

A Leadership Coaching Case Study: Shifting Mindsets, Building Practices, Improving Performance

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EXECUTIVE SUMMARY

Barbara, Manager of Talent Development for a business-to-business sales operations outsourcing company, was badly underperforming. Her manager had received complaints about the quality of her customer service and collaboration with peers. Her manager endorsed coaching to improve critical skills and related performance. Barbara enthusiastically accepted the chance to be coached. Client and coach co-designed an individual development plan with goals. The client completed self-assessments and the coach structured 360 interviews and debriefed the data. Client and coach refined the development plan and goals. Coaching calls were held regularly, with learning assignments made and regular reviews done for progress, challenges, and lessons learned. Overall, the client progressed in several emotional intelligence skills, delivered better customer service, and collaborated better. When reassigned to an individual contributor role, she adapted well, led, and contributed to two critical projects.

ORGANIZATION BACKGROUND

A2Z was founded 12 years ago by a top salesman and a sales industry consultant. Initially, the business solved specific sales industry market needs. Over time, the offering expanded to address the entire sales operations lifecycle. More recently, offerings have evolved further to improving and enabling operational excellence, and beyond that to providing market leadership and exceptional customer experience. The company has grown to more than 2,000 employees in the US, China and India. It was purchased by a venture capital company three years ago. There are aggressive growth and profitability targets to meet for the next three years.

Helen Shumaker has been Vice President of Global Talent for the past three years. Formerly Vice President of Human Resources, she worked in China for six years as an expat, building a human resources infrastructure and a somewhat more Western-style management culture. Now back in the US located at headquarters, she has four direct reports. Global Talent is accountable for designing, developing and delivering on key talent initiatives in the US and India, its most recent overseas location. China predominantly operates on its own with its own set of management practices. Most of the training is to support onboarding and develop technical skills. In the past five years, Global Talent has supported leadership coaching for the Chief Executive Officer and five of his direct reports as well as three middle managers.

CASE DESCRIPTION

Barbara Johnson, promoted a year earlier to Manager of Talent Development, is struggling to perform well. She is accountable for developing Human Resources content and implementing policy and procedure, as well as developing her three direct reports. Initially an individual contributor for two years, she has taken on her managerial duties without any training or mentoring in management or leadership, often the case (Witt, 2020).

Since she has been in her new role, she tended to complete and deliver work on time but it was incomplete and mistake-riddled, requiring rework and diminishing her trustworthiness with her customers, including the Chief Executive Officer and Chief Operating Officer (Covey, 2006). At the same time, she was very concerned about tasks being done right and tended to micromanage, leading to dissatisfaction from her direct reports. She often overreacted emotionally in challenging situations, triggering defensiveness and dissatisfaction in those with whom she interacted.

Her manager, Helen, suggested a coaching intervention to improve Barbara's performance and produce greater satisfaction for all concerned. A coach (author) had been providing leadership coaching with the Chief Executive Officer and four vice presidents on the senior leadership team. The client accepted the opportunity to receive leadership coaching, recognizing that her performance was below standard (Goldsmith, 2007). By her own admission, she tended to be emotionally volatile, rigid in approach and only moderately successful in delivering internal client satisfaction on human resources issues. She viewed this as an important opportunity worth fully embracing.

About Coaching and Leadership Coaching

According to the Institute of Coaching, "Coaching is an interpersonal process that helps people achieve positive change and growth. By harnessing innate strengths, uncovering intrinsic motivations, and asking empowering questions, coaching fosters self-generated insight, vision and goal clarity. This process can be used by anyone seeking to make a positive difference in themselves or in the world around them." There doesn't seem to be a universally agreed on definition of leadership coaching. That said, Lee & Frisch (2011, pp. 49-50) offer their working definition: "an employer-sponsored ... relationship between a coach and a leader in an organizational context aimed at enhancing or improving some combination of the leader's current performance, future development, or transition to a new role." For leadership, executive and business coaching, once there is an agreement between coach and organization for work to be done that benefits both client (coachee) and customer (organization) (see Schlosser, Steinbrenner, Kumata, & Hunt, 2006), a commitment-based structure is established within which coaching can occur.

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