

## Case Study: Executive Coaching

# A multi-billion dollar financial services firm transitions to a new CEO and Management team.

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We worked to refine, develop, and optimize the interaction of the Board and Management team with a new CEO in order to provide clarity, improve decision making, and ensure sustainability.

**The Firm:** A multi-billion dollar financial services organization with tens of thousands of employees, a new CEO in a high profile position and a sophisticated Board.

**The Challenge:** The Board and CEO have just received their feedback in an annual performance evaluation process. Both the Board and CEO identify an opportunity to develop their working relationship, with each other and with the Management team, based on the business priorities and performance expectations arising from the evaluation. Given the sensitivity and potential consequences of managing through these different levels of leadership, the Board and CEO agree to reach out for expert assistance.

**The Solution:** Using the CEO performance feedback report as a starting point, and in conversation with the CEO, we developed a language and practical operating framework to guide the CEO's interactions with the Board and his Management team. This allowed the CEO to maintain leadership practices that had traction and target areas identified for improvement with powerful, simple, models to refine leadership style. The nature of the coaching engagement evolved over time to include value-added services involving several of our experts who helped the primary coach facilitate conversations, analyze organizational issues, and structure management retreats.

**The Results:** The Board and CEO performance evaluation results demonstrated both Executives and Board Directors regarded their relationship with the CEO as being improved and constructive. The CEO continues to maintain the coaching relationship and has engaged his team in a developmental program arising from some of the constructs discussed in the coaching engagement. The value-added model of coaching with access to a variety of leadership advisors and experts was identified by the client as a significant value driver.