken up by that. That's a good thing in my view. Whoever comes out of a session with Merv is going to experience an impact."*

"I have seen him across all three to be honest. I would hire him for any of these three activities. He's different and agile enough to be excellent in all these three activities. He can be pushy if that's what needed, he can hold back if that's the need of the hour. He does that quite well. When he does the organization level work, he gets people who are from a completely different profiles to start talking about the real issues, because he communicates in a very direct way. I can imagine that some people might be woken up by that. That's a good thing in my view. Whoever comes out of a session with Merv is going to experience an impact."

**Closing thoughts from Jason Hales.**

**What would you advise someone who is at the beginning of their career?**

*"Be humble. Learn. Make sure you have a small ego. Because many people get lost because of worrying about their big egos. Go for the max and take risks. Especially when you are wrong. That's exactly what I am doing now. I am diving into the world of startups which is interesting. It is also pretty risky because I have two children dependent upon my income. It is risky to start a startup. You might not find the necessary capital then the adventure is over isn't it? But that's okay my coach has shown me I can continually develop and reinvent myself to meet any challenge."*

**Changing attitudes is really tough, and it often gets difficult to do that for yourself as well as your team. How have you managed to do that in your career?**

*"It often takes years to be honest! It comes with age, and getting the right advice, and getting good and bad experiences. You learn really by making mistakes, and bouncing your head against something. And then having somebody besides you, who reminds you that that's okay and that you should go ahead, get up and go on. You have your family, I have my brother, my wife of course. But to have someone neutral outside of the business really helps there! Changing attitudes is notoriously difficult to pin down. It's something that happens after years of successes and failures."*

## Coaching and Facilitation Services

Our application of coaching goes beyond the traditional one to one setting. The Coaching philosophy is baked into all facets of the workshops, facilitations, all company meetings, working offsites and interventions we design and deliver.

Our sessions are not designed around manufactured trust exercises. Although there may be some value to those -- we set out to create a shift in thinking - a shift in behaving. These shifts happen when an “experience” is designed to allow each person an opportunity to gain a more profound understanding of each other and provide a forum for the leader to authentically declare the expectations of the business. We facilitate not just a path to your desired outcome, but a sustainable path for results.

Facilitation with a coaching style is the difference between simply “training” and a lasting “experience”.

A Facilitator, in its pure sense, is someone who helps a group understand their common objectives. The Facilitator then assists in the achievement of those goals from a neutral standpoint. The result is a strong basis for future action derived by consensus from all team members. A Facilitator with a coaching style does that PLUS drives the impact even deeper by encouraging dialogue on issues that most likely have never been openly shared. We create opportunities to identify barriers and build effective action plans.

Every program we deliver is unique. Whether we are delivering a program multiple times across an organization, or for the first time in a new organization, our goals are the same - to facilitate the desired outcome of the leaders. The method by which we facilitate varies as we flex and adapt to the various mindsets and paradigms of each group.

Our goal, through discussions and planning calls ahead of our program delivery, is to design a series of learning experiences that will:

- influence the adoption or enhancement of mindset/behaviours that align to the program objective;
- identify the key barriers that stand in the way of change across the organization;
- educate leaders on the nature of the change, the impact of the transition, and their role in it;
- involve leaders in developing techniques that help the people through their transitions and growth;
- create a sense of personal ownership and accountability; and
- provide mechanisms to cascade the messages across the organization.

### Our tactics could include:

- Working Offsites - establishes the leadership mindset needed throughout the organization to support the change.
- Leadership Summits - transitions people through organizational change and identifies how they can contribute.
- All Company Meetings – provides an experience that engages the entire company into an aligned direction and provides a foundation to influence and shape the organizational culture.
- “Working Together to Win” Workshops – creates high performing teams through the identification and understanding of business challenges, the strengths of the talent that exists, and how to apply the current talents and strengths to the business challenges.
- Coaching Clinics - heightens the Manager’s ability to have purposeful conversations and provide feedback that develops others and deals with critical performance corrections.

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