

The **Leadership Partner**

Case Study – Coaching Impact on Big Change.

Real Life Testimony

1155 Bough Beeches Blvd
Suite 607, Mississauga
Ontario, Canada. L4W 4N2

+01.905.509.8869
merv@theleadershippartner.com

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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.

Case Study 4A – How the coach approach was applied to organizational changes.



Sofia is a veteran in the field of medical devices, having spent the last 29 years leading different verticals within a major multinational corporation. She successfully steered the finance division through a major change process, and as a result has been promoted to the leader of business development in a different vertical within the company. In this conversation she reflects on managing big change in large organization.

Finance shifted globally to a new operational model that dismantled three fully functioning and separate divisional finance organizations in order to build cross-divisional support, common systems and same processes.

Europe was the first geography to transition into the new model. In many cases their work and learnings made the subsequent transformations in other geographies much easier and faster.

Sofia’s team blazed the trail.

This is digest of the much longer interview conducted with Sofia. For the full case study “Managing Big Change in a Large Organization, please visit www.TheLeadershipPartner.com to download.

We now join Sofia and our researcher already in conversation ...

Q. When you engineer such a large shift, it does entail stepping on a few toes. So how did you handle that transition?

This change meant there were numerous different systems and processes. That was fine for the then decentralized company with different divisions. But four years ago, a decision was made to merge the products and services divisions. Each division had its own finance team. Sofia was given the responsibility of merging and rationalizing the finance teams.

It also meant taking on people from different verticals of the business and get them operating as one organization, says Sofia. This included moving finance functions from in-country units to in-house centers of excellence.

“We have always been a decentralized company, and we have prided ourselves on that.”

“I was appointed to be the chief financial officer for Europe for the businesses which came together.”

“It meant that immediately we had to identify what would be our strategy from the business point of view, but also for me as the CFO, I had to solve the challenge of inheriting two separately led finance teams. And I had to bring these teams together. And that meant having to look for opportunities to find synergies and optimized structures.”

“My starting point as CFO, was in an organization where I had 28 finance directors in the region! Three years later, we whittled that down to 14 finance directors in the region. So half of what I started with.”

“The change program I led with my finance team started with the belief we are all going to embrace the one organization model and we are going to make it work. I want the finance leaders to be setting the pace for the rest of the organization in making this work.”

“Were we stepping on toes? Yes. Absolutely! We had to tell people that we will be doing things very differently to what we were doing in the past. We needed to tell many of them

that they did not have a role anymore within this (organization). I also wanted to take this opportunity, not only to optimize and bring these teams together, but also to bring new blood to the organization.”

“We reduced the number of finance directors by 50%. I was also bringing in new people who came from the two other divisions of the organization. Obviously, this had a big disruptive effect. We effected a pretty drastic change.”

Q. Traditionally, change is viewed as a top down process, and one that is individually driven. In your experience, what were the challenges of ensuring its sustainability? How did you manage to institutionalize this?

“It's not something that happens overnight. It starts with having a vision. You have to be clear towards your leadership team, about what kind of leadership behavior you should embrace together.”

With Merv's help, Sofia and her teams started talking about the leadership changes they need to make as a collective, about demonstrating the right mindset in terms of working across different parts of the organization, as well as retaining intellectual curiosity.

Merv Rogers was the executive coach. One of Merv's, corporate culture initiatives was to organize an annual multi-day, face-to-face meeting with the top 100 finance people in the region, both Sofia's direct reports and other finance team members.

“...to talk about how we could collectively shape that (behavioral) change. Because...it is important to talk to people, to create a bond, an environment where people are willing to work with each other.”

“People also want to see that you are willing to walk the talk. They also need to see the benefit of that new approach personally, in terms of transfers, or promotions or activities.

We absolutely have invested a lot of time in communications, town halls, virtual town halls, bringing people together.”

“We talked collectively and aligned collectively on these leadership choices that we would embrace.”

Q. Could you give us an example of that? How did you keep that alignment alive over time?

Sofia rewarded people for demonstrating the specific leadership behaviours the organization agreed to and felt where needed in the new structure. They called it Quarterly Choices awards.”

“We started to reward people for living by those leadership expectations. We call it our quarterly choices awards. We hand these out in the organizations.

“Every quarter we ask our employees to nominate teams or individuals who embrace the Leadership Direction and demonstrate the Intention and Choices. It is a well laid out system where we get them to lay out their rationale for nominating (the recipients). They get a certificate, a \$200 voucher that they can use on a dinner date with a partner. “

“And in a town hall, we actually hand out these certificates. They are pleased and they can actually see their colleagues being recognized for living into the required behavior.”

“As Merv says, **‘Culture is simply behaviours over time’**”

Q. In your opinion why do other organizations fail with respect to a culture shift? Why aren't others able to do the same?

Other companies, notes Sofia, might believe this has to be done in a much more prescriptive, project managed way.

The Culture shifts only when we are given the liberty to co-design and co-shape the future behaviours.

"It perhaps goes back to the point I mentioned earlier (about our company's values), we create jobs around people."

"I was not asked to do this. No one gave me a framework. But my company allowed me to shape and mold the way with my colleagues, rather than prescribe how things have to be done. There were very clear expectations with respect to the way forward. However, I said from the beginning, that we must be given the liberty to co-design and co-shape this.

"For me, this is not a change for the sake of change. When we make this change, the end place has to be a better place than where we are today. And the company has allowed that dialogue"

"We have to ensure that we don't drown out that individual voice that can help make things better. Because it is easy to drown that voice out, which is what we sometimes see in other companies."

Q. So in this entire scenario, what would be the role of an external coach?

In working with Merv and his team, Sofia points to three main areas where an external coach can help:

1. Clear on what we stand for
2. Help shape the content
3. Facilitate the process

"Three things that an external coach can do. Crystallizing very clearly, within the leadership team, what we wanted to stand for. Then helping us prepare to do it and communicate it. Helping us work through challenges with our teams from a leadership point of view. They also helped to translate our internal vision to the larger group of leaders across the organization and co-facilitating that. I stressed on co-facilitation very intently. Because I wanted very clearly to ensure that these meetings are owned very strongly by me and my leadership team. The approach that the coaches brought, particularly with the co-facilitation worked perfectly in our case."

"I think Merv and his team has done an amazing job in helping us prepare and have been critical at facilitating and co-facilitating the face-to-face meetings."

Q. What has your experience of coaches been like?

Sofia points to her experience with large consulting firms, noting that after the consultants have left, she still has to face and work with the people affected by any changes.

“The experience with Merv has been excellent. He stayed with us and empowered us to be in-charge.”

“My experiences with business coaches in general, with regards to making big change in large organizations, hasn’t been good (except with Merv of course). I would say that I have always been reluctant to implement what they suggested. Because in a sense it is me who will be left holding the can and dealing with the consequences of all the decision making. There is a difference between challenging someone, having conceptual discussions with someone and actually making the change happen on the ground.”

“My experience with Merv has been excellent. With Merv, I realized that things ended up being almost tailor made, because of the way we were. But with others—especially with these big consulting houses—it hasn’t been that great. The ‘Big Firms’ paint a picture of doom and gloom and give you the impression that they are the ones with the solution, and they make you dependent on them.”

“That was not our experience with Merv at all. That's why I keep saying that it is ultimately about the individual who is helping you drive change as a coach.”

“I think there is a big responsibility on both sides. When it comes to bringing about big change in an organization, I am quite reluctant to have an external agency drive that change. I truly believe that the change has to come from within and assisted from outside, otherwise it is not sustainable.”

Q. Considering that Merv is an outsider to your organization. What made you trust his methods and processes?

“It was very much based upon our personal connection. I had one or two meetings with Merv, prior to starting with this process.”

“After a certain time with a coach, you can quickly identify whether there is a connection, whether you feel a sense of chemistry, you get the hunch that your outlook and perspectives match. It was very much based upon our personal connection. I had one or two meetings with Merv, face to face, prior to starting with this process.”

“I got Merv to work with all the members of my team, to whom I had to communicate. He also had to connect with different people of the finance department, even those that did not report directly to me.”

Q. So why was Merv a good fit for your organization?

The personality, candor, and the mentality that Merv brought on board. The pragmatic, positive mindset contributed to that as well.

“I feel that if we had gone with any other person, I might well have come to the conclusion that this will not work, and we would have had to abandon it. In the consulting business, there are a lot of companies. Therefore, for me, it's about the individuals you work with, it's not about whether its company X, Y or Z. It's the individual, he or she, who makes the real difference in that consulting experience.”

“I think it's probably also the personality, candor, and the mentality that Merv brought on board. The pragmatic, positive mindset contributed to that as well. I have that too, and I found that so did Merv, and that helped to a great extent.”

Q. So in your opinion, what should the role of an external coach be in large organizational change to make it sustainable?

“What the external coach does, is to provide you an external sounding board— a mirror if you like—and at given points just get all your ideas together.”

“An external (coach) can really help in providing the outside perspective especially if you have spent a really long time in a company. For me the external help is far less needed in the aspects of project planning, internal assessments and so on. But what the external coach does, is to provide you an external sounding board— a mirror if you like—and at given points just get all your ideas together. It is something that can be very helpful.”

“Certainly from my perspective, I can absolutely see a big change process where a lot of the support come in from a third party, coaching comes from a third party, but the actual transformation process is handled internally, because that is the only way for this to be truly sustainable.”

Q. This has been a particularly enriching conversation! Thank you for sharing your experience with us.
... You are most welcome!

“Implementing a coaching approach to changing, transforming and aligning organizations is very, very doable, and for successful companies, is their competitive edge.” Merv Rogers, MCC.

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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