

TRANSITION COACHING FOR A SENIOR EXECUTIVE

As SVP of Operations at an American Financial Services company, Miles had lead several hundred people across Europe. The organisation had gone through some major changes, including acquisitions, and during this time Miles's response to change and removing poor performers in his leadership team had been considered slow. A reflective and intelligent individual, he was then asked to take on a newly created role--internal consultant in the Chief Executive's office.

Miles's company wanted him to be able to influence at multiple levels and regions in the hopes he would be able to go further in another role in 24 months. They also wanted to test how much of a self-starter and innovator he really could be. When I met Miles, he was struggling with feelings of failure from the previous role, worried that he wouldn't be able to make the shift from leading hundreds to influencing across the globe without a hierarchy of staff, and daunted by the enormity of his new project—to redesign how the globally expanding company managed trades. With scores of data systems and their owners, this was no small influencing task. He was finding it difficult to concentrate, too, as the quiet, plush of the executive suites lacked the verve and energy of the operations floor. There were no deadlines, no demands on him, simply an enormous project with a deadline 2 years away.

Having met with Miles's leader and gaining his input, Miles and I started by setting specific goals and writing a coaching plan. Use of personality and motivation psychometrics kick-started the coaching so that we immediately had a common language to use about how Miles sees the world and what his personal preferred working style is. We talked openly about what had gone wrong in the past and what he wanted to go right in the future. Together we identified his strengths to leverage and "watch outs" that could trigger behaviours he wanted to eliminate.

We worked together for a total of 8 sessions over seven months. Throughout coaching, Miles accepted the responsibility for setting the topic agenda, and I came prepared with key questions and areas to explore based on the previous session and our overarching goals. Working through his fears and re-shaping his internal image of what an executive leader is, and more specifically, helping him truly embrace that in himself, Miles quickly brought his strategic dexterity and conceptual prowess to the fore. I challenged him on his lack of incorporation of others' ideas. He overcame his "dislike for client-facing work" and he started networking and building rapport more broadly. He ultimately laced several ideas from others into his final strategy. The buy-in to his resulting plan and strategy was strong, though not without difficult consequences to some in the organisation, which Miles then worked through with new conflict management skills. When we ended coaching, he had begun implementation.

Ahead of schedule with his initiative, the Company was able to move Miles into a new role 12 months early. He selected a successor to carry on the delivery of the project. He then assumed his first truly global leadership role, covering Europe, Asia and parts of the US. He contacted me again at this time, some 5 months since we had ended the previous contract. We set new goals, incorporating his previous accomplishments, and began a four-session, four-month transition coaching engagement.

This time Miles hit the ground running. We did some joint reflection on the mindset shift required in the new role. Within two months he had his new global leadership team in place. He led a series of team meetings in which they jointly defined the strategic plan and thus the buy-in was strong. The pace of his progress surprised even Miles, and he thus decided to "bank" our final session. Eight months into his new role we had the final session. Whilst there had been key challenges in both the business landscape and his team, he had managed them all with resilience, diplomacy, and timeliness. His success on all counts was also confirmed independently by other senior leaders in the organisation.